

COUNTYWIDE CHIEF BUSINESS OFFICERS MEETING
AUGUST 30, 2018
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	District Business & Advisory Services Update	Judy Kershaw, Santa Clara COE
10:15 - 10:45	Technology & Data Services Division Update	Cindy Patterson, Santa Clara COE
10:45 - 11:15	State, Economic and Legislative Update	Robert Miyashiro, School Services of CA
11:15 - 11:45	LCAP Review Process – Recap and Feedback	Jannelle Kubinec, WestEd
11:45 - 12:00	Closing	Megan K. Reilly, Santa Clara COE

FY 2018-2019 MEETINGS

DATE	TIME	ROOM
August 30, 2018	9:30 a.m. - 12:00 p.m.	Milpitas Room
September 27, 2018	9:30 a.m. - 12:00 p.m.	Oak Grove Room
October 18, 2018	9:30 a.m. - 12:00 p.m.	Milpitas Room
November 15, 2018*	9:30 a.m. - 12:00 p.m.	Oak Grove Room
January 24, 2019	9:30 a.m. - 12:00 p.m.	Milpitas Room
February 28, 2019	9:30 a.m. - 12:00 p.m.	Milpitas Room
March 28, 2019	9:30 a.m. - 12:00 p.m.	Milpitas Room
April 25, 2019	9:30 a.m. - 12:00 p.m.	Milpitas Room
May 23, 2019	9:30 a.m. - 12:00 p.m.	Milpitas Room

*Meeting cancelled due to CASBO CBO Symposium

I N V E S T I N G F O R



EQUITY • DIVERSITY • INCLUSION • PARTNERSHIP

Vision

Transforming Education through
Leadership, Service, and Advocacy

Mission

The Santa Clara County Office of Education
is committed to serving, inspiring, and
promoting student and public school success.

Goals

- Improve access to inclusive, equitable, high-quality education.
- Provide quality support to districts, schools, students, and communities.
- Be a premier service organization.

Values

- | | |
|-----------------|-------------------------------------|
| Students First | Focus on Student Success |
| Collaboration | Leverage Collective Capacity |
| Innovation | Champion Creative Thinking |
| Service | Exceed Expectations |
| Strengths-Based | Engage Strengths to Improve Results |

2018-19 CBO LIST

DISTRICT	CBO	EMAIL	PHONE NUMBER
Alum Rock Union School	Kolvira Chheng, Chief Business Officer	kolvira.chheng@arUSD.org	(408) 928-6847
Berryessa Union School District	Phuong Le, Assistant Superintendent	ple@busd.net	(408) 923-1861
Cambrian School District	Penny Timboe, Chief Business Official	timboep@cambriansd.com	(408) 377-2103 Ext. 116
Campbell Union High School	Nancy Torres Pfeiffer, Chief Business Officer	npfeiffer@cuhsd.org	(408) 371-0960 Ext. 2030
Campbell Union School District	James Crawford, Chief Business officer	jcrawford@campbellusd.org	(408) 364-4200 Ext. 6214
Cupertino Union School District	Jeff Bowman, Interim Chief Business Official	Bowman_Jeff@cusdk8.org	(408) 252-3000 Ext. 61412
East Side Union School	Chris Jew, Associate Superintendent for Business Services	jewc@esuhsd.org	(408) 347-5050
Evergreen School District	Mary Stark, Interim Chief Business Official	mstark@eesd.org	(408) 270-6846
Franklin McKinley School District	Jason Vann, Assistant Superintendent Business Services	jason.vann@fmsd.org	(408) 283-6064
Fremont Union High School District	Christine Mallery, CBO / Associate Superintendent	christine_mallery@fuhSD.org	(408) 522-2245
Gilroy Unified School District	Alvaro Meza, Chief Business Officer	Alvaro.Meza@gusd.k12.ca.us	(408) 848-7126
Lakeside Joint School District	Susan Ady Chief Business Official	sady@lakesidelosgatos.org	(408) 354-2372
Loma Prieta Joint Union	Cathy Vance, Chief Business Official	c.vance@loma.k12.ca.us	(408) 353-1101 Ext. 5502
Los Altos School District	Randall Kenyon, Assistant Superintendent	rkenyon@lasdschool.org	(650) 947-1160
Los Gatos Union School	Ana Mendez, Interim Chief Business Official (Ryland School Business Consulting)	ana@rylandsbc.com	(408) 335-2022
Los Gatos-Saratoga Joint Union	Rosemarie Pottage - Chief Business Officer	rpottage@lgushsd.org	(408) 402-6330
Luther Burbank School District	Rudy Avalos-Sanchez, Chief Business Official	ravalos@lbsd.k12.ca.us	(408) 295-2450 Ext. 237
Metropolitan Education District	Marie Dela Cruz, CBO	mdelacruz@metroed.net	(408) 723-6419
Milpitas Unified School District	Wendy Zhang, Assitant Superintendent	WZhang@musd.org	(408) 635-2600 Ext. 6033

