



# **2019-2020**

# **Budget Allocation Plan**

**SELPA II**

Cupertino, Fremont, Sunnyvale, SCCOE



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## **2019-20 BUDGET ALLOCATION PLAN**

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## GUIDING PRINCIPLES:

### 1. Definitions:

- **Administrative Unit (AU):** The AU is the agency (County Office of Education) through which the funding passes from the California Department of Education to the districts within the SELPA. The distribution of funds by the AU is guided by the Special Education Local Plan Area (SELPA) Budget Allocation Plan. The AU (or SELPA Office) also has other fiscal and programmatic responsibilities in implementing the Local Plan for Special Education.
  - **California Department of Education (CDE):** The California Department of Education is the agency calculating the funding for each SELPA and distributing the funds to the Administrative Unit of the SELPA.
  - **Free Appropriate Public Education (FAPE):** Derived from the Federal Law (now IDEA '97), Free Appropriate Public Education refers to public schools being responsible to provide free appropriate public education services to disabled students in public schools, private schools, and to suspended or expelled students with disabilities.
  - **Least Restrictive Environment (LRE):** Derived from Federal law (IDEA '97), this term is used to describe how students with disabilities interact with the general education population of students. This term refers to the idea that "to the maximum extent appropriate, children with disabilities are educated with children who are nondisabled and that special classes, separate schooling, or other removal of children with disabilities from the regular educational environment occurs only when the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily."
  - **Regional Programs:** There are several categories of Regional Programs. For purposes of funding they are identified in three basic categories. The first is programs operated by the County Office of Education with a specific funding mechanism agreed upon by the SELPA being served. The second is a program operated by a district that is designed to serve students from districts within the SELPA. This too has a specific funding mechanism agreed upon by the districts within the SELPA. The third category is a program operated by a district, serving students with low incidence disabilities and is open to all districts within the county.
  - **SELPA:** A Special Education Local Planning Area (SELPA) is a district or group of districts united together to provide a continuum of services for students age birth through twenty-two residing within the geographical area. The SELPA governance structure ensures both fiscal and programmatic support to those educational agencies within the geographical region.
2. It is the responsibility of individual districts within each SELPA to assure a Free Appropriate Public Education (FAPE) for each special education pupil residing within its geographical boundaries. This responsibility shall be met by direct provision of services, establishing an agreement with another public education agency, or contracting with a non-public school or agency.
  3. Allocation procedures will be fair and equitable to all districts and to the County Office of Education.
  4. The maximum State Funding will be fully utilized, according to allocation procedures and the budget allocation plan.
  5. Changes in allocation of funding will be determined according to designated timelines, so districts and the County Office of Education can make fiscal and personnel decisions.
  6. SELPA Budget Allocation Plans will be developed in accordance with current law.
  7. Districts should not be financially impacted in a negative way by operating a program for the benefit of the other districts within the SELPA.
  8. The principles of "Free Appropriate Public Education" (FAPE) and "Least Restrictive Environment" (LRE) shall not be compromised by fiscal consideration.
  9. Districts shall be accountable for the allocation and reporting of funds in support of programs and services to identified students.
  10. A uniform method of payment should be established for students served from outside the SELPA.

## COMPONENTS OF AGREEMENT:

### 1. Flow of Funding:

- a) **State Special Education Apportionments** flow from the California Department of Education (CDE) to the Administrative Unit (AU) which is the Special Education Local Plan Area (SELPA) Office at the Santa Clara County Office of Education (SCCOE). The distribution of revenue is managed by the SELPA Office Administrator and allocated in monthly increments according to the formulas agreed upon and specified in this document to each of the three (3) districts and the SCCOE Special Education department in SELPA II. The SELPA AU will distribute the apportionments immediately upon receipt.

Beginning in 2011-12, a new CDE guideline requires multi-district SELPA AUs to account for all transfers of revenue from SELPA to member LEAs in a Special Revenue Fund (fund 10), outside of the SELPA AU General Fund. Only pass-through revenues will appear in the new fund. SELPA AU and Low Incidence Equipment revenue and expenditures will continue to be accounted for in the General Fund (sub fund 810).

- b) **County Excess Property Taxes for Special Education** will be calculated by the SELPA AU, based on prior year December and April average pupil count. Each district's share of County Excess Special Education Property Taxes will be reduced by that district's share of the cost of using SCCOE Special Education programs. (Appendix B)

Santa Clara County becomes the 5<sup>th</sup> county in the state with **Special Education "Excess ERAF"** (joining Napa, San Mateo, Marin, and Mono counties). This resulted in a "swap" of SCCOE Special Ed Property Taxes for Special Ed State Aid.

- Prior to 2015-16, the Excess ERAF prior year adjustment "swaps" were done at the SELPA AU level, and affected districts only in the delayed transfer of Excess ERAF property tax for the amount of the Special Ed deficit.
  - In 2015-16, the Special Education Excess ERAF "swap" for Special Ed State Aid becomes the third funding source for AB 602 Entitlements: 1) SCCOE Special Ed "Excess" Property Tax Transfer; 2) Special Ed State Aid, 3) Special Ed Excess ERAF Property Tax. This is a dollar-for-dollar exchange of Property tax for State Aid, with timing of the cash disbursements being the only difference.
- c) **Federal IDEA Grants** Awards are sent directly to SELPA office and are distributed to districts as follows (Appendix G):
- **Federal Local Assistance Entitlement (Resource Code 3310)**  
Beginning 2018-19, Preschool Local Entitlement (Resource 3320) will be consolidated into Federal Local Assistance Entitlement.  
The Federal Local Assistance Entitlement is distributed to districts as follows: Distribute Preschool allocation (9.01%) by Prior Year December 1 Preschool Pupil Count; Distribute balance (90.99%) by Prior Year June P-2 Total K-12 ADA  
  
Beginning 2007-08, Local Assistance to SCCOE will be transferred from districts as partial payment for actual usage of SCCOE programs. (see 3.i Balance to SELPA Level Funding State Aid)
  - **Preschool Grant (Resource Code 3315)**  
The Federal Preschool Grant is distributed to districts based on prior year December 1 preschool count (ages 3-5).
  - **Preschool Staff Development (Resource 3345)**  
The Preschool Local Entitlement is distributed to districts based on prior year December 1 preschool count (ages 3-5).
  - **Federal Mental Health (see 1.f. Mental Health Funding)**
  - **Alternative Dispute Resolution Grant (Resource 3395)**  
The Alternative Dispute Resolution Grant is used to pay for attendees of ADR conferences and cost of hiring an independent ADR facilitator.

Federal and state regulations regarding the use of Federal Grant funds will be strictly adhered to. (See also Maintenance of Effort Section of the Components of Agreement.)

In 2013-14, Federal Local Assistance was removed as one of the funding sources for AB 602. Once removed, State Aid will not automatically backfill any decrease in Federal Local Assistance funding.

Districts will submit to the SELPA office quarterly reports and a final expenditure report summarizing their actual expenditures for the fiscal year. The grants are paid as a reimbursement with the amount based on districts quarterly expenditures report. The grant period is extended to 27 months and a budget plan submission is required if districts have not fully expended the grant amount after the 15 month of grant period. Beginning 2015-16, CDE required LEAs to provide the Indirect Cost Rate and total indirect expenses on the Final Expenditure report.

**d) Regionalized Services and Program Specialist Revenue**

The SELPA Administrative Unit budget, included in this document, is developed by the SELPA AU and approved by the SELPA Representative Council each year. SELPAs I, II, III, IV and VII share the cost of the SELPA AU by total K-12 ADA using the RS/PS revenue. Beginning 2013-14, Regionalized Services and Program Specialist revenue that was previously used to fund the SELPA AU, were rolled into the AB 602 base calculation. However, beginning 2018-19, the Regionalized Services and Program Specialist Revenue has been reestablished as a separate revenue item using language in AB 1808 Budget Trailer Bill. These are not new funds; they will just be pulled from the AB 602 Base. Previously, in the AB 602 base, they were distributed to Fremont UHSD as part of the regional cost share, and will continue to be distributed this way in the new revenue calculation.

SELPA AU will continue to invoice \$400 per district to cover costs of providing for SELPA Staff Development, in lieu of individual registration fees (ex: Diagnostic Center trainings).

**O.T. (Occupational Therapy transfer):** Each year \$50,050 is transferred from SELPA III Base Funding to the SELPA II Regionalized Service Budget for OT services, see MOU #1. This amount will be transferred to Sunnyvale ESD for the partial reimbursement of OT cost incurred by Sunnyvale on behalf of all of the districts in SELPA II.

**e) Low Incidence Equipment and Service Revenue**

Districts and County Office of Education Special Education Department may order Low Incidence Equipment through the SELPA AU office, until those funds are depleted each year. Equipment purchased with these funds become the property of the state of California, must be inventoried, and may follow students, as needed, if they move to another district or SELPA within the state of California. The Low Incidence Equipment inventory will be kept by the SELPA AU office. SELPA II Operations Committee agreed to review all Low Incidence Equipment items exceeding \$5,000.

In 2013-14, Low Incidence Equipment and Low Incidence Services revenue were blended together and can be spent interchangeably. There will no longer be separate grant reporting on Low Incidence Services.

Purchases of Low Incidence Equipment for inter-district transfer students will come entirely from District of Residence LI Equipment funding, except when transfers cross SELPA AU, in which case the District of Service will pay current year per pupil LI Equipment amount and the DOR will pay the balance.

**f) Mental Health Funding**

ONE-TIME supplemental mental health funding was allocated to LEAs in fiscal year 2005-06 through 2010-11, for the sole purpose of providing pre-referral interventions to students prior to referral for AB 26.5 mental health services. These services could include: counseling and guidance services, psychological services, parent counseling and training, behavioral services and social work services. These were restricted funds; therefore districts had to ensure that they were used only for pre-referral intervention activities. This funding stream no longer applies, and has been folded into other MH funding streams going forward.

• As part of the cost sharing arrangement, SELPA II agreed to pass Federal Mental Health Funds through to Fremont UHSD, and Fremont UHSD agreed to manage the Therapeutic Services Contract with an

agreed-upon NPA to support the TSDC programs.

- SELPA II agreed to distribute State Mental Health Funds (Resource 6512) to districts based on Prior Year June P-2 Weighted ADA, after full payment of Therapeutic Services Contract to Fremont UHSD.
- See Appendix H for more detail on guidelines on Mental Health funding.

**g) LCI/NPS/SNF Cost Share (Out-of-Home-Care Funding)**

SB 1108 (2004-05) provided that the reporting and 100% reimbursement from the state for the cost of NPS tuition for LCI residents became inoperative on June 30, 2004. In place of that, the CDE will calculate annually for each SELPA an amount for "Out-of-Home-Care" funding.

While this funding is intended to help pay the cost of serving a greater population (students living in GH, FFA, SNF, ICF and CCF, served in all types of programs, not just NPS), the estimated amount to be received by Santa Clara County is considerably less than previously received for the 100% reimbursement for the smaller population of LCI/NPS alone.

Because the new funding formula provided less revenue than the previous 100% reimbursement for NPS/LCI, and the cost for these services has not diminished, a deficit in NPS/LCI was anticipated each year which must be shared by all districts in Santa Clara County. The exact method for sharing that deficit was decided by Superintendents representing all the SELPAs in the county.

Beginning in 2010-11, Out of Home Care Funding and Expenditures for NPS/LCI (Paid by SCCOE) are cost shared separately within each SELPA AU. See MOU in Section A. First priority with Out of Home Care revenue remains to reimburse SCCOE for NPS/LCI Tuition expenditures.

**2. MOU #1 and MOU #2:**

MOU # 1 and MOU # 2 are agreements made between all SELPAs in Santa Clara County during the transition from J-50 to the AB 602 funding model. MOU#1 provides guidelines for distribution of revenue from units reported in SELPA III in the base year for serving pupils in SCCOE programs from all districts in the county. MOU #2 distributes revenue from the base year maximization of J-50 reporting to all SELPAs. (Appendix A)

- In 2005, a consultant was hired to perform an analysis of the two countywide agreements in view of statewide equalization and changes in the use of SCCOE Special Ed programs that have occurred since the agreements were written. Following the study, the (SELPA) Superintendents' Representative Council voted to make no changes to the MOU agreements.
- In 2015-16, a committee consisting of the two SELPA Directors and the two SELPA Fiscal Analysts in NW and SE SELPAs met to assess whether the MOUs still represented a fair re-allocation of AB 602 in the County. The recommendation from the two SELPA AUs was to make no changes at this time.

**3. Calculation of Apportionments:**

**a) Basic Funding Model**

As specified in AB 602, the California Department of Education will allocate special education funding to SELPAs based on the SELPA Base Rate per K-12 ADA. The basis for calculation of the SELPA rate is the combined revenue (after deficit) received by all of the districts (and SCCOE) within the SELPA from J-50 reporting of operations in the base year (1997-98). The formula includes a combination of three sources of Special Education Revenue: 1) State Special Education Apportionment, 2) County "Excess" Special Education Property Taxes, and 3) Federal Local Assistance (IDEA Part B). Inter-SELPA unit transfers in the base year were reversed at State-calculated rates to adjust revenue to SELPA-of-Residence. The total of this revenue (in 1997-98) for all member districts of the SELPA divided by the total K-12 ADA (in 1997-98) for all member districts of the SELPA constitutes the SELPA Base (Year) Rate-per-ADA. The base year was amended with the filing of the "Maximization of 1997-98 J-50s (see MOU #2). All subsequent years have



been built on this base year rate, by adding COLA, State Equalization (if applicable), positive or negative adjustments for Growth (or decline) in total K-12 ADA, and any other additional SELPA revenue per ADA (such as on-going Mandated Cost Settlement to SELPAs, and Federal Augmentation Revenue to SELPAs, and Supplements to the Base.)

Beginning 2013-14 CDE has removed Local Assistance as one of the 3 funding sources of AB 602 entitlements. There will only be 2 funding sources going forward. CDE is reducing the SELPA rates/ADA to reflect only the 2 sources of revenue. Local Assistance will be distributed as a stand-alone grant, similar to all of the other IDEA grants. So, any future decrease in Local Assistance will not need to be reflected in a corresponding increase in Special Ed State Aid.

In SELPA II, Base Rates were calculated for each district in the same manner, as follows:

1997-98 revenue (from State Special Education Apportionment, County Excess Tax Transfer, and Federal Local Assistance Grant) were added together. Adjustments were made to bring Inter-district Transfer revenue and County Office Special Education Revenue back to Districts-of-Residence. The net result is divided by the total K-12 ADA at P2 1997-98 (as specified in the AB 602 formula). This became the Base Rate for each district as AB 602 was implemented. Each subsequent year a district begins the year with the same entitlement that it ended with the previous year. A district's entitlement increases by any allocation of COLA, or Growth, State Equalization or other additional SELPA revenue made to the district. At the end of each year a new District Base Rate is calculated by dividing the current year revenue by the current year ADA. At the end of each year a comparison will be made of the district Base Rates-per-ADA within the SELPA to determine which districts are lowest-funded and eligible for equity adjustments in the subsequent year. For the purposes of comparing district Base Rates, only the AB 602 formula will be used. Revenue Limit for special education ADA will not be included in this comparison. Sample Revenue Calculation is also included in Appendix B.

For SELPA II, District Base Rate/ADA equalization was reached in 2007-08. After reaching Base Rate equalization, all districts receive new, on-going, revenue at the same rate per ADA.

Agreement for 2013-14, is to assume Local Assistance is still in the AB 602 Calculation for this one transition year. That is, District rates/per ADA for the total of the 3 sources of revenue (before inter-district transfers and payment for SCCOE Special Ed pupils) will remain equalized during the transition.

In 2014-15, Local Assistance will be distributed to districts outside of the AB 602 Base. In order to continue equalized rates/ADA, Special Ed funding will be distributed using Prior Year P2 ADA instead of by pupil count so that the distributions of Local Assistance do not change during the Grant Award Period.

**b) SELPA COLA Funds**

COLA for the SELPA is calculated by CDE at a percentage of the bifurcated statewide target. The dollar amount per ADA is distributed to SELPAs based on prior year total K-12 ADA. .

Bifurcated COLA (and Growth) began in 2005-06, when the CDE began calculating COLA and Growth on the State/Local portion of AB 602 funding only, basically subtracting average Federal Funding from the average (or Statewide Target) Base Rate. Then the COLA rate is applied to that part of the Statewide Target only.

In 2007-08 50% of COLA was used for equalizing base rates, 50% was distributed to all districts by ADA. Efforts to equalize Base Rates per ADA will be suspended during 2008-09, and 2009-10 and 2010-11 and 2011-12, as no COLA is received.

In 2019-20, the COLA rate is 3.26% or about \$17.5935060619/ADA.

**c) SELPA Growth Funds**

Growth funds in SELPA II will be distributed to (or deducted from) each district, based on the change in total K-12 ADA to the current year from the previous year. Growth will be allocated or deducted at the

average base rate within the SELPA. Any difference in the total growth adjustment for the SELPA and the CDE formula for SELPA Growth (based on the Greater ADA over a three year period) will be adjusted at the same rate per ADA from each district, so that the difference does not interfere with the SELPA's progress toward equalizing base rates between districts.

**d) Equity Adjustments**

SELPA II has agreed to make efforts to equalize Base Rates- per-ADA between districts within the SELPA over a period of time.

SELPA II agreed to apply 50% of all new revenue (other than growth) toward equalizing base rates in 2007-08. The remaining new revenue was distributed to all districts based on prior year ADA. SELPA II agreed to suspend efforts at equalizing base rates for the 2008-09 and 2009-10, 2010-2011 and 2011-12 fiscal years.

For Transition Year 2013-14 in which Local Assistance is removed by CDE as a funding source for AB 602 entitlement, districts agreed to continue to keep Revenue/ADA equalized using all three Revenue Sources for 2013-14.

In 2014-15, SELPA II agreed to complete the Equalization Plan in 4 years instead of 7-year plan previously agreed in 2012-13.

At the end of 2015-16, all districts (and SCCOE sponsored Charters) in SELPA II will receive AB 602 Entitlements at the same rate per total K-12 ADA, before adjustments are made to follow students to SCCOE programs and Inter-district transfers.

**e) Unallocated Funds**

Any unanticipated or unallocated revenue coming to SELPA II will be reported to the SELPA Operations/Fiscal Committee for review and recommendation as to allocation. A recommendation from the SELPA Operations Committee to the Executive Council regarding the distribution of unallocated funds will be made.

**f) Non-Public School/Agency Costs:**

A set aside pool of funds for NPS/NPA will not be implemented at the SELPA level for SELPA II. Districts will continue to be individually responsible for these costs.

**g) LCI/SDC/MTU/Trans Cost Sharing**

The cost of LCI students receiving services in SDC programs and in SCCOE programs and are residing in NW SELPAs will be shared by all districts based on percentage of total K-12 ADA. Cost sharing credits to districts for serving LCI residents in district SDC programs is aligned to Inter-district transfer agreements (severe/non-severe). Districts charged for sending LCI students to SCCOE programs will be credited the amount charged.

The following will also be included in the LCI Cost-Sharing Agreement. These costs will be shared by all of the districts in the NW SELPAs by total K-12 ADA.

- Palo Alto USD will receive a credit, at the current SCCOE Housing Policy Facilities Rate per class for four classrooms housing the CCS MTU at Juana Briones beginning 2006-07.
- Sunnyvale SD will receive a credit for that amount per class for two classrooms housing the two CCS Satellites (one at Cherry Chase and one at Vargas) beginning 2006-07.
- The cost of transporting OI students confined to wheelchairs from LCI to district programs

**h) Funding for Services provided to students in hospitals, Juvenile Court Facilities**

- The cost of serving students who reside in hospitals shall be the responsibility of the district in which the hospital is located.
- The cost of special education services provided by SCCOE for students in Juvenile Court Facilities shall be charged to districts, based on usage of the program. See the section on SCCOE funding. Special

Education services for students in district-run Alternative Schools programs shall be the responsibility of the district.

**i) Balance to SELPA Level State Aid**

A countywide Fiscal Subcommittee was assembled in 2006-07 to analyze the practice of using SCCOE's Federal Local Assistance Grant as an offset to the cost of SCCOE Programs billed back to districts, and the effect of this use of Federal Local Assistance Revenue on the calculation of District Special Education Revenue in the SELPA Revenue Projection spreadsheets, line items "Balance to SELPA Level State Aid", and "Cost of SCCOE programs".

- Beginning in 2007-08, Federal IDEA Local Assistance was not allocated to SCCOE by prior year pupil count, as has been done in the past, and was no longer counted among the "Other Revenue Sources" that offset (reduce) the amount of charge-back to districts by usage. The amount of Local Assistance which would be allocated to SCCOE by the pupil count method, will instead, go to districts (by number of pupils in SCCOE Block Programs) and then, that same amount transferred to SCCOE, for partial payment, by actual usage of SCCOE programs. In this way, Federal Local Assistance Revenue to SCCOE will be used as a method of payment for actual usage of programs by districts, rather than an "off the top" subsidy. This method should not significantly change any district or SCCOE PERS reduction, or MOE calculation.
- Also beginning in 2007-08, the SCCOE column in each SELPA's Revenue Projection Spreadsheet, will no longer calculate an AB 602 Entitlement. By using the Federal IDEA Local Assistance, as an internal transfer of funds from districts to SCCOE for payment of services, by usage, and by allocating the SCCOE ASD ADA to districts within a SELPA, SCCOE will no longer accumulate an entitlement which previously needed to be adjusted in the "Balance to SELPA Level State Aid" line. The only amounts showing in the SCCOE column will be transfers from districts for actual payments by usage of SCCOE programs, and any separate entitlement for SCCOE Charter Schools. SELPA II will allocate the SCCOE ASD ADA by percentage of Special Education ASD ADA (by district of residence) within SELPA II.

**4. Inter-district Transfers:**

*It is the intent of the SELPA Budget Allocation Plans that Special Education Funding follows Services.*

**a) Inter-district Student Transfers (Based on Average Cost)**

Dependent upon mutual agreement between districts, the following model for the transfer of Special Education students between districts has been developed, reflecting the estimated average cost of providing Special Education services. A transfer reporting form may be completed by districts and submitted to the SELPA fiscal advisor. The transfer reporting form shall report services provided on December 1 and April 1 to non-district students. The SELPA office will record the information and adjust apportionment distribution to districts accordingly, based on the reporting forms. The cost of serving the transfer pupil will be subtracted from the District-of-Residence's Special Education Apportionment and added to the apportionment for the District-of-Service. (Appendix E)

Responsibility for providing Low Incidence Equipment to a Low Incidence qualified Inter-district transfer student shall, by agreement, fall primarily on the District-of-Residence.

For the complete list of agreements regarding responsible district in Inter-district transfer situations, please refer to the SELPA Inter-district Transfer Policy.

**b) Designated Regional Program Student Transfers (Based on Actual Costs)**

SELPA Regional Programs, in this context, refer to those programs designated by the SELPA as specialized, requiring full funding to safeguard their existence and operation for the benefit of the SELPA. The funding

model for transfer students will be used as the general method to establish costs on a per student basis, however, actual costs rather than average costs should prevail in this model. A listing of Actual Cost Reimbursement Regional Programs appears in the Inter-District Transfers section of this booklet.

**\*\*IMPORTANT NOTE\*\***

Districts in SELPAs I, II, III, IV and VII which serve students who reside in SECSE SELPA will contract independently with those districts in SECSE SELPA for Special Education Services provided. In these instances only, apportionments will not be adjusted for the transfers. Any transfer of funds must be made through invoicing and issuance of warrants.

**5. Summary of current SELPA II Regional Program Deficit Bill-backs (Note: see Appendix J for historical details):**

Districts in SELPA II have agreed that certain, designated costs for Regional Program Services will be cost-shared, specifically:

- 14.20 FTE Occupational Therapists, paid by Sunnyvale School District
- 1 Behavior Supervisor, 6 Behavior Specialists, paid by Sunnyvale School District
- CAP/ 0.5 Clinical Manager, 4 Supervisors (4 district employed), paid by Sunnyvale School District
- *New in 2019-20!* 0.40 FTE Occupational Therapist Lead, paid by Sunnyvale School District
- *New in 2019-20!* Other Occupational Therapist costs, including protocols and test kits paid by Sunnyvale School District
- Family and Children's Services contract to support TSDC, paid by Fremont Union High School District
- 2.9 FTE Program Specialist, paid by Fremont Union High School District
- Program Specialist Office Expenses, paid by Fremont Union High School District
- \$2,000 budget for Community Advisory Committee (CAC), to be initially paid by Fremont Union High School District
- *New in 2019-20!* 2.0 FTE Behavior Specialists, paid by Fremont Union High School District
- CAP/1 Clinical Manager, 11 Supervisors, paid by Cupertino Union School District
- VI Program, paid by Cupertino Union School District:
  - 4 TVI/O&M Teachers
  - 4 Paraeducators
  - Materials cost \$500 per teacher = \$2,000

*Note: See Appendix J for historical details*

These program costs are first offset by any regional revenue (Program Specialist revenue, NPS Pilot Program revenue, and shared base year OT revenue). The balance of the cost is shared by districts based on total K-12 ADA. The sharing of these costs appear on the SELPA II Revenue Projection Spreadsheets as line item adjustments to each district's apportionment.

**6. Calculation of SCCOE Funding:**

**a) Santa Clara County Office of Education (SCCOE) Special Education Block Rates**

The SCCOE programs have been given high priority for funding purposes. These programs are considered regional programs operated for students requiring very specialized services who reside in various districts within the six SELPAs in Santa Clara County. A "Building Block" model has been developed for the calculation of costs associated with these programs, and is included in Appendix F. Average salaries and costs were compiled as well as additional services required for the more intensive needs programs. The costs have been calculated for the **Foundation (Basic) Block** along with the costs for augmented services (building blocks) for the more intensive needs programs. Block rates have increased and/or been re-benched over the years, as detailed in the exhibits in the SCCOE section (Appendix F).

All county programs are based on an average ratio of one teacher to ten (1:10) students with the exception of the autistic program, which is built on a one to eight (1:8) ratio. The cost of the program (based on the

building block model) will be charged to each district according to the percentage of students that a district has in a specific block program for that year. The funding allocation for SCCOE students served in the base year (1997-98) has been adjusted back to districts of residence. Current Year charges will be deducted from the districts' allocation of County Excess Special Education Property Tax.

In 2012-13, Mental Health Services formerly provided by County Mental Health will need to be provided by other sources/agencies in 2012-13. If districts wish to use Mental Health Revenue for Mental Health Services in the ED Block, it will be possible to direct a portion of a district's MH funds to SCCOE in payment of the Mental Health component of the ED Block. Mental Health funds will not go directly to SCCOE (as an allocation), but only in payment of a district's obligation for the Mental Health component for SCCOE E.D. students. All blocks will increase slightly due to increased costs.

In prior years beginning in 2013-14, NW and SE SELPAs have used the December 1 and April 1 census dates, for calculating charges for SCCOE programs. However, effective 2017-18, NW and SE SELPAs will use the average of October to April (7x) block enrollment census dates in the calculation of charges for SCCOE programs.

Also in 2013-14 and 2014-15: CDE switched to LCFF (Local Control Funding Formula) from the Revenue Limit Funding model at P2 2013-14. Approximately \$7.5 million which SCCOE previously received from the County Office Revenue Limit Funds Transfer to help fund the SCCOE Special Ed Block Programs reverted to the Districts of Residence of those students sent to SCCOE Special Ed Block Programs. More Special Ed Revenue gets diverted to SCCOE within each SELPA for those students, to backfill the loss of the \$7.5 million in Revenue Limit, while Districts of Residence keep all of the unrestricted LCFF revenue for those students. See MOU and explanation, Section A-5 through A-7. County Office Funds Transfer MOU extended for 2016-17, and will be reviewed annually.

Re-benched block rates are presented to SELPAs annually. In 2019-20, SELPA II has approved to use the re-benched Block Rates. (See Appendix F on SCCOE Block Rates for details).

Any difference in revenues collected and actual cost of SCCOE programs, after closing the current year will be adjusted in the subsequent year. SCCOE may carry over a reserve of Special Education revenue, which does not exceed 2% of its Special Education Expenditures for the year, for the purpose of rate stabilization to districts. Any reserve in excess of 2% will be returned to districts on a rate-per-pupil-attending-SCCOE-programs basis.

The funding model for DIS services will be based on the actual salary and benefits plus travel for DIS staff, such as Visually Impaired, and Adaptive Physical Education. (VI Program has a recommended standard of 120 hours per teacher per month).