DISTRICT	CBO	EMAIL	PHONE NUMBER
Moreland School District	Patricia Ernsberger, Chief Business Officer	pernsberger@moreland.org	(408) 874-2922
Morgan Hill Unified	Kirsten Perez - Assitant Superintendent	perezk@mhusd.org	(408) 201-6052
Mount Pleasant School District	Tracy Huynh, Director of Business Services	thuynh@mpesd.org	(408) 223-3719
Mountain View Whisman	Dr. Robert Clark, Chief Business Officer	rclark@mvwsd.org	(650) 526-3550
Mountain View-Los Altos Union	Mike Mathiesen, Chief Business Officer	mike.mathiesen@mvla.net	(650) 940-4667
Oak Grove School District	Laura Phan, Assitant Superintendent	lphan@ogsd.net	(408) 227-8300 Ext. 100216
Orchard School District	Jenina Moreno, Chief Business Official	JMoreno@orchardsd.org	(408) 944-0397 Ext. 202
Palo Alto Unified School District	Cathy Mak, Chief Business Official James Novak Effective 9/1/2018	cmak@pausd.org jnovak@pausd.org	(650) 329-3980 TBD
San Jose Unified School District	Stephen McMahon , Deputy Superintendent	stephen_mcmahon@sjusd.org	(408) 535-6131
Santa Clara County Office of Education	Megan Reilly	Megan_Reilly@sccoe.org	(408) 453-6519
Santa Clara Unified School	Eric Dill , Chief Business Official	edill@scusd.net	(408) 423-2024
Saratoga Union School District	Akur Varadarajan- Interim Chief Business Officer	avaradarajan@saratogausd.org	(408) 867-3424 Ext. 207
Sunnyvale School District	Lori Van Gogh, Chief Financial Officer	lori.vangogh@sesd.org	(408) 522-8200 Ext. 1007
Union School District	Rita Sohal, Assistant Superintendent	sohalr@unionsd.org	(408) 377-8010 Ext. 44202

Technology & Data Services Division

Business System Update

Hottest News

- New W4 in 2019?
- Draft from IRS on June 6th, 2018
- Will require payroll changes
 - No exemptions
- Employees to complete new form
- New data entered into business system



Staffing

- Currently 8 analyst positions
- 1 recent resignation – purchasing focus
- Interviews complete, final pre-boarding



Oasis Enhancements

ESS:

- Unique district URL – no changing districts in right corner
- Consolidated for multi-district employees
- Warrant stubs
- Requisition Routing



Oasis Enhancements

General Ledger:

- Reoccurring payments via pay-vouchers - scheduled multiple payments with roll process at the end of the fiscal year.;
- Make PO Payments using new invoice payment screen with splits across accts to make it easier to make purchase order payments when there are multiple accounts
- New mass liability/enc roll process. Search PO data for PO lines with remaining balance(s) and put in grid for mass generation of liability and roll-encumbrance transactions. Use security to limit end-user ability to do either function. Allow separate column for liab/enc roll amount so a single line could have two transactions generated when appropriate.
- Vendor ACH for employee vendors using payroll ACH



Oasis Enhancements

Budget:

- Enhance multi-yr projection feature being developed for QSSUG according to SC-COE requirements.