#### **b) Special Education Services in Alternative Schools**

Beginning in 2002-03, Special Education services for students in SCCOE Alternative School Programs are charged back to districts by usage, in a formula similar to the block formula described above. This process replaces the previous method of charging each SELPA a percentage of the cost for these services "off the top" of the SELPA funds. SELPA II has agreed to share the cost to districts in SELPA II of serving students in Special Education Programs in SCCOE Alternative Schools by total K-12 ADA rather than by individual district usage of the programs. Students can be enrolled in SCCOE Community Schools Programs only with a written agreement between the district and the SCCOE.

Beginning in 2013-14: With the P2 change to LCFF funding from Revenue Limit Funding, the amount of LCFF Base Funding received directly by SCCOE for Special Ed (SDC) in Court Schools ADA, will partially offset any costs to districts of residence for SCCOE Special Ed in Alt Ed.

**c) SCCOE Facilities Policy**

All SELPA Executive Councils in Santa Clara County have approved a policy to cover housing for programs operated by the SCCOE Special Education Department on district operated sites. Each school district has the responsibility for providing classroom space for the number of resident students enrolled in SCCOE Special Education programs. This housing policy specifies that when a district provides less space than its obligation, a housing fee will be added to the estimate of cost of SCCOE programs for that district. A housing compensation will be issued to the district in the form of a cash journal when district provides more space than its obligation. The SELPA facilities committee each year will recommend the value to be used in the calculation of the housing fee or compensation. (Appendix F)

Starting with 2016-17, the custodial and utilities costs incurred at the 5 "SCCOE New Construction Sites" will be removed from the blocks costs and put into Facilities costs. Another change to Facilities Policy is for district who provides space for SCCOE classroom, if they are unable to provide custodial, utilities and associated supplies, they will pay the actual cost for SCCOE to provide them.

SELPA II approved the 2019-20 SCCOE Special Ed Facilities Rates. Pending results of Facilities Study, conducted by the School Services of California, they agreed to use the same facilities rates used in 2018-19 (keep rates at status quo).

**d) SCCOE Special Ed Transportation**

SCCOE transports LCI (and similarly, SNF) residents to SCCOE programs. Districts transport LCI students to District Programs, with the one exception that the SELPA I cost of transporting wheelchair pupils from LCI to District Programs is rolled into the NW SELPAs LCI/SDC cost share. Starting 2009-10, SCCOE Special Ed covered the Transportation deficit. Future discussion will need to address payment of these costs as the Transportation deficit continues to rise.

**7. Maintenance of effort (E.C. 56841):**

Federal funds for special education should be used to supplement and not supplant state and local funds (E.C. 56841). The specifics of the federal regulations translate this into an MOE calculation, based on expenditures for special education (Sections 300.203-300.205 of Title 34 of the Code of Federal Regulations [CFR]).

The general rule under the MOE requirement is that LEAs must spend at least the same level of state and local funds (or local funds only) on special education as in the prior year, either in terms of total or per-capita expenditures. If an LEA fails this initial test, the federal regulations allow an exempt reduction Under 34 CFR Section 300.204:

- a. Voluntary departure, by retirement or otherwise, or departure for just cause, of special education or related services personnel.
- b. A decrease in the enrollment of children with disabilities.
- c. The termination of the obligation of the agency to provide a program of special education to a particular child with a disability that is an exceptionally costly program, as determined by the SEA, because the child:
  - i. Has left the jurisdiction of the agency;
  - ii. Has reached the age at which the obligation of the agency to provide free appropriate public education (FAPE) to the child has terminated;
  - iii. No longer needs the program of special education.
- d. The termination of costly expenditures for long-term purchases, such as the acquisition of equipment or the construction of school facilities.
- e. The assumption of cost by the high cost fund operated by the SEA under 34 CFR Sec. 300.704(c).

The eligibility standard in Section 300.203(a) requires that, in order to find an LEA eligible for an IDEA Part B subgrant for the upcoming fiscal year, the CDE must determine that the LEA has budgeted for the education of children with disabilities at least the same amount of local, or state and local funds, as it actually spent for the education of children with disabilities during the most recent fiscal year for which information is available.

The compliance standard in Section 300.203(b) prohibits LEA from reducing the level of expenditures for education of children with disabilities made by the LEA from local, or state and local, funds below the level of those expenditures from the same source for the preceding fiscal year.

Beginning 2016, MOE for LEAs must meet the “subsequent-year rule” where if an LEA fails to meet the MOE test in one year, the LEA is required in subsequent fiscal years to maintain effort at the level prior to the failure. Thus, the LEA must calculate its level of effort on the most recent fiscal year in which the MOE test was met.

In order to receive and keep Federal IDEA Funding:

- If the SELPA fails to pass the SEMB (Budget) software test, no Federal IDEA funds will flow to the SELPA in the current year.
- If the SELPA fails to pass the SEMA (Actuals) software test, the amount that the SELPA is short of meeting the requirement, will be returned to the CDE. Those LEAs which failed to meet the MOE requirements in the Actuals to Actuals test will be responsible for the loss. The amount recovered by the CDE will be deducted from the revenue received by those districts.
- If the SELPA passes, but a district fails to meet MOE, federal IDEA funds will be redistributed within the SELPA pursuant to SELPA policy.

**8. Charter School Policy – Excerpts related to fiscal issues:**

Funding for special education services, participation in the governance structure and responsibility for provision of services shall be based on the categorization of the individual Charter School (operating as a public school of its chartering entity or functioning as an LEA). Schools chartered by a LEA shall negotiate their charter and MOU with the school district from which they are seeking the charter. Charter schools may also elect to be deemed a Local Educational Agency (LEA) by providing verifiable written assurances that the Charter School will participate as a LEA in a SELPA for purposes of the provision of special education services.

- a) **Public School within a District** will participate in the State and Federal funding in the same manner as other schools within the chartering district. The chartering district will be responsible for ensuring that all children with disabilities enrolled in the Charter School receive special education and related services in a manner that is consistent with all applicable provisions of State and Federal law. The district will be responsible for funding appropriate special education services in the Charter School, even though the student may live anywhere in the State of California. The district and Charter School may enter into agreements whereby the Charter School is billed for excess costs associated with providing special education services to identified students, including the administration of special education programs. The Charter School may also be held fiscally responsible through the MOU for a fair share of any encroachment on the district's general fund that is created by the provision of special education services throughout the district.
- b) **Public School within the County Office** will participate in the State and Federal special education funding in the following manner: (1) the SELPA where the charter school is located will distribute special education funding to the SCCOE pursuant to the SELPA Budget Allocation Plan; (2) the SCCOE will use these funds to fund the actual cost of special education services provided by the Charter School up to the total amount generated; (3) any unused funds will be returned to the SELPAs in the same proportion in which they were received. The SCCOE and the Charter School may enter into agreements whereby the Charter School is billed for excess costs, based on the SELPA-Wide average rate of local support per ADA associated with the provision of special education services to identified students, including the administration of special education programs.
- c) **Charter School as a LEA within the SELPA** A Charter School may apply to become a LEA for the provision of special education services. Application must be made to the respective SELPA by February first of the school year preceding the school year in which the Charter School anticipates operating as a LEA within the SELPA. The Executive Council of Superintendents will determine whether the Charter School has provided the requisite assurances. Once deemed a LEA, the Charter School, like all other members of

the SELPA will...receive State and Federal funding for the special education in the same manner as other districts within the SELPA...be responsible for all costs incurred in the provision of special education services.

SCCOE Charter Schools within the SELPA will receive the same AB 602 Entitlement per ADA as the equalized districts within the SELPA.

Beginning 2017-18, SELPA II agreed that unused funds from Spark Charter School will be distributed to Sunnyvale and Cupertino by districts' total ADA. Spark Charter School closed effective June 30, 2018.

For the complete SELPA Charter School Policy, please refer to SELPA Policy and Procedures Manual.

**9. Interest on SELPA Pass-through Revenues:**

Distribution to districts of interest accrued on SELPA revenues will be calculated as a percentage of district Special Education State Aid to total Special Education State Aid distributed to all districts by the SELPA AU, at the end of any fiscal year.

**10. Amendment to Prior Year Budget Allocation Plan:**

None.

**11. District Financial Reports for the Budget year: as required,**

By SACS goal and function are summarized in the MOE Reports by district and by SELPA, and will be kept at the SELPA AU and be available to the public. The Annual Budget Plan as required by E.C. 56205, appears in this document, Appendix D.

**12. SELPA AU Fiscal Responsibility to districts in SELPAs I, II, III, IV and VII:**

- a) Apportionment (Sp. Ed. State Aid) calculation and distribution
- b) County Special Ed (Excess Tax) Calculation and distribution
- c) Federal IDEA Part B Grant Calculation, Distribution and Expenditure reports
- d) Low Incidence
- e) Fiscal Record keeping per (E.C. 56195.7)
- f) Apportionment adjustments for MOUs, Inter-district transfers within five SELPAs and SCCOE program costs.
- g) Apportionment adjustments for LCI/MTU Cost-sharing
- h) Prior Year apportionment adjustments, and distribution of any carryover funds at year end
- i) Distribution of Interest on SELPA Pass-through funding
- j) Annual preparation/distribution to districts of SELPA Fiscal Documentation:
  - o SELPA Budget Allocation Plan
  - o SELPA Year End Closing, Calculations for revenue distribution
  - o SELPA MOE reporting

**13. SCCOE Special Ed Department Fiscal Responsibilities:**

- a) With the fiscal separation of SELPAs V and VI in 2001-02, SCCOE per agreement will complete the infant and NPS/LCI "J-50" reports for the CDE
- b) Completion of Part C Federal Grant Applications and Expenditure Reports
- c) Prepares estimate of increase in students and classes for subsequent year
- d) Provides Block Enrollment information
- e) Provides 1:1 Aide use information



#### **14. Hughes Bill Mandate Settlement:**

In response to legislation (AB 2586 Hughes Bill), the State Board of Education in 1993 adopted regulations requiring LEAs to develop BIPs (Behavior Intervention Plans) for special education students who exhibit serious behavioral problems. The regulations imposed detailed and costly requirements that exceed federal law. Test Claim CSM-4464 was tied up in the mandate reimbursement process and in the courts for over 14 years. A settlement was finally reached with Education Legal Alliance, working on behalf of San Diego USD and Butte and San Joaquin COEs. CSBA and the Education Legal Alliance had responsibility for securing approval of the proposed settlement. In order for the settlement to take effect, 85 percent of LEAs representing 92 percent of the statewide ADA had to waive their rights to file additional mandated cost claims on the current Hughes Bill statute and regulations. Resolutions and waivers were taken to School Boards for approval and returned to CSBA in February 2009. The Settlement is currently awaiting legislation AB 661 (Torlakson) to implement. Estimated payment schedule is included, for reference, should the Mandate Settlement be implemented through legislation. At this writing, the Hughes Bill Mandate Settlement (on-going increase to AB 602 Base Rates) is not yet included in Special Ed Revenue Projections from SELPA AU, following advice of School Services. Funding for the Mandate was not included in the 2009-10 State Budget, and indications are that it would be difficult to fund, given the current State Fiscal Crisis. Still no Funding in 2010-11, and 2011-12, and 2012-13.

Districts filed Hughes Bill Mandated Cost Prior Years Reimbursement Claim forms with CDE in 2013/2014. Still no funding has been appropriated to pay claims in 2013-14.

The BIP mandate is the focus of a CSBA lawsuit challenging the State's failure to pay what has already been determined to be a reimbursable cost. They are working on their submission to the court, hoping to overturn the statute requiring that special education apportionments offset districts' BIP claim. (*Per inquiry from School Services of California, February 2015*)

The \$4 billion owed to schools for unpaid mandate claims is part of the "wall of debt" and includes BIP. The Governor's Budget proposes to provide about \$180/ADA in unrestricted funds in 2015-16 to all local education agencies, including charter schools. The Budget also proposes that for LEAs with outstanding mandate claims, the dollars received be counted against their claims.

#### **15. Parentally-Placed Student in Private School:**

The LEA where the parentally-placed children with disabilities in private schools are **located** is responsible for child find and providing special education and related services. LEAs must use a proportionate share of their Individuals with Disabilities Education Act (IDEA) 611, Part B funds, Resource 3310 to provide special education and related services to parentally-placed children with disabilities enrolled in private schools and who attend private schools **located** in the LEA. There is no exception for out-of-state parentally-placed children with disabilities attending private schools located in the LEA. Therefore, out-of-state parentally-placed children with disabilities must be included in the group of parentally-placed children with disabilities whose needs are considered in determining which parentally-placed private school children with disabilities will be served and the types and amounts of services to be provided.

#### **16. Excess Cost Calculation:**

Amounts provided to an LEA under Part B of the Act may be used only to pay the excess costs of providing special education and related services to children with disabilities. Excess costs are those costs for the education of an elementary school or secondary school student with a disability that are in excess of the average annual per student expenditure in an LEA during the for an elementary school or secondary school student, as may be appropriate. An LEA must spend at least the average annual per-student expenditure on the education of an elementary school or secondary school child with disability before funds under Part B of the IDEA are used to pay the excess costs of providing special education related services.



**APPENDIX A**  
**MEMORANDUM OF UNDERSTANDING (MOU) BETWEEN SELPAs**

1. MOU # 1 – COE Operations in Base Year Calculations
2. MOU # 2 – J-50 “Maximization” in Base Year Calculations
3. MOU with SE SELPA regarding LCI Cost-Sharing
4. Santa Clara County Office Funds Transfer for Special Education ADA under LCFF



## Santa Clara County Office of Education (SELPAs I - VII)

### Memorandum of Understanding #1

#### COE Operations in Base Year Calculations (March, 2000)

Implementation in 98/99 of the new Special Education Funding Formula mandated by AB 602, illuminates some critical issues which would be best served by written policy agreement between all SELPAs.

#### Background

County Office of Education Special Education programs were, under the J-50 Funding Model (which ended in fiscal year 97/98), reported in SELPA III. AB 602 specifies a formula for determining SELPA revenue for all future years according to the revenue which was generated by district J-50's within the SELPA in the base year (97/98). The AB 602 formula provides a means to adjust revenue back to SELPA of residence in the base year for all unit transfers between SELPAs. There are, however, some elements of County Office Special Education Funding which cannot be adjusted to SELPA of Residence via the unit transfer formula. This revenue remains in SELPA III, but clearly does not belong solely to the districts in SELPA III. It is the amount and disposition of this revenue which is being addressed in this document.