Oasis Enhancements

Other areas of interest:

- Enhance multi-yr projection feature being developed for QSSUG according to SC-COE requirements.
- Fixed Asset Import
- California Controller Report



In Development

- Credit Card income processing
- Travel Reimbursements
- Asset Management
- Last Mile Considerations



Santa Clara County Office of Education
State, Economic and Legislative Update
Countywide CBO Meeting | August 30, 2018



State, Economic and Legislative Update

Santa Clara County Office of Education
Countywide CBO Meeting
August 30, 2018

Presented by
Robert D. Miyashiro
Leilani Aguinaldo

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Economic Update

Santa Clara County Office of Education
State, Economic and Legislative Update
Countywide CBO Meeting | August 30, 2018



U.S. Economy

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- The U.S. economy continues to expand at a brisk pace
 - Gross Domestic Product (GDP) increased at a 4.1% annual rate in the second quarter of this year
 - GDP growth in the first quarter of 2018 was 2.2%
- UCLA forecasts a “3-2-1” economy
 - 3% growth in 2018; 2% growth in 2019; 1% growth in 2020
- The U.S. economy has struggled to reach 3% growth for the last ten years
- The current U.S. unemployment rate is 3.9%
 - The record low unemployment rate was 2.5% in June 1953
 - The unemployment rate reached 10.8% during the Great Recession



Stock Market Record

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- On Tuesday, August 21, 2018, the S&P 500 reached a record high of 2,872, before closing slightly lower at 2,862
- The bull market is nine and one-half years old, making it the longest on record
- The S&P 500 is up more than 300% since the bottom of the financial crisis in February 2009
 - The previous record ran from October 1990 to March 2000
 - The index is up more than 7% in 2018



Santa Clara County Office of Education State, Economic and Legislative Update Countywide CBO Meeting | August 30, 2018



California Economy

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- The California economy, like the U.S. economy, continues to expand
 - The Department of Finance (DOF) reports that state GDP increased 3% in 2017
- The state unemployment rate is 4.2%, the third month of record lows going back to 1976
 - Job growth, however, is slowing
 - 800 jobs added in June
 - 7,200 jobs added in May
- Housing, a broad barometer of the health of the economy, is showing mixed signals
 - The median home price hit a record high of \$603,000 in June 2018
 - Sales volume, however, was down 7.3% from June 2017



State General Fund Revenues

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- The 2017-18 fiscal year closed out on a high note, with revenues exceeding the May Revision forecast
 - May and June revenues combined beat the forecast by \$1.5 billion
 - The personal income tax and the corporation tax beat the estimate, while the sales tax lagged
- The first month of the new fiscal year fell short \$178 million, or 2.4%
 - The sales tax fell short \$480 million, or 22%
 - However, the DOF indicates that this shortfall could be related to the shifting of tax receipts from July to August and therefore may not be sign of true weakness



General Conclusions

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- The underlying economics remain positive, but concerns are mounting that a slowdown may be coming
- Risks to the economy
 - The Federal Reserve is expected to raise interest rate twice more this year which is expected to slow the economy
 - The escalating trade war may expand to other parts of the economy, lowering corporate profits and increasing the price of consumer products
- The state budget is well poised to weather a moderate downturn, given its record reserve
- In five months a new governor will be sworn into office and will unveil his first spending proposal for the state



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State, Economic and Legislative Update
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Education Trailer Bill Cleanup

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- Changes to the Local Control and Accountability Plan (LCAP) template intended to shorten the LCAP while improving fiscal transparency
 - LCAP Planned Expenditures Summary will report expenditures in a tabular format for all LCAP actions/services in each goal, broken out by fund source – Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds
 - New summary table in Demonstration of Increased or Improved Services for Unduplicated Pupils section will provide a list of the actions that increase or improve services for unduplicated students and the associated expenditures
- State Board of Education (SBE) will adopt new LCAP template by January 31, 2020