**1) The 24.27 Frz Units in SELPA III** identified by Paul Goldfinger, of School Services as funding for COE programs which serve all of the districts in the county. This is over and above what would be considered SELPA III's share of COE funding based on pupils in COE programs.

Revenue transfer from SELPA III Base Funding	<b>\$2,040,125</b> (transfer to COE)
18.45 SDC 1 Aide x \$89,516 = \$1,651,570	
5.82 DIS x \$66,762 = \$388,555	
Calculated at CDE posted Transfer Rates	

**2) COE Base Year (97/98) Extended Year Funding** **\$3,039,659** (transfer to COE)

Revenue transfer from SELPA III Base Funding  
From 97/98 Annual J-50 COE SELPA III


<b>3) COE NPS/NPA Column A, B Base Year Reimbursements</b>	<b>\$ 952,300</b> (transfer to COE)
base yr SELPA II OT Louise Faulker contract reimbursement	<b>\$ 50,050</b> (transfer to SELPA II Reg.Serv)
base yr SELPA III OT Pediatric Interv. contract reimbursement	<b>\$ 103,690</b> (transfer to SELPA III Reg.Serv)
Revenue transfer from SELPA III Base Funding	<b>\$ 1,106,040</b>
From 97/98 Annual J-50 COE SELPA III	

<b>4) COE Alternative Schools Grant</b>	<b>\$116,625</b>
<b>Total</b>	<b>\$6,302,449</b>

#### Policy Agreement

By agreement of all seven SELPA Executive Councils, **\$6,148,709**, which is included in the base funding of SELPA III, will be transferred from SELPA III to the COE to fund programs serving all districts in Santa Clara County. This transfer of **\$6,148,709 (less deficit)** will occur every year. The COE will calculate the cost of operating Special Education Programs and the above amount will be transferred to the COE to partially fund those programs. These revenues will be used to offset the final cost of COE programs which will be charged to districts based on actual usage of those programs. In addition **\$50,050** will be transferred from SELPA III's base funding to SELPA II's Regionalized Services Budget, and **\$103,690** will be transferred from SELPA III's base funding to SELPA III's Regionalized Services Budget, as indicated above. These latter two amounts were paid with SELPA Regionalized Services funds and reported and reimbursed through the COE's J-50 (in SELPA III) in the base year.

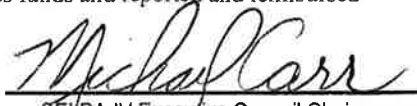
  
SELPA I Executive Council Chairperson

  
SELPA II Executive Council Chairperson

  
SELPA III Executive Council Chairperson

**To be signed  
following final  
certification and  
review of 97/98  
Base Year figures**

  
SELPA VII Executive Council Chairperson

  
SELPA IV Executive Council Chairperson

\_\_\_\_\_  
SELPA V Executive Council Chairperson

\_\_\_\_\_  
SELPA VI Executive Council Chairperson



## Santa Clara County Office of Education (SELPAs I - VII)

### Memorandum of Understanding #2

#### MAXIMIZATION in Base Year Calculations (March, 2000)

Recertification of the AB 602 Base Year J-50s (97/98) in February of 2000, revealed an uneven distribution among the seven SELPAs of the gains realized by Paul Goldfinger's (School Services) Countywide Maximization of Revenues.

#### Background

The Paul Goldfinger "Maximization" of Revenue for fiscal year 97/98 generated a prior year adjustment of \$1,997,738 in shared gain for Santa Clara County. An additional \$203,852 was generated as a result of specific operational changes to district J-50s. As in past practice the shared \$1,997,738 gain will be distributed to districts based on pupil count, see attached schedule, as a one-time prior year adjustment in 99/00. The \$203,852 will go to the districts which generated those funding changes by correcting the reporting of their operations for that year.

#### Maximization in the Base Year of AB 602 funding

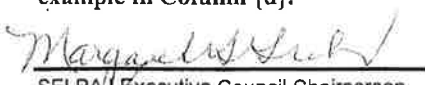
Because 97/98 is the Base Year for calculation of all future SELPA funding under AB 602, it is important to look at the fair distribution of this shared Countywide increase in funding as it rolls into the SELPA base rates. When the Maximized J-50s were rolled into the SELPA Base Rates by the California Department of Education, the gain from Maximization fell unevenly among the seven SELPAs.


#### Inter-SELPA apportionment adjustments to fairly distribute the Maximized Base Year Revenue to all SELPAs

	{a}	{b}	{c}	{d}
	Base Year 97/98 Maximization Distribution by Pupil Count	Actual amount rolled into SELPA Bases by CDE AB 602 formula	Difference	Adj Entry in 99/00 Difference times 99/00 Base Proration 0.9599306091
SELPA I	182,387	135,049	47,338	45,441
SELPA II	213,902	144,910	68,992	66,228
SELPA III	309,520	(101,081)	410,601	394,148
SELPA IV	255,921	(293,011)	548,932	526,937
SELPA V	758,002	1,882,725	(1,124,723)	(1,079,656)
SELPA VI	156,993	315,909	(158,916)	(152,548)
SELPA VII	121,012	(86,816)	207,828	199,500
Totals	1,997,737	1,997,685	52	50

#### Policy Agreement


By agreement of all seven SELPA Executive Councils, \$1,997,738, representing the net shared benefit of Countywide Maximization of 97/98 Base Year Revenue, will be adjusted each year, beginning with 98/99 to roll the original distribution by pupil count into each of the SELPA Bases. For the purpose of Revenue Projection, the full amount in Col. {a} will appear in the SELPA Appendix B Base Year calculation, line #3. For each current year adjustment of revenue, the amount in Column C will be multiplied times that current year base entitlement proration factor, example in Column {d}.


  
SELPA I Executive Council Chairperson

  
SELPA II Executive Council Chairperson

  
SELPA III Executive Council Chairperson

**To be signed  
following final  
certification and  
review of 97/98  
Base Year figures**

  
SELPA VII Executive Council Chairperson

  
SELPA IV Executive Council Chairperson

SELPA V Executive Council Chairperson

SELPA VI Executive Council Chairperson

# Santa Clara County Office of Education

## Memorandum of Understanding Between Santa Clara County Office of Education SELPA and the South East Consortium for Special Education SELPA

The Administrative Units of the SELPAs in Santa Clara County have met to determine Agreements concerning the funding of Non-Public Schools and Licensed Children's Institutions (LCI) in the County. Items to be addressed herein include revenue and expenses in 2009/10 and carryover dollars from the current NPS/LCI account.

The SELPAs agree that:

The revenue and expenses will continue in 2009/10 to be based on income as charted over time, including the revenues from bed count, revenue limits for NPS/LCI, and any forthcoming adjustments from CDE. Costs from those funds will continue to be for NPS/LCI tuition and actual costs of serving any SNF students.

To provide an insurance that no district or AU will be hurt this year unexpectedly and the carryover dollars of \$673,553 will be used to balance costs in 09/10. If there is any remaining balance, the balance will be distributed by ADA to the AUs to use as they see fit. If excess costs in both AUs exceed revenue and the carryover, those costs will also be split by collecting the difference on an ADA basis. If only one AU has a deficit beyond the carryover, that AU will be responsible for the difference.


For the future, beginning in 2010/11, earned income will continue to be from the current sources, but will be separated by AU for each group's costs.

  
Marc Liebman, Superintendent, Berryessa SD

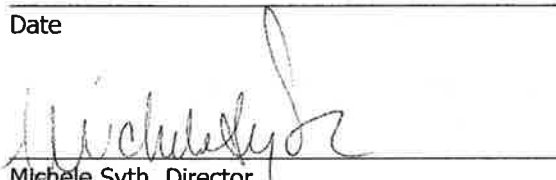
2.3.10  
Date

  
Rhonda Farber, Superintendent, Campbell UHSD

2-11-10  
Date

  
Nancy Birenbaum, Director,  
South East Consortium for Sp ED  
SELPA XI

2/9/10  
Date

  
Michele Syth, Director,  
Santa Clara County Office of Education SELPA  
SELPAs I, II, III, IV and VII

2-9-10  
Date

**County Office Funds Transfer (formerly Revenue Limit),  
for SCCOE Special Education ADA under LCFF**  
(District-funded pupils attending County Office Special Education Programs)

In March of 2014, SCCOE held a countywide meeting to address the issue of the discontinuance of the County Office (Revenue Limit) Funds Transfer under the new LCFF funding formula. CDE had requested that each County Office develop its own agreement with districts sending pupils to County Office Programs, to fill the funding gap for County Office programs no longer receiving the Revenue Limit funding for Sp Ed pupils served. One great difficulty in developing an agreement was the complexity and variation between districts of the LCFF Base and LCAP-Supplemental and Concentration Grant formula. Some counties developed elaborate calculations for moving LCFF funds from district of residence to the County Programs where those students were served. **In our county, districts in each SELPA signed an MOU, saying that for 2013/2014 and 2014/2015, Districts-of-Residence would keep the LCFF funds generated by the COE Sp Ed ADA, but more Sp Ed revenue within each SELPA would follow those pupils from District-of-Residence to COE to make up for the loss of Revenue Limit funding for those students. As a result, Districts-of-Residence of SCCOE pupils receive less Sp Ed revenue, but keep more unrestricted LCFF funds. Total revenue to COE for serving Sp Ed pupils is unchanged by this agreement.**

As 2013/2014 came to an end, the California Department of Education began posing questions as to whether we should be looking at a consistent approach to this issue statewide. When the new **Principal Apportionment Data Collection** software came out in December, 2014, CDE offered a new **OPTION**. In reporting attendance: **If both** District and COE agree and each selects the **OPTION** in reporting P1 Attendance, and COE provides an agreed-upon dollar amount to transfer (for each district), CDE will then do an automatic LCFF funds transfer from the district to the County Office in 2014/2015. This option can only be designated at P1, and will be available for selection annually at P1. The P1 2014/2015 attendance reporting deadline was January 15, 2015. If no selection was made under this **OPTION**, no automatic transfer of LCFF funds from District-of-Residence to COE will happen in 2014/2015.

**After careful review, it was the recommendation of SCCOE and the SELPA Administrative Units that for 2014/2015, we abide by our MOU through this year, and do not select this **OPTION** in 2014/2015**

**Memorandum of Understanding between Santa Clara County Office of Education  
and Santa Clara County School Districts**

**For District-funded pupils attending Santa Clara County Office of Education  
Special Education Programs under Local Control Funding Formula**

Background:

Beginning in July 2013, the State of California implemented a new funding model for education of students in public schools. This model is known as Local Control Funding Formula (LCFF). As a result of this model, some significant changes were made in the funding of programs operated by county offices of education.

Prior to July 2013, Revenue Limit for ADA for students with disabilities who attended county programs was diverted at state level and sent directly to the county offices of education as the general education share of the cost of county special education programs. This funding stream was known as County Office Revenue Limit Transfer (RLT). Under LCFF, this funding stream from the California Department of Education (CDE) to county Offices no longer exists. Instead, the funding for the Santa Clara County Office of Education Special Education programs (SCCOE) ADA will go directly to the resident school districts.

For the fiscal year 2013-2014, even though the LCFF model was in place, appropriations were made based upon the previous funding model. The Revenue Limit Transfer money was sent directly to the county offices of education, just as it had been done in the past. As the California Department of Education (CDE) and districts begin to actually implement LCFF at the P2 certification of 2013/14, reconciliations in the funding streams will need to be made before year end closing. Therefore, the Revenue Limit Transfer funding stream will be returned to districts of residence. However, these (approximately \$7.5 million) Revenue Limit Transfer dollars were committed toward the operation of the county special education programs.

Purpose:

It is the purpose of this Memorandum of Understanding (MOU) to resolve two issues in regards to funding special education programs in Santa Clara County Office of Education.


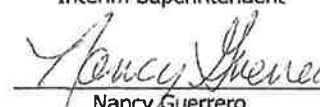

- a) For 2013-2014, resolve the issue of the Revenue Limit Transfer dollars that were sent directly to Santa Clara County Office of Education (SCCOE) under the old funding formula and will now be redistributed to school districts (LEAs) at the end of the fiscal year at the state level.
- b) For 2014 -2015, resolve the issue of how to fund, under LCFF, the Special Education programs that are operated by the SCCOE.



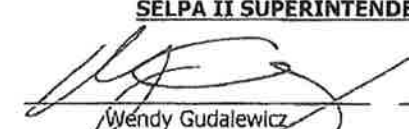
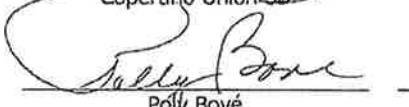
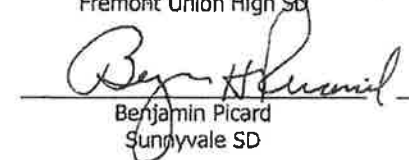
Agreements:

- 1) For the 2013 – 2014 fiscal year, the Revenue Limit Transfer dollars continue going to SCCOE through the Advance Apportionment until the California Department of Education certifies LCFF funding for the first time at the P2 certification of 2013/14 in July 2014. After the P2 apportionment certification in July 2014 as the fiscal year is closing, CDE will redistribute the RLT funds as LCFF funds, taking them back from SCCOE and distributing them to districts of residence. South East Consortium and North West Santa Clara County SELPA Administrative Units (AUs) will adjust Special Education revenue distributions so that a recalculated amount (i.e., an amount including the approximately \$7.5 million RLT) will be transferred from LEAs to SCCOE for the cost of students attending Santa Clara County Office of Education Special Education programs.
- 2) For the 2014 -2015 fiscal year, Southeast Consortium and North West Santa Clara County SELPA AUs will adjust Special Education Revenue distribution from LEAs and transfer that amount to SCCOE for students attending SCCOE Special Education programs.
- 3) SCCOE will provide a general description of services provided to SCCOE Special Education pupils that can be referenced by all districts in their Local Control and Accountability Plans. (LCAP).

**AUTHORIZED SCCOE AGENTS:**

 Mary Ann Dewan Interim Superintendent	<u>5/16/14</u> Date
 Nancy Guerrero Special Education Director	<u>6/27/14</u> Date
 Beth Majchrzak SELPA Director	<u>5/16/14</u> Date

**SELPA II SUPERINTENDENTS**

 Wendy Gudalewicz Cupertino Union SD	<u>5/16/14</u> Date
 Polly Bové Fremont Union High SD	<u>5/22/14</u> Date
 Benjamin Picard Sunnyvale SD	<u>5/30/14</u> Date

**Amendment to the Memorandum of Understanding  
between Santa Clara County Office of Education and Santa Clara County School Districts**

**For District-funded pupils attending Santa Clara County Office of Education Special Education Programs under Local Control Funding Formula**

**Agreement:**

Southeast Consortium and North West Santa Clara County SELPA AUs will adjust Special Education Revenue distribution from LEAs and transfer that amount to SCCOE for students attending SCCOE Special Education programs. **Districts of Residence will receive and keep LCFF funds for Special Education students attending the SCCOE Block Programs.** This agreement shall be renewed annually unless an overriding policy is enacted by the California Department of Education.

## **APPENDIX B**

### **CALCULATION OF APPORTIONMENT DISTRIBUTION**

Following is a summary documentation of the following:

1. Preliminary Special Education Revenue Projection for Districts

## FORMULA FOR CALCULATING DISTRICT SPECIAL EDUCATION STATE APPORTIONMENT

### CALCULATION:

Total SELPA ENTITLEMENT	
Plus	COLA,
Plus/Minus	GROWTH/DECLINING ADA,
Equals	SUBTOTAL ENTITLEMENT,
Minus	LOCAL SPECIAL ED PROPERTY TAX ALLOCATION TO DISTRICT,
Minus	APPLICABLE EXCESS ERAF ALLOCATION TO DISTRICT,
Plus/Minus	INTER-DISTRICT TRANSFERS IN/OUT,
Equals	STATE SPECIAL EDUCATION APPORTIONMENT TO DISTRICT (BEFORE DEFICIT FACTOR)*

\*To the extent the SELPA apportionments are deficated by CDE; district apportionments will also be deficated.

**SELPA II: 2019-20 REVENUE PROJECTION  
BUDGET DEVELOPMENT**

S2

5/21/19 May Revised - COLA

	FREMONT	NPS PILOT	SUNNYVALE	MONTEBELLO	CUPERTINO	COE	SELPA AU (TAKEN OUT OF PS/RS)	SPARK CHARTER	BASE YEAR MAXIMIZATION	TOTALS
<b>2017-18 CALCULATIONS ANNUAL</b>										
BEGINNING ENTITLEMENT	5,232,139.40	670,964.14	3,135,825.73	-	9,068,350.84	-	219,249.59	87,336.06	(68,992.00)	18,344,873.78
ADJUST FOR SELPA AU (\$6.62 PER ADA)	(3,793.27)	-	(2,226.09)	-	(6,204.45)	-	12,308.37	(84.56)	-	0.00
ADJ BEG ENTITLEMENT	5,228,346.13	670,964.14	3,133,599.65	-	9,062,146.39	-	231,557.97	87,251.50	(68,992.00)	18,344,873.78
COLA - 2.56% OR \$8.3098135809 PER PY ADA	87,612.28	-	52,509.46	-	151,849.71	-	-	1,462.44	-	293,433.89
GROWTH AT \$540.9901713306	128,360.74	-	4,100.71	-	(346,471.75)	-	-	34,807.31	-	(179,202.99)
GROWTH RECONCILIATION WITH CDE	13,243.53	-	7,771.98	-	21,661.76	-	-	295.24	-	42,972.51
EQUALIZATION ADJ WITHIN SELPA	(12,360.90)	-	(2,458.28)	-	17,245.63	-	-	(2,426.45)	-	0.00
ADJUSTED BASE ENTITLEMENT	5,445,201.78	670,964.14	3,195,523.52	-	8,906,431.75	-	231,557.97	121,390.04	(68,992.00)	18,502,077.19
BASE RATES PER ADA	505.10	-	505.10	-	505.10	-	6.62	505.10	-	505.10
BASE RATE EQUITY	-	-	-	-	-	-	-	-	-	-
\$ NEEDED FOR EQUITY	-	-	-	-	-	-	-	-	-	-
2017-18 EST (AT 2017-18 P2 ADA)	10,762.51	-	6,326.55	-	17,633.10	-	17.99	240.33	-	34,980.48
2017-18 EST (AT 2017-18 P2 COE ASD ADA) (ALLOCATED TO DISTRICTS)	17.99	-	-	-	-	-	(17.99)	-	-	-
TOTAL EST ADA	10,780.50	-	6,326.55	-	17,633.10	-	-	240.33	-	34,980.48
<b>2018-19 CALCULATIONS P-1</b>										
BEGINNING ENTITLEMENT	5,445,201.78	670,964.14	3,315,699.66	-	8,907,645.65	-	231,557.96	0.00	(68,992.00)	18,502,077.18
ADJ FOR PY PROGRAM SPECIALISTS /REGIONALIZED SERVICES	5,127.31	(309,400.14)	40,452.84	-	(68,652.96)	-	(231,557.96)	0.00	-	(564,030.91)
ADJUSTED BEGINNING ENTITLEMENT	5,450,329.09	361,564.00	3,356,152.50	-	8,838,992.69	-	(0.00)	0.00	(68,992.00)	17,938,046.28
COLA - 2.71% OR \$14.2393890679 PER PY ADA	153,507.73	-	93,474.13	-	251,118.79	-	-	0.00	-	498,100.66
GROWTH AT \$539.6781000593	(16,492.56)	-	78,479.99	-	(351,012.03)	-	-	-	-	(289,024.61)
GROWTH RECONCILIATION WITH CDE	37,152.76	-	22,367.71	-	58,693.71	-	-	-	-	118,214.19
EQUALIZATION ADJ WITHIN SELPA	24,045.58	-	(149,785.74)	-	125,740.17	-	-	(0.01)	-	(0.00)
ADJUSTED BASE ENTITLEMENT	5,648,542.60	361,564.00	3,400,688.58	-	8,923,533.33	-	(0.00)	(0.00)	(68,992.00)	18,265,336.51
BASE RATES PER ADA	525.45	-	525.45	-	525.45	-	(0.00)	-	-	525.45
BASE RATE EQUITY	0.00	-	0.00	-	0.00	-	-	-	-	-
\$ NEEDED FOR EQUITY	0.00	-	0.00	-	0.00	-	-	-	-	0.00
2018-19 EST	10,732.06	-	6,471.97	-	16,982.69	-	17.88	-	-	34,204.60
2018-19 EST (COE ASD ADA) (ALLOCATED TO DISTRICTS)	17.88	-	-	-	-	-	(17.88)	-	-	-
TOTAL EST ADA	10,749.94	-	6,471.97	-	16,982.69	-	-	-	-	34,204.60
<b>2019-20 PROJECTIONS</b>										
BEGINNING ENTITLEMENT	5,648,542.60	361,564.00	3,400,688.60	-	8,923,533.33	-	(0.00)	(0.00)	(68,992.00)	18,265,336.53
ADJ FOR PY PROGRAM SPECIALISTS /REGIONALIZED SERVICES	-	-	-	-	-	-	-	-	-	-
ADJUSTED BEGINNING ENTITLEMENT	5,648,542.60	361,564.00	3,400,688.60	-	8,923,533.33	-	(0.00)	(0.00)	(68,992.00)	18,265,336.53
COLA - 3.26% OR \$17.5935060619 PER PY ADA	189,129.13	-	113,864.64	-	298,785.08	-	-	-	-	601,778.84
GROWTH AT \$558.35096232131	-	-	-	-	-	-	-	-	-	-
GROWTH RECONCILIATION WITH CDE	(123,871.74)	-	(74,576.62)	-	(195,691.82)	-	-	-	-	(394,140.17)
EQUALIZATION ADJ WITHIN SELPA	-	-	-	-	-	-	-	-	-	-
ADJUSTED BASE ENTITLEMENT	5,713,800.00	361,564.00	3,439,976.63	-	9,026,626.57	-	(0.00)	(0.00)	(68,992.00)	18,472,975.19
BASE RATES PER ADA	531.52	-	531.52	-	531.52	-	-	-	-	531.52
BASE RATE EQUITY	(0.00)	-	0.00	-	(0.00)	-	-	-	-	-
\$ NEEDED FOR EQUITY	(0.00)	-	0.02	-	(0.01)	-	-	-	-	0.00
2018-19 EST	10,732.06	-	6,471.97	-	16,982.69	-	17.88	-	-	34,204.60
2018-19 EST (COE ASD ADA) (ALLOCATED TO DISTRICTS)	17.88	-	-	-	-	-	(17.88)	-	-	-
TOTAL EST ADA	10,749.94	-	6,471.97	-	16,982.69	-	-	-	-	34,204.60
ESTIMATED EXCESS TAX	3,629,438.00	-	2,682,706.00	-	4,822,146.00	-	-	-	-	11,134,290.00
COE SPED COST - (TRANSFER OUT TO COE)	(1,581,139.18)	-	(672,413.14)	-	(1,659,536.14)	-	3,913,088.46	-	-	-
COE AED SPED COST - (TRANSFER OUT TO COE)	(54,675.16)	-	(32,917.02)	-	(86,375.49)	-	173,967.67	-	-	-
NET EXCESS PROPERTY TAX	1,993,623.66	-	1,977,375.84	-	3,076,234.37	-	4,087,056.13	-	-	11,134,290.00
EXCESS ERAF PROPERTY TAX	750,538.49	0.00	2,561,136.19	-	4,046,441.52	-	0.00	0.00	0.00	7,358,116.20
EXCESS ERAF PROPERTY TAX TO COE	-	-	-	-	-	-	-	-	-	-
NET EXCESS ERAF PROPERTY TAX	750,538.49	-	2,561,136.19	-	4,046,441.52	-	-	-	-	7,358,116.20
2018-19 EST FROM 2017-18 INTERDISTRICT (IN- WITH AVE DEC1/APR1 ENROLLMENT	-	-	-	-	174,472.00	-	-	-	-	174,472.00
2018-19 EST FROM 2017-18 INTERDISTRICT (OUT)-WITH AVE DEC1/APR1 ENROLLMENT	(106,821.00)	-	(114,601.00)	-	(2,611.00)	-	-	-	-	(224,033.00)
DEFICIT BILL-BACK INTO DISTRICTS FOR REGIONALIZED SERVICES	(108,660.17)	-	2,809,439.84	-	2,008,047.00	-	-	-	-	4,708,826.67
DEFICIT BILL-BACK OUT FM DISTRICTS FOR REGIONALIZED SERVICES	(1,479,906.33)	-	(890,973.29)	-	(2,337,947.05)	-	-	-	-	(4,708,826.67)
SUBTOTAL	(361,564.00)	361,564.00	(0.00)	-	0.00	-	(0.00)	(0.00)	(68,992.00)	(68,992.01)
NPS PILOT & PROG SPECIALIST	361,564.00	(361,564.00)	-	-	-	-	-	-	-	-
BALANCE TO SELPA APPORT	-	-	-	-	-	-	-	-	-	-
SUBTOTAL STATE AID	(0.00)	-	(0.00)	-	0.00	-	(0.00)	(0.00)	(68,992.00)	-
DEFICIT	-	-	-	-	-	-	-	-	-	-
NET ESTIMATED SPED STATE APPORTIONMENT	(0.00)	0.00	(0.00)	-	0.00	-	(0.00)	(0.00)	(68,992.00)	(68,992.01)
EST. TOTAL 3 SOURCES OF REVENUE	2,744,162.15	-	4,538,512.02	-	7,122,675.90	-	4,087,056.13	-	(0.00)	18,423,414.19
DEFICIT FACTOR	0%	-	-	-	-	-	-	-	-	-
<b>OUTSIDE OF AB 602 CALCULATION</b>										
LOCAL ASSISTANCE ESTIMATES 2018-19	1,683,588.00	-	1,284,320.00	-	2,919,722.00	-	5,887,630.00	-	EST GRANT	5,887,630.00
PORTION PAYING FOR COE PROGRAMS	(34,230.00)	-	(16,108.00)	-	(42,285.00)	-	92,623.00	-	PER ADA	172.13
NET TO LEA	1,649,358.00	-	1,268,212.00	-	2,877,437.00	-	92,623.00	-	PER PUPIL	1,917.79

RECONCILIATION OF STATE APPORTIONMENT:		CC 322250
ESTIMATED DISTRIBUTION TO DISTRICTS	(0)	7221.00 (0%)
NET INTER-DISTRICT TRANSFERS (IN)/OUT	49,561	8311-04 (0%)(C)
TO COE FOR SPARKS CHARTER	(0)	8311-02 (0%)(C)
SELPA AU (TAKEN FROM PS/RS ENTITLEMENT)	(0)	8311-03 (0%)(C)
TRANSFER IN FROM SE SELPA FOR MOUR2 (BASE)	(68,992)	8791-00 (0%)(C)
OUT-OF-HOME-CARE FUNDING (G-1)	26,926	8311-00 (0%)(C)
OUT-OF-HOME-CARE FUNDING TO COE FROM EX	(13,463)	8311-00 (0%)(C)
ESTIMATED LOW INCIDENCE EQUIP/SUPPLIES F-3	70,090	8311-02 (0%)(C)
PS/RS APPORTIONMENT	576,955	8311-00 (0%)(C)
ESTIMATED TOTAL APPORTIONMENT SELPA II	641,077	8311-00 (0%)(C)

DISTRICT	2018-19 Est ADA	%
FREMONT	10,749.94	31%
SUNNYVALE	6,471.97	19%
MONTEBELLO	-	0%
CUPERTINO	16,982.69	50%
TOTAL	34,204.60	100%
	Pupils in COE programs	1-Dec 17
DISTRICT		%
FREMONT	25.00	45%
SUNNYVALE	9.00	16%
MONTEBELLO	-	0%
CUPERTINO	21.00	38%
TOTAL	55.00	100%

<b>2019-20 ASSUMPTIONS:</b>	
1) COLA - 3.26% OR \$17.5935060619 PER PY ADA	
2) 0% DEFICIT ON AB 602 BASE DUE TO EXCESS ERAF (STATEWIDE 3N)	
3) SELPA AU FUNDING TAKEN OUT OF PS/RS REVENUE	
4) EST INTER-DISTRICT TRANSFER 12/1/18 1 ENROLLMENT	
5) GROWTH AT \$558.35096232131	
6) EST COE COSTS (FEB 2019 ENROLLMENT)	
7) REGIONAL COST SHARE EST AT 2017-18 ACTUALS	
8) PS/RS AT \$16.4836218548055 REESTABLISHED IN 2018-19 USING LANGUAGE IN AB 1808 BUDGET TRAILER BILL (PREVIOUSLY ROLLED INTO AB 602)	
*Spark Charter closed effective 06/30/2018. Per Budget Allocation Plan, any Spark Charter revenue from prior year calculation will be redistributed to districts in SELPA 2 based on P-2 ADA of Spark student's DOE.	