Education Trailer Bill Cleanup

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- Oversight of school districts under state receivership will reside with the county superintendent rather than the Superintendent of Public Instruction (SPI)
 - Appointment of State Administrator will be done by county superintendent with concurrence of the SBE President and SPI
 - The Fiscal Crisis and Management Assistance Team (FCMAT) to provide list of candidates for State Administrator
 - California Collaborative for Educational Excellence (CCEE) may provide assistance to the district under receivership

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State, Economic and Legislative Update
Countywide CBO Meeting | August 30, 2018



Key Bills

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- Assembly Bill (AB) 1754 (McCarty) – changes eligibility requirements for certain full-day state preschool programs operated by LEAs
 - Status: Held in Senate Appropriations Committee
- AB 2808 (Muratsuchi) – amended by Senate Appropriations Committee to express legislative intent to increase LCFF funding
 - Status: Passed Senate Appropriations to Senate Floor
- AB 3136 (O'Donnell) – increases funding for special education
 - Status: Held in Senate Appropriations Committee
- Senate Bill (SB) 328 (Portantino) – changes the start time for middle school and high school to no earlier than 8:30am
 - Status: Assembly Floor; failed passage in 2017, reconsideration granted



Local Control and Accountability Plan: *CBO Debrief Session*

August 30, 2018



• 1 •

Your Feedback

- Support districts to exercise local control
- Support orientation towards performance
- Provide timely and supportive feedback and guidance
- Avoid one-size fits all
- Simplify, streamline the review process



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Guiding Principles for a Streamlined and Effective Process

- Avoid creating work for districts that does not directly feed into engagement and communication with stakeholders
- Support local control and responsibility
- Recognize the unique context of districts within the county, including variations by type, size, and funding levels
- Encourage learning and sharing of effective practices

• 3 •

Minimum Specifications

- Budget Summary
 - Total General Fund Expenditures
 - Total Funds Budgeted for Planned Actions/Services
 - General Fund Budget Expenditures not included in the LCAP
- Annual Update
 - Planned Expenditures
 - Actual Expenditures
- Goals Actions, Services
 - Budgeted Expenditures
- Increased or Improved Services
 - Estimated Supplemental and Concentration Grant
 - Percentage to Increase or Improve Services

• 4 •

Process

- **Santa Clara County Review Team – DBAS and Educational Services – worked with WestEd to review LCAPs**
 - Checked for meeting minimum specifications and understanding of district context
- **Questions and comments communicated by email and phone calls**
- **Official notification by letter from County Superintendent to Governing Board President – “no surprises”**
- **If changes are made, submit changes to the COE and save and post as “COE-Approved Version” and reference in the Annual Update for 2018-19**

• 5 •

Examples of Good Practices

- **Summaries and crosswalks to budget details**
- **Explanations for material budget differences helpful to understand changes year-to-year**
 - For future LCAP's, explain any variance in excess of 10% of the planned expense by action is explained as part of the Annual Update analysis
- **Reflecting adjustments in budget for salary and benefit increases**