SELPA AU COST SHARE BY ADA (TA)	PS/RS BALANCE TO FREMONT (AT)
FREMONT \$ 255,061.55	\$ 321,893.25
FREMONT \$ 80,161.62	\$ 321,893.25
SUNNYVALE \$ 48,261.07	\$ -
MONTEBELLO \$ -	\$ -
CUPERTINO \$ 126,638.85	\$ -
TOTAL \$ 255,061.55	\$ 321,893.25

# SELPA II - FREMONT UHSD

## 2019-20 PROGRESSION OF SPECIAL ED REVENUE ESTIMATE 5/21/19 May Revised - COLA

DESCRIPTION	RESOURCE	OBJECT	FIRST EST	1ST INTERIM	2ND INTERIM	P-1 CERT	P-2 CERT
<b>AB 602</b>							
STATE AID	6500	8792	(0)				
EXCESS ERAF FOR SP ED	6500	8097	750,538				
COE SPED "EXCESS" PROPERTY TAX TRANSFER	6500	8097	1,993,624				
<b>SUBTOTAL AB 602 (TOTAL 3 SOURCES OF REVENUE)</b>			<b>2,744,162</b>				
<b>OTHER STATE REVENUES</b>							
MISC PY REVENUE DISTRIBUTION	6500	8792	-				
PRIOR YR ADJ TO AB 602 - STATE AID (OTHER THAN AP SETUP, INCLUDES NPS ECF, IF APPLICABLE)	6500	8792	-				
PRIOR YR ADJ TO AB 602 - EXCESS ERAF SWAP WITH PY STATE AID ABOVE	6500	8097	-				
STATE MENTAL HEALTH APPORT	6512	8590	989,665				
RETURN OF UNUSED PY SCCOE CHARTER REVENUE	6500	8792	-				
RETURN OF UNUSED PY SCCOE CHARTER REVENUE	6512	8590	-				
ONE-TIME STATE LOCAL ASSISTANCE	6501	8590	-				
LOW INCIDENCE REIMBURSEMENT REQUEST	6500	8792	-				
PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE**	6500	8792	321,893				
<b>OTHER FEDERAL (IDEA PART B GRANTS)</b>							
FEDERAL LOCAL ASSISTANCE BY PY P2 ADA	3310	8181	1,649,358				
PRESCHOOL LOCAL*	3320	8182	-				
FEDERAL PRESCHOOL	3315	8182	-				
FED MENTAL HEALTH SERV GRANT	3327	8182	404,857				
PRESCHOOL STAFF DEVELOPMENT	3345	8182	-				
<b>GRAND TOTAL SPECIAL EDUCATION REVENUES</b>			<b>6,109,935</b>				

\*Effective 2018-19, Re 3320 will be consolidated into Re 3310

\*\*Program Specialist/Regionalized Services (PS/RS) entitlement reestablished in 2018-19 using language in AB 1808 Budget Trailer Bill (previously rolled into AB 602)

<b>SUMMARY OF ABOVE REVENUE GROUPED BY RESOURCE/OBJECT</b> <b>*****</b>	6500	8792	321,893				
	6500	8097	2,744,162				
	6512	8590	989,665				
	3310	8181	1,649,358				
	3315	8182	-				
	3320	8182	-				
	3327	8182	404,857				
	3345	8182	-				
<b>GRAND TOTAL SPECIAL EDUCATION REVENUES</b>			<b>6,109,935</b>				
REVENUE INCREASE (DECREASE) FROM PREVIOUS PROJECTION:			6,109,935				

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### REVENUE INCREASE (DECREASE) FROM PREVIOUS PROJECTION DUE TO:

CHANGE IN PY ENDING ENTITLEMENT	AB 602						
CHANGE IN COLA							
EQUALIZING BASE RATES							
ESTIMATE OF GROWTH/(DECLINE IN ADA)							
CHANGE IN SUPPLEMENT TO BASE							
ADJUST FOR PRIOR YEAR PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE	Adjustments to AB 602						
DEFICIT ON BASE							
COST OF COE, BY USAGE							
COST OF COE, SP ED IN ASD,							
EST. REGIONAL PROGRAM DEFICIT COST-SHARE IN							
EST. REGIONAL PROGRAM DEFICIT COST-SHARE OUT	Other State Revenues						
EST. UPDATED INTER-DISTRICT TRANSFERS IN							
EST. UPDATED INTER-DISTRICT TRANSFERS OUT							
MISC PY REVENUE DISTRIBUTION							
CHANGE IN STATE MENTAL HEALTH EST.							
RETURN OF UNUSED PY SCCOE CHARTER REVENUE	Other Federal (IDEA Part B Grants)						
CHANGE IN PROGRAM SPECIALIST REVENUE/REG SPECIALIST/NPS PILOT							
PRIOR YR ADJ TO AB 602 (OTHER THAN AP SETUP)							
CHANGE IN LOCAL ASSISTANCE GRANT DISTRIBUTION							
CHANGE IN PRESCHOOL LOCAL							
CHANGE IN FED IDEA MENTAL HEALTH SERV							
CHANGE IN FEDERAL PRESCHOOL							
CHANGE IN FED PRESCHOOL STAFF DEV							
CHANGE IN OTHER STATE REVENUES							

**SELPA II - FREMONT UHSD**  
**2019-20 PROGRESSION OF SPECIAL ED REVENUE ESTIMATES**

DETAILED SUMMARY OF AB 602 CALCULATION		FIRST EST	1ST INTERIM	2ND INTERIM	P-1 CERT	P-2 CERT
AB 602 BASE ENTITLEMENT (FROM PREV. YEAR- WITH ANY PRYR ADJ)		5,648,543				
ADJUST FOR PRIOR YEAR PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE		-				
COLA		189,129				
GROWTH		(123,872)				
EQUALIZING		-				
SUPPLEMENT TO BASE		-				
DEFICIT ON BASE		-				
ENDING ENTITLEMENT AB 602		5,713,800				
ADJUSTMENTS TO ENTITLEMENT						
1) COST OF COE PROGRAMS (TAKEN FROM AB 602 - 2 SOURCES OF REVENUE) **		(1,581,139)				
COST OF COE SP ED IN ALTERNATIVE SCHOOLS		(54,675)				
OUT-OF-HOME-CARE DEF. COST SHARE						
SELPA II REGIONAL COST SHARE IN		(108,660)				
SELPA II REGIONAL COST SHARE OUT		(1,479,906)				
NPS PILOT		361,564				
INTER-DISTRICT TRANSFERS IN		-				
INTER-DISTRICT TRANSFERS OUT		(106,821)				
ENDING AB 602 (TOTAL OF 3 SOURCES OF REVENUE)		2,744,162				
		-				
<b>MISCELLANEOUS INFO.</b>						
2) COST OF COE PROGRAMS TAKEN FROM LOCAL ASSISTANCE- OUTSIDE OF AB 602 **		(34,230)				
TOTAL COST OF COE SPED PROGRAMS [1 and 2 above] **		(1,615,369)				
K-12 ADA (NO ADULT OR ROP), INCL. COE ADA		10,732.06				
ALLOCATED COE ASD ADA		17.88				
PUPILS IN COE PROGRAMS		21.00				
1:1 REG. AIDE HOURS/PER DAY IN COE PROGRAMS		34.77				
1:1 SPHC (HEALTH) AIDE HOURS/PER DAY IN COE PROGRAMS		6.00				

# SELPA II - SUNNYVALE

## 2018-19 PROGRESSION OF SPECIAL ED REVENUE ESTIMATE 5/21/19 May Revised - COLA

DESCRIPTION	RESOURCE	OBJECT	FIRST EST	1ST INTERIM	2ND INTERIM	P-1 CERT	P-2 CERT
<b>AB 602</b>							
STATE AID	6500	8792	(0)				
EXCESS ERAF FOR SP ED	6500	8097	2,561,136				
COE SPED "EXCESS" PROPERTY TAX TRANSFER	6500	8097	1,977,376				
<b>SUBTOTAL AB 602 (TOTAL 3 SOURCES OF REVENUE)</b>			<b>4,538,512</b>				
<b>OTHER STATE REVENUES</b>							
MISC PY REVENUE DISTRIBUTION	6500	8792	-				
PRIOR YR ADJ TO AB 602 - STATE AID (OTHER THAN AP SETUP, INCLUDES NPS COE, IF APPLICABLE)	6500	8792	-				
PRIOR YR ADJ TO AB 602 - EXCESS ERAF SWAP WITH PY STATE AID ABOVE	6500	8097	-				
STATE MENTAL HEALTH APPORT	6512	8590	334,705				
RETURN OF UNUSED PY SCCOE CHARTER REVENUE	6500	8792	-				
RETURN OF UNUSED PY SCCOE CHARTER REVENUE	6512	8590	-				
TRANSFER TO SUNNYVALE FOR BASE YEAR OT (AFTER DEFICIT, IF ANY)	6500	8792	50,050				
PRIOR YR ADJ TO AB602 (PAYMENT OF PY DEFICIT ON OT TO SUNNYVALE)	6500	8097	-				
PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE**	6500	8792	-				
<b>OTHER FEDERAL (IDEA PART B GRANTS)</b>							
FEDERAL LOCAL ASSISTANCE BY PY P2 ADA	3310	8181	1,268,212				
PRESCHOOL LOCAL*	3320	8182	-				
FEDERAL PRESCHOOL	3315	8182	78,410				
FED MENTAL HEALTH SERV GRANT	3327	8182	-				
PRESCHOOL STAFF DEVELOPMENT	3345	8182	561				
<b>GRAND TOTAL SPECIAL EDUCATION REVENUES</b>			<b>6,270,450</b>				

\*Effective 2018-19, Re 3320 will be consolidated into Re 3310

\*\*Program Specialist/Regionalized Services (PS/RS) entitlement reestablished in 2018-19 using language in AB 1808 Budget Trailer Bill (previously rolled into AB 602)

<b>SUMMARY OF ABOVE REVENUE GROUPED BY RESOURCE/OBJECT</b> *****	6500	8792	50,050				
	6500	8097	4,538,512				
	6512	8590	334,705				
	3310	8181	1,268,212				
	3315	8182	78,410				
	3320	8182	-				
	3327	8182	-				
	3345	8182	561				
<b>GRAND TOTAL SPECIAL EDUCATION REVENUES</b>			<b>6,270,450</b>				
REVENUE INCREASE (DECREASE) FROM PREVIOUS PROJECTION:			6,270,450				

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### REVENUE INCREASE (DECREASE) FROM PREVIOUS PROJECTION DUE TO:

CHANGE IN PY ENDING ENTITLEMENT	AB 602						
CHANGE IN COLA							
EQUALIZING BASE RATES							
ESTIMATE OF GROWTH/(DECLINE IN ADA)							
CHANGE IN SUPPLEMENT TO BASE							
ADJUST FOR PRIOR YEAR PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE	Adjustments to AB 602						
DEFICIT ON BASE							
COST OF COE, BY USAGE							
COST OF COE, SP ED IN ASD,							
EST. REGIONAL PROGRAM DEFICIT COST-SHARE IN							
EST. REGIONAL PROGRAM DEFICIT COST-SHARE OUT	Other State Revenues						
EST. UPDATED INTER-DISTRICT TRANSFERS IN							
EST. UPDATED INTER-DISTRICT TRANSFERS OUT							
MISC PY REVENUE DISTRIBUTION							
CHANGE IN STATE MENTAL HEALTH EST.							
TRANSFER TO SUNNYVALE FOR BASE YEAR OT	Other Federal (IDEA Part B Grants)						
RETURN OF UNUSED PY SCCOE CHARTER REVENUE							
CHANGE IN PROGRAM SPECIALIST REVENUE/REG SPECIALIST/NPS PILOT							
PRIOR YR ADJ TO AB 602 (OTHER THAN AP SETUP)							
CHANGE IN LOCAL ASSISTANCE GRANT DISTRIBUTION							
CHANGE IN PRESCHOOL LOCAL							
CHANGE IN FED IDEA MENTAL HEALTH SERV							
CHANGE IN FEDERAL PRESCHOOL							
CHANGE IN FED PRESCHOOL STAFF DEV							
CHANGE IN PY SUNNYVALE FOR BASE YEAR OT							



## SELPA II - SUNNYVALE

### 2018-19 PROGRESSION OF SPECIAL ED REVENUE ESTIMATES

DETAILED SUMMARY OF AB 602 CALCULATION	FIRST EST	1ST INTERIM	2ND INTERIM	P-1 CERT	P-2 CERT
AB 602 BASE ENTITLEMENT (FROM PREV. YEAR- WITH ANY PRYR ADJ)	3,400,689				
ADJUST FOR PRIOR YEAR PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE	-				
COLA	113,865				
GROWTH	(74,577)				
EQUALIZING	-				
SUPPLEMENT TO BASE	-				
DEFICIT ON BASE	-				
ENDING ENTITLEMENT AB 602	3,439,977				
ADJUSTMENTS TO ENTITLEMENT					
1) COST OF COE PROGRAMS (TAKEN FROM AB 602 - 2 SOURCES OF REVENUE) **	(672,413)				
COST OF COE SP ED IN ALTERNATIVE SCHOOLS	(32,917)				
OUT-OF-HOME-CARE DEF. COST SHARE					
SELPA II REGIONAL COST SHARE IN	2,809,440				
SELPA II REGIONAL COST SHARE OUT	(890,973)				
NPS PILOT & PROG SPEC FROM BASE YEAR TO FREMONT	-				
INTER-DISTRICT TRANSFERS IN	-				
INTER-DISTRICT TRANSFERS OUT	(114,601)				
ENDING AB 602 (TOTAL OF 3 SOURCES OF REVENUE)	4,538,512				

<b>MISCELLANEOUS INFO.</b>					
2) COST OF COE PROGRAMS TAKEN FROM LOCAL ASSISTANCE- OUTSIDE OF AB {	**	(16,108)			
TOTAL COST OF COE SPED PROGRAMS	{1 and 2 above} **	(688,521)			
K-12 ADA (NO ADULT OR ROP), INCL. COE ADA		6,471.97			
ALLOCATED COE ASD ADA		-			
PUPILS IN COE PROGRAMS		9.00			
1:1 REG. AIDE HOURS/PER DAY IN COE PROGRAMS		13.05			
1:1 SPHC (HEALTH) AIDE HOURS/PER DAY IN COE PROGRAMS		-			

# SELPA II - CUPERTINO

## 2018-19 PROGRESSION OF SPECIAL ED REVENUE ESTIMATE 5/21/19 May Revised - COLA

DESCRIPTION	RESOURCE	OBJECT	FIRST EST	1ST INTERIM	2ND INTERIM	P-1 CERT	P-2 CERT
<b>AB 602</b>							
STATE AID	6500	8792	0				
EXCESS ERAF FOR SP ED	6500	8097	4,046,442				
COE SPED "EXCESS" PROPERTY TAX TRANSFER	6500	8097	3,076,234				
<b>SUBTOTAL AB 602 (TOTAL 3 SOURCES OF REVENUE)</b>			<b>7,122,676</b>				
<b>OTHER STATE REVENUES</b>							
MISC PY REVENUE DISTRIBUTION	6500	8792	-				
PRIOR YR ADJ TO AB 602 - STATE AID (OTHER THAN AP SETUP, INCLUDES NPS COE, IF APPLICABLE)	6500	8792	-				
PRIOR YR ADJ TO AB 602 - EXCESS ERAF SWAP WITH PY STATE AID ABOVE	6500	8097	-				
STATE MENTAL HEALTH APPORT	6512	8590	878,280				
LOW INCIDENCE REIMBURSEMENT REQUEST	6500	8792	-				
RETURN OF UNUSED PY SCCOE CHARTER REVENUE	6512	8590	-				
ONE-TIME STATE LOCAL ASSISTANCE	6501	8590	-				
PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE**	6500	8792	-				
<b>OTHER FEDERAL (IDEA PART B GRANTS)</b>							
FEDERAL LOCAL ASSISTANCE BY PY P2 ADA	3310	8181	2,877,437				
PRESCHOOL LOCAL*	3320	8182	-				
FEDERAL PRESCHOOL	3315	8182	75,305				
FED MENTAL HEALTH SERV GRANT	3327	8182	-				
PRESCHOOL STAFF DEVELOPMENT	3345	8182	536				
<b>GRAND TOTAL SPECIAL EDUCATION REVENUES</b>			<b>10,954,234</b>				

\*Effective 2018-19, Re 3320 will be consolidated into Re 3310

\*\*Program Specialist/Regionalized Services (PS/RS) entitlement reestablished in 2018-19 using language in AB 1808 Budget Trailer Bill (previously rolled into AB 602)

<b>SUMMARY OF ABOVE REVENUE GROUPED BY RESOURCE/OBJECT</b> *****	6500	8792	0				
	6500	8097	7,122,676				
	6512	8590	878,280				
	3310	8181	2,877,437				
	3315	8182	75,305				
	3320	8182	-				
	3327	8182	-				
	3345	8182	536				
<b>GRAND TOTAL SPECIAL EDUCATION REVENUES</b>			<b>10,954,234</b>				
REVENUE INCREASE (DECREASE) FROM PREVIOUS PROJECTION:			10,954,234				

2016-17 P2

### REVENUE INCREASE (DECREASE) FROM PREVIOUS PROJECTION DUE TO:

CHANGE IN PY ENDING ENTITLEMENT	AB 602						
CHANGE IN COLA							
EQUALIZING BASE RATES							
ESTIMATE OF GROWTH/(DECLINE IN ADA)							
CHANGE IN SUPPLEMENT TO BASE							
ADJUST FOR PRIOR YEAR PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE	Adjustments to AB 602						
DEFICIT ON BASE							
COST OF COE, BY USAGE							
COST OF COE, SP ED IN ASD,							
EST. REGIONAL PROGRAM DEFICIT COST-SHARE IN							
EST. REGIONAL PROGRAM DEFICIT COST-SHARE OUT	Other State Revenues						
EST. UPDATED INTER-DISTRICT TRANSFERS IN							
EST. UPDATED INTER-DISTRICT TRANSFERS OUT							
MISC PY REVENUE DISTRIBUTION							
CHANGE IN STATE MENTAL HEALTH EST.							
RETURN OF UNUSED PY SCCOE CHARTER REVENUE	Other Federal (IDEA Part B Grants)						
CHANGE IN PROGRAM SPECIALIST REVENUE/REG SPECIALIST/NPS PILOT							
PRIOR YR ADJ TO AB 602 (OTHER THAN AP SETUP)							
CHANGE IN LOCAL ASSISTANCE GRANT DISTRIBUTION							
CHANGE IN PRESCHOOL LOCAL							
CHANGE IN FED IDEA MENTAL HEALTH SERV							
CHANGE IN FEDERAL PRESCHOOL							
CHANGE IN FED PRESCHOOL STAFF DEV							
CHANGE IN ONE-TIME STATE LOCAL ASSISTANCE							

## SELPA II - CUPERTINO

### 2018-19 PROGRESSION OF SPECIAL ED REVENUE ESTIMATES

DETAILED SUMMARY OF AB 602 CALCULATION	FIRST EST	1ST INTERIM	2ND INTERIM	P-1 CERT	P-2 CERT
AB 602 BASE ENTITLEMENT (FROM PREV. YEAR- WITH ANY PRYR ADJ)	8,923,533				
ADJUST FOR PRIOR YEAR PROGRAM SPECIALIST/REGIONALIZED SERVICES REVENUE	-				
COLA	298,785				
GROWTH	(195,692)				
EQUALIZING	-				
SUPPLEMENT TO BASE	-				
DEFICIT ON BASE	-				
ENDING ENTITLEMENT AB 602	9,026,627				
ADJUSTMENTS TO ENTITLEMENT					
1) COST OF COE PROGRAMS (TAKEN FROM AB 602 - 2 SOURCES OF REVENUE) **	(1,659,536)				
COST OF COE SP ED IN ALTERNATIVE SCHOOLS	(86,375)				
OUT-OF-HOME-CARE DEF. COST SHARE					
SELPA II REGIONAL COST SHARE IN	2,008,047				
SELPA II REGIONAL COST SHARE OUT	(2,337,947)				
NPS PILOT & PROG SPEC FROM BASE YEAR TO FREMONT	-				
INTER-DISTRICT TRANSFERS IN	174,472				
INTER-DISTRICT TRANSFERS OUT	(2,611)				
ENDING AB 602 (TOTAL OF 3 SOURCES OF REVENUE)	7,122,676				

<b>MISCELLANEOUS INFO.</b>					
2) COST OF COE PROGRAMS TAKEN FROM LOCAL ASSISTANCE- OUTSIDE OF AB {	**	(42,285)			
TOTAL COST OF COE SPED PROGRAMS {1 and 2 above}	**	(1,701,821)			
K-12 ADA (NO ADULT OR ROP), INCL. COE ADA		16,982.69			
ALLOCATED COE ASD ADA		-			
PUPILS IN COE PROGRAMS		20.00			
1:1 REG. AIDE HOURS/PER DAY IN COE PROGRAMS		27.61			
1:1 SPHC (HEALTH) AIDE HOURS/PER DAY IN COE PROGRAMS		6.00			



**APPENDIX C**  
**FEDERAL MAINTENANCE OF EFFORT**

Federal funds for special education should be used to supplement and not supplant state and local funds (E.C. 56841). The specifics of the federal regulations translate this into an MOE calculation, based on expenditures for special education (Sections 300.203-300.205 of Title 34 of the Code of Federal Regulations [CFR]).

The general rule under the MOE requirement is that LEAs must spend at least the same level of state and local funds (or local funds only) on special education as in the prior year, either in terms of total or per-capita expenditures. If an LEA fails this initial test, the federal regulations allow an exempt reduction Under 34 CFR Section 300.204:

- a. Voluntary departure, by retirement or otherwise, or departure for just cause, of special education or related services personnel.
- b. A decrease in the enrollment of children with disabilities.
- c. The termination of the obligation of the agency to provide a program of special education to a particular child with a disability that is an exceptionally costly program, as determined by the SEA, because the child:
  - i. Has left the jurisdiction of the agency;
  - ii. Has reached the age at which the obligation of the agency to provide free appropriate public education (FAPE) to the child has terminated;
  - iii. No longer needs the program of special education.
- d. The termination of costly expenditures for long-term purchases, such as the acquisition of equipment or the construction of school facilities.
- e. The assumption of cost by the high cost fund operated by the SEA under 34 CFR Sec. 300.704(c).

The eligibility standard in Section 300.203(a) requires that, in order to find an LEA eligible for an IDEA Part B subgrant for the upcoming fiscal year, the CDE must determine that the LEA has budgeted for the education of children with disabilities at least the same amount of local, or state and local funds, as it actually spent for the education of children with disabilities during the most recent fiscal year for which information is available.

The compliance standard in Section 300.203(b) prohibits LEA from reducing the level of expenditures for education of children with disabilities made by the LEA from local, or state and local, funds below the level of those expenditures from the same source for the preceding fiscal year.

Beginning 2016, MOE for LEAs must meet the “subsequent-year rule” where if an LEA fails to meet the MOE test in one year, the LEA is required in subsequent fiscal years to maintain effort at the level prior to the failure. Thus, the LEA must calculate its level of effort on the most recent fiscal year in which the MOE test was met.

In order to receive and keep Federal IDEA Funding:

- If the SELPA fails to pass the SEMB (Budget) software test, no Federal IDEA funds will flow to the SELPA in the current year.
- If the SELPA fails to pass the SEMA (Actuals) software test, the amount that the SELPA is short of meeting the requirement, will be returned to the CDE. Those LEAs which failed to meet the MOE requirements in the Actuals to Actuals test will be responsible for the loss. The amount recovered by the CDE will be deducted from the revenue received by those districts.
- If the SELPA passes, but a district fails to meet MOE, federal IDEA funds will be redistributed within the SELPA pursuant to SELPA policy.

# Subsequent Year Tracking Worksheet

LOCAL EDUCATIONAL AGENCY (LEA):

SELPA Code and SELPA Name:

Fiscal Year

2018-19

School Year	A	B	C	D	E	F	G	H	I	J
	State and Local Total Amount	State and Local Total MOE Result	State and Local Per Capita Amount	State and Local Per Capita MOE Result	Local Only Total Amount	Local Only Total MOE Result	Local Only Per Capita Amount	Local Only Per Capita MOE Result	Enrollment	Result for Fiscal Year
2011-2012 Expenditures (Compliance) SEMA - SACS2012ALL		\$ -		\$ -		\$ -		\$ -		
2012-2013 Expenditures (Compliance) SEMA - SACS2013ALL		\$ -		\$ -		\$ -		\$ -		
2013-2014 Expenditures (Compliance) SEMA - SACS2013ALL		\$ -		\$ -		\$ -		\$ -		
2014-2015 Expenditures (Compliance) SEMA - SACS2014ALL		\$ -		\$ -		\$ -		\$ -		
2015-2016 Expenditures (Compliance) SEMA - SACS2015ALL		\$ -		\$ -		\$ -		\$ -		
2016-2017 Expenditures (Compliance) SEMA - SACS2016ALL		\$ -		\$ -		\$ -		\$ -		
2017-2018 Expenditures (Compliance) SEMA - SACS2018ALL		\$ -		\$ -		\$ -		\$ -		
2018-2019 Expenditures (Compliance) SEMA - SACS2019ALL		\$ -		\$ -		\$ -		\$ -		
Expenditures (Eligibility No PCRA) SEMB - SACS2019ALL (Expenditures less PCRA for Comparison Year)	\$ -	Comparison Year		Comparison Year						
Budget (Eligibility) SEMB - SACS2019ALL		\$ -		\$ -		\$ -		\$ -		

The signature of authorized agent conveys agreement with and accuracy of the information provided.

Signature of Authorized Agent

Date Signed

Printed Name and Title of Authorized Agent

Contact Person's Name, E-Mail, and Telephone Number

### **Instructions:**

#### **For Compliance - Report SEMA**

Column A (State and Local Amount) - For fiscal years (FYs) 2011-12 through FY 2014-15, refers to the amount of expenditures reported for Section 3(A3), Column A on the LMC-A worksheet (Report SEMA). For FY 2015-16 and future years, enter the amount of expenditures reported for Section 3(A1c), Column A on the LMC-A worksheet (Report SEMA).

Column C (State and Local Per Capita Amount) - For FYs 2011-12 through FY 2014-15, enter the amount of expenditures reported for Section 3(A5), Column A on the LMC-A worksheet (Report SEMA). For FY 2016-17 and future years, enter the amount of expenditures for Section 3(A2e), Column A on the LMC-A worksheet (Report SEMA).

Column E (Local Only Amount) - Enter the amount of expenditures reported for Section 3(B1a), Column A on the LMC-A worksheet (Report SEMA).

Column G (Local Only Per Capita Amount) - For FY 2016-17 and future years, enter the amount of expenditures reported for Section 3(B2c), Column A on the LMC-A worksheet (Report SEMA).

Column I - (Enrollment) - For FYs 2011-12 through 2014-15, enter the number of students reported for Section 3(A4), Column A on the LMC-A worksheet (Report SEMA). For FY 2016-17 and future years, enter the number of students reported for Section 3(A2d), Column A on the LMC-A worksheet (Report SEMA).

Columns B, D, F, and H - (MOE Result) - For each method and year, use the drop down box and select an MOE compliance result: "Met," "Met with Exceptions or Adjustments," or "Did Not Meet." If you select "Met with Exceptions or Adjustments," enter the amount of the exceptions or adjustments. If you select "Met," or "Did Not Meet," then do not enter an amount.

#### **For Eligibility - Report SEMB**

Column A (State and Local Amount) - For FY 2016-17 and future years, enter the amount of expenditures reported for Section 3(A1c), Column A on the LMC-B worksheet (Report SEMB).

Column B (State and Local Total MOE Result) - As the LMC-B report does not include the Program Cost Report Allocations (PCRA) amount that was included in the comparison year LMC-A reports, the PCRA comparison year line item has been added to the worksheet. Enter the PCRA amount that the LEA used the last time it met state and local total, and this PCRA amount is considered a deduction for the budget state and local total amount.

Column C (State and Local Per Capita Amount) - For FY 2016-17 and future years, enter the amount of expenditures for Section 3(A2e), Column A on the LMC-B worksheet (Report SEMB).

Column D (State and Local Per Capital MOE Result) - As the LMC-B report does not include the PCRA amount that was included in the comparison year LMC-A reports, the PCRA comparison year line item has been added to the worksheet. Enter the PCRA amount divided by the comparison year's Enrollment that the LEA used the last time it met state and local total per capita, and this PCRA amount per capita is considered a deduction for the budget state and local total amount per capita.