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Questions and Discussion

LCAP Planned Expenditures Summary

Action	Description	LCFF	Other State	Local	Federal	Total
Goal 1:	Students will demonstrate grade level knowledge in all core subjects and graduate in 4 years exemplifying our PUSD graduate profile. All students [and student groups that have been less academically successful in the past] will have access to a robust course selection and will show academic achievement.					
1	Instructional coaches (28 FTE)	2,157,951	0	0	931008	3,088,959 **
2	English learner support and leadership	693285				693,285 **
3	Instructional and socio-emotional support	500000				500,000 **
4	Curriculum content specialist (ELA, math, sci	137247	350000		150000	637,247 **
5	Instructional leadership, College/Career	460908				460,908 **
6	Instructional tech coaches	248000				248,000 **
7	Above ratio staffing for high-need schools	282883				282,883 **
8	Intervention teachers (targeted schools)	599550			163000	762,550 **
9	CTE teachers (10.8 FTE)	983813	994454	238665		2,216,932 **
10	Supplemental teachers (new-comer academy	120000				120,000 **
11	Art instruction	735332				735,332 **
12	Foster youth supports	2000000				2,000,000 **
13	Enrichment intruction (TOSA, dual immersion	1395522				1,395,522 **
14	Site-level allocations (instruction)	1000030				1,000,030 **
15	Extended learning programs	370945				370,945 **
16	Instructional resources	356324				356,324 **
17	Computer/technology support	197946				197,946 **
18	Library services (middle and high school)	800924				800,924 **
19	Professional development	610422			352000	962,422 **
20	College and career readiness outreach and tr	108708				108,708 **
21	Site-level allocations (services)	1650000				1,650,000 **
22	School counselors (middle/high school)	2681629				2,681,629
23	Class-size reduction (K-3)	4070858				4,070,858
Totals		22,162,277	1,344,454	238,665	1,596,008	25,341,404

Action	Description	LCFF	Other State	Local	Federal	Total
Goal 2:	A well-trained and qualified teacehr in every classroom, every day supported by adequate, well-trained support staff					
1	Beginning teachers support and assessment	275000				275,000 **

2	Professional development (classified)	26992				26,992	**
3	Recruitment and training	129608				129,608	**
4	Ensure qualified staffing/ratio	99544985				99,544,985	
Totals		99976585				99,976,585	

Action	Description	LCFF	Other State	Local	Federal	Total	
Goal 3:	Students will be in school every day in a clean, safe, caring and conducive setting. All facilities will be clean and in good repair and equipped for 21st century learning.						
1	Child welfare attendance and safety (staffing)	577017				577,017	**
2	Child welfare attendance and safety (services)	161010				161,010	**
3	Foster youth liaison and support staff	70987				70,987	**
4	Social workers	224335				224,335	**
5	Behavior project aides	375000				375,000	**
6	Health services staff	890802				890,802	**
7	Foster youth intervention services	1400000				1,400,000	**
8	Secondary security staff	278859				278,859	**
9	Mentors (attendance and behavior)	1916				1,916	**
10	Site-level allocations (recess/general)	400000				400,000	**
11	Facilities (staffing)	9867535	2638622	95960		12,602,117	
12	School safety officers	1434411				1,434,411	
13	School nurses (13 FTE)	223911	1170549			1,394,460	
Totals		15905783	3809171	95960	0	19,810,914	

Action	Description	LCFF	Other State	Local	Federal	Total	
Goal 4:	Parents and guardians feel welcomed at their school, have sufficient two-way communication with their school and are provided with knowledge and skills to successfully support and advocate for their child.						
1	Family and community engagement	104738				104,738	**
2	School community liaison	126910				126,910	**
3	Community assessments	402624				402,624	**
4	Professional development for parents	22695				22,695	**
5	Materials and services	0				-	**
6	Translation services	245450				245,450	**
7	Communication	155809				155,809	**
8	Community partnerships (City)	75000				75,000	**

9	School site allocation	293418				293,418	**
10	Parent/Community Ombudsman	225000				225,000	**
Totals		1651644				1,651,644	

Action	Description	LCFF	Other State	Local	Federal	Total	
Goal 5:	Systems and processes of the district are effective, transparent, and efficient. The central office is responsive to the needs of the school sites.						
1	Continuous improvement and planning	305654				305,654	**
2	Data analysis and research	150000				150,000	**
3	Technology	1000000				1,000,000	**
Totals		1455654				1,455,654	

Overall Total (All Goals)	141,151,943	5,153,625	334,625	1,596,008	148,236,201
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Subtotals of Personnel and Non-Personnel Expenditures

Total Personnel Expenditures	140,934,188	Total Non-Personnel Expenditures	7,302,013
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mark Total with * if action is repeated across multiple goals (counted only once in Overall Total)

mark Total with ** if action contributes to increased or improved services

Estimated Supplemental and Concentration Grant Funds	23,358,584
Percentage to Increase or Improve Services	18.35%

Increased or Improved Services Summary		
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This section includes all actions that contribute to increased or improved services for unduplicated pupils. It is organized into three groupings: (1) actions provided LEA-wide to all students; (2) actions that are targeted to one or more unduplicated student group; (3) and, for school districts and county offices of education only, actions provided only at certain schools or school serving certain grade spans.

1. Actions provided LEA-wide to all students

Action	Description	Scope/Location	Planned Exp.
1.1	Instructional coaches (28 FTE)	All schools	3,088,959
1.3	Instructional and socio-emotional support	All schools	500,000
1.4	Curriculum content specialist (ELA, math, science)	All schools	637,247
1.5	Instructional leadership, College/Career	All schools	460,908
1.6	Instructional tech coaches	All schools	248,000
1.11	Art instruction	All schools	735,332
1.13	Enrichment instruction (TOSA, dual immersion, IB)	All schools	1,395,522
1.14	Site-level allocations (instruction)	All schools	1,000,030
1.15	Extended learning programs	All schools	370,945
1.16	Instructional resources	All schools	356,324
1.17	Computer/technology support	All schools	197,946
1.19	Professional development	All schools	962,422
1.20	College and career readiness outreach and training	All schools	108,708
1.21	Site-level allocations (services)	All schools	1,650,000
2.1	Beginning teachers support and assessment	All schools	275,000
2.2	Professional development (classified)	All schools	26,992
2.3	Recruitment and training	All schools	129,608
3.1	Child welfare attendance and safety (staffing)	All schools	577,017
3.2	Child welfare attendance and safety (services)	All schools	161,010
3.4	Social workers	All schools	224,335
3.5	Behavior project aides	All schools	375,000
3.6	Health services staff	All schools	890,802
4.1	Family and community engagement	All schools	104,738
4.2	School community liaison	All schools	126,910
4.3	Community assessments	All schools	402,624
4.4	Professional development for parents	All schools	22,695
4.5	Materials and services	All schools	0
4.7	Communication	All schools	155,809
4.8	Community partnerships (City)	All schools	75,000
4.9	School site allocation	All schools	293,418
4,10	Parent/Community Ombudsman	All schools	225,000
5.1	Continuous improvement and planning	All schools	305,654
5.2	Data analysis and research	All schools	150,000
5.3	Technology	All schools	1,000,000
	Total		17,233,955

2. Actions provided to one or more unduplicated group (EL, FY, LI)

Action	Description	Scope/Location	Planned Exp.
1.2	English learner support and leadership	EL, All schools	693,285
1,10	Supplemental teachers (new-comer academy)	EL, Blair HS	120,000
1.12	Foster youth supports	FY & LI, All schools	2,000,000
3.3	Foster youth liaison and support staff	FY, All schools	70,987
3.7	Foster youth intervention services	FY, All schools	1,400,000
4.6	Translation services	EL, All schools	245,450
Total			4,529,722

3. Actions provided only at certain schools or schools serving certain grade spans

Action	Description	Scope/Location	Planned Exp.
1.7	Above ratio staffing for high-need schools	Blair & Muir HS	282,883
1.8	Intervention teachers (targeted schools)	6 schools	762,550
1.9	CTE teachers (10.8 FTE)	All HS	2,216,932
1.18	Library services (middle and high school)	MS & HS	800,924
3.8	Secondary security staff	MS & HS	278,859
3.9	Mentors (attendance and behavior)	MS	1,916
3,10	Site-level allocations (recess/general)	Elementary	400,000
Total			4,744,064

Overall Total	26,507,741
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For each action/service being funded and provided on a schoolwide or LEA-wide basis identified above, include the required descriptions supporting each schoolwide or LEA-wide use of funds.

[Answer]

Describe how services provided for unduplicated pupils are increased or improved by at least the percentage identified above, either qualitatively or quantitatively, as compared to services provided for all students in the LCAP year.

[Answer]