Column E (Local Only Amount) - Enter the amount of expenditures reported for Section 3(B1a), Column A on the LMC-B worksheet (Report SEMB).

Column G (Local Only Per Capita Amount) - For FY 2016-17 and future years, enter the amount of expenditures reported for Section 3(B2c), Column A on the LMC-B worksheet (Report SEMB).

Column I - (Enrollment) - For FY 2016-17 and future years, enter the number of students reported for Section 3(A2d), Column A on the LMC-B worksheet (Report SEMB).

Columns B, D, F, and H - (MOE Result) - For each method and year, use the drop down box and select an MOE compliance result: "Met," "Met with Exceptions or Adjustments," or "Did Not Meet." If you select "Met with Exceptions or Adjustments," enter the amount of the exceptions or adjustments. If you select "Met," or "Did Not Meet," then do not enter an amount.



<b>EXEMPT REDUCTIONS TO MAINTENANCE OF EFFORT</b> IDEA Regulations 34 Code of Federal Regulations § 300.204		
Local Education Agency (LEA) Name		Special Education Local Plan Area (SELPA)
Name of Person Completing Report		Telephone & Fax Numbers
Maintenance of Effort (MOE) Shortfall from LEA MOE Calculation (LMC-A or LMC-B) Worksheet		<b>\$0.00</b>  <b>FY xxxx/xxxx</b>
<i>The LEA may reduce the level of expenditures below the level of the preceding fiscal year if the reduction is attributable to any of the following reasons. Provide specific details and dollar amounts. If the total justifications equal/exceed the MOE shortfall, fiscal effort has been maintained for the reporting year.</i>		
<b>1. The voluntary departure, by retirement or otherwise, or departure for just cause, of certificated and/or classified special education or related services personnel (does not include contract non-renewal or staff lay-off due to budget shortfall).</b>		<b>\$0.00</b>
ENTER INFORMATION on the <i>detail reduction 1</i> tab; totals will carry forward to this section		
<b>2. A decrease in enrollment of children with disabilities.</b>		<b>\$0.00</b>
ENTER INFORMATION on the <i>detail reduction 2</i> tab; totals will carry forward to this section		
<b>3. The termination of the obligation to provide a program of special education to a particular child with a disability that is an exceptionally costly program because:</b>		<b>\$0.00</b>
<b>A. Child has left the jurisdiction of the agency; OR</b> <b>B. Child has reached the age at which the obligation of the agency to provide free appropriate public education (FAPE) to the child has</b> <b>C. No longer needs the program of special education</b>		
ENTER INFORMATION on the <i>detail reduction 3</i> tab; totals will carry forward to this section		
<b>4. The termination of costly expenditures for long-term purchases, such as the acquisition of equipment or the construction of school facilities (must have per unit cost of \$5,000 or more).</b>		<b>\$0.00</b>
ENTER INFORMATION on the <i>detail reduction 4</i> tab; totals will carry forward to this section		
<b>TOTAL ALLOWABLE EXEMPTIONS TO MOE</b>		<b>\$0.00</b>
(must equal amount of total exemption reductions entered in Section 1 of the LMC-A or LMC-B)		
CDE Use Only		
California Department of Education, Special Education Division, April 23, 2015		

Local Education Agency (LEA) Name		Special Education Local Plan Area (SELPA)				
0		0				
<b>EXEMPT REDUCTIONS TO MAINTENANCE OF EFFORT</b>						
1. The voluntary departure, by retirement or otherwise, or departure for just cause, of certificated and/or classified special education or related services personnel (does not include contract non-renewal or staff lay-off due to budget shortfall).						
<b>DEPARTING</b>						
No.	Position Title	Employee Name	Reason for Leaving	Salary	Benefits	Total
1.						\$0.00
2.						\$0.00
3.						\$0.00
4.						\$0.00
5.						\$0.00
6.						\$0.00
7.						\$0.00
8.						\$0.00
9.						\$0.00
10.						\$0.00
11.						\$0.00
12.						\$0.00
13.						\$0.00
14.						\$0.00
15.						\$0.00
16.						\$0.00
17.						\$0.00
18.						\$0.00
19.						\$0.00
20.						\$0.00
21.						\$0.00
22.						\$0.00
23.						\$0.00
24.						\$0.00
25.						\$0.00
26.						\$0.00
27.						\$0.00
28.						\$0.00
29.						\$0.00
30.						\$0.00
<b>Departing Total</b>				\$0.00	\$0.00	\$0.00
<b>REPLACED BY</b>						
No.	Position Title	Employee Name		Salary	Benefits	Total
1.						\$0.00
2.						\$0.00
3.						\$0.00
4.						\$0.00
5.						\$0.00
6.						\$0.00
7.						\$0.00
8.						\$0.00
9.						\$0.00
10.						\$0.00
11.						\$0.00
12.						\$0.00
13.						\$0.00
14.						\$0.00
15.						\$0.00
16.						\$0.00
17.						\$0.00
18.						\$0.00
19.						\$0.00
20.						\$0.00
21.						\$0.00
22.						\$0.00
23.						\$0.00
24.						\$0.00
25.						\$0.00
26.						\$0.00
27.						\$0.00
28.						\$0.00
29.						\$0.00
30.						\$0.00
<b>Replacement Total</b>				\$0.00	\$0.00	\$0.00
<b>1. Departure Net Difference</b>				\$0.00	\$0.00	\$0.00

Local Education Agency (LEA) Name <b>0</b>	Special Education Local Plan Area (SELPA) <b>0</b>
<b>EXEMPT REDUCTIONS TO MAINTENANCE OF EFFORT</b>	
<b>2. A decrease in enrollment of children with disabilities.</b>	
A. Current Year Special Ed. Unduplicated Pupil Count (SEMA or SEMB, Section 3, Line A4, Column A)	
B. Prior Year Special Ed. Unduplicated Pupil Count (SEMA or SEMB, Section 3, Line A4, Column B)	
C. Difference (only applicable if negative)	<b>not applicable</b>
D. Fractional decline (Line 2C (expressed as positive) divided by Line 2B)	0.00000%
E. Prior Year Expenditures from State and Local Sources (SEMA or SEMB, Section 3, Line A3, Column B)	
F. Allowable decline in expenditures related to decline in pupil count (Line D x Line E)	\$0.00
<b>2. Decrease in Enrollment</b>	<b>\$0.00</b>
California Department of Education, Special Education Division, April 23, 2015	

Local Education Agency (LEA) Name <b>0</b>	Special Education Local Plan Area (SELPA) <b>0</b>	
<b>EXEMPT REDUCTIONS TO MAINTENANCE OF EFFORT</b>		
<p><b>3. The termination of the obligation to provide a program of special education to a particular child with a disability that is an exceptionally costly program because:</b></p> <p><b>A. <i>Child has left the jurisdiction of the agency; OR</i></b></p> <p><b>B. <i>Child has reached the age at which the obligation of the agency to provide free appropriate public education (FAPE) to the child has terminated; OR</i></b></p> <p><b>C. <i>No longer needs the program of special education</i></b></p>		
<b>Student Name</b>	<b>Reason (indicate A, B, or C)</b>	<b>Total</b>
1.		\$0.00
2.		\$0.00
3.		\$0.00
4.		\$0.00
5.		\$0.00
6.		\$0.00
7.		\$0.00
8.		\$0.00
9.		\$0.00
10.		\$0.00
11.		\$0.00
12.		\$0.00
13.		\$0.00
14.		\$0.00
15.		\$0.00
16.		\$0.00
17.		\$0.00
18.		\$0.00
19.		\$0.00
20.		\$0.00
21.		\$0.00
22.		\$0.00
23.		\$0.00
24.		\$0.00
25.		\$0.00
26.		\$0.00
27.		\$0.00
28.		\$0.00
29.		\$0.00
30.		\$0.00
<b>3. Total of Termination of Obligation</b>		<b>\$0.00</b>
California Department of Education, Special Education Division, April 23, 2015		

Local Education Agency (LEA) Name <b>0</b>	Special Education Local Plan Area (SELPA) <b>0</b>
<b>EXEMPT REDUCTIONS TO MAINTENANCE OF EFFORT</b>	
<p><b>4. The termination of costly expenditures for long-term purchases, such as the acquisition of equipment or the construction of school facilities (must have per unit cost of \$5,000 or more).</b></p>	
<b>Description of Expenditure</b>	<b>Total</b>
1.	\$0.00
2.	\$0.00
3.	\$0.00
4.	\$0.00
5.	\$0.00
6.	\$0.00
7.	\$0.00
8.	\$0.00
9.	\$0.00
10.	\$0.00
11.	\$0.00
12.	\$0.00
13.	\$0.00
14.	\$0.00
15.	\$0.00
16.	\$0.00
17.	\$0.00
18.	\$0.00
19.	\$0.00
20.	\$0.00
21.	\$0.00
22.	\$0.00
23.	\$0.00
24.	\$0.00
25.	\$0.00
26.	\$0.00
27.	\$0.00
28.	\$0.00
29.	\$0.00
30.	\$0.00
<b>4. Total Termination of Costly Expenditures</b>	
<b>\$0.00</b>	
California Department of Education, Special Education Division, April 23, 2015	



## **APPENDIX D**

### **STATE REQUIRED REPORTING**

#### **Annual Budget Plans (E.C. Section 56205)**

Each local plan submitted to the superintendent under this part shall also contain all the following:

An annual budget plan that shall be adopted at a public hearing held by the special education local plan area. Notice of this hearing shall be posted in each school in the local plan area at least 15 days prior to the hearing. The annual budget plan may be revised during any fiscal year according to the policymaking process established pursuant to subparagraph (D) and (E) of paragraph (12) of subdivision (a) and consistent with subdivision (f) of Section 56001 and Section 56195.9. The annual budget plan shall identify expected expenditures for all items required by this part which shall include, but not be limited to, the following:

- a) Funds received in accordance with Chapter 7.2 (commencing with Section 56836).
- b) Administrative costs of the plan.
- c) Special education services to pupils with severe disabilities and low incidence disabilities.
- d) Special education services to pupils with non-severe disabilities.
- e) Supplemental aids and services to meet the individual needs of pupils placed in regular education classrooms and environments.
- f) Regionalized operations and services, and direct instructional support by program specialists in accordance with Article 6 (commencing with Section 56836.23) of Chapter 7.2.
- g) The use of property taxes allocated to the special education local plan area pursuant to Section 2572.

**Certification of Annual Budget Plan  
Fiscal Year 2019-20**

**1. Check one, as applicable:**

☐ Single District

☒ Multiple District

☐ District/County

Special Education Local Plan Area (SELPA) Code <b>4302 QQ</b>	SELPA Name <b>Santa Clara Area 2</b>	Application Date <b>May 30, 2019</b>
SELPA Address <b>1290 Ridder Park Drive, MC277</b>	SELPA City <b>San Jose</b>	SELPA Zip code <b>95131</b>
Name SELPA Director (Print) <b>Leo Mapagu</b>	SELPA Director's Telephone Number <b>(408) 453-6566</b>	

**2. Certification by Designated Administrative And Fiscal Agency for This Program  
(Responsible Local Agency/Administrative Unit (RLA/AU))**

RLA/AU Name <b>Santa Clara County Office of Education</b>	Name/Title of RLA/AU Superintendent <b>Mary Ann Dewan, Ph.D./ County Supt.</b>	RLA/AU Telephone Number <b>(408) 453-6511</b>
RLA/AU Street Address <b>1290 Ridder Park Drive, MC277</b>	RLA/AU City <b>San Jose</b>	RLA/AU Zip code <b>95131</b>
Date of Governing Board Approval <b>June 14, 2019</b>		

**Certification of Approval of Annual Budget Plan Pursuant to California Education Code  
Section 56205(b)**

I certify that the Annual Budget Plan was developed according to the SELPA's local plan governance and policy making process. Notice of this public hearing was posted in each school within the SELPA at least 15 days prior to the hearing.

The **Annual Budget Plan** was presented for public hearing on June 14, 2019.

Adopted this 14<sup>th</sup> day of June, 2019.

Signed: \_\_\_\_\_

  
RLA/AU Superintendent



### Annual Budget Plan Fiscal Year 2019–20

The Annual Budget Plan shall identify expected expenditures for all items required by this part as listed below. The Standardized Account Code Structure (SACS) codes provide source information from the local educational agency (LEA) reporting.

	Reference/Label	Instructions	Estimated Totals
A	Funds received in accordance with Chapter 7.2 (commencing with California <i>Education Code</i> [EC] Section 56836) (Special Education Program Funding)	SACS Resource Code 6500 (State), 3300–3499 (Federal) 6512–6535 (General Fund)	\$ 19,267,698 \$ 6,484,400 \$ 2,346,307
B	Administrative costs of the plan	SACS Goal Code 5001 Function 2100	\$ 5,063,524
C	Special Education services to pupils with: (1) <b>severe disabilities</b> , and (2) <b>low-incidence disabilities</b>	SACS Goal Code 5710	\$ 181,677
		SACS Goal Code 5730	\$ 3,438,469
		SACS Goal Code 5750	\$ 49,517,377
D	Special education services to pupils with <b>non-severe disabilities</b>	SACS Goal Code 5770	\$ 32,209,475
E	Supplemental aids and services to meet the individual needs of pupils placed in <b>regular education classrooms</b> and environments	Any SACS Goal Code with SACS Function Code 1130 <sup>1</sup>	\$ 7,780,866
F	Regionalized operations and services, and direct instructional support <b>by program specialists</b> in accordance with Article 6 (commencing with Section 56836.23) of Chapter 7.2 (SELPA Program Specialists Funding)	SACS Goal Code 5050	\$ 3,229,687
		SACS Goal Code 5060	\$ 0
G	The use of <b>property taxes</b> allocated to the special education local plan area pursuant to EC Section 2572	Statement is included in Local Plan	

<sup>1</sup> Function Activity Classification can be found <http://www.cde.ca.gov/be/ag/ag/yr08/mar08item24a6.doc>

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For California Department of Education Use Only

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Received by the State Superintendent of Public Instruction: Date: \_\_\_\_\_ By: \_\_\_\_\_



## **APPENDIX E**

### **SPECIAL EDUCATION INTER-DISTRICT TRANSFERS**

1. Inter-district Transfers Instructions
2. Inter-district Transfers Forms
3. List of NW SELPA Districts
4. List of Regional and Actual Cost Programs
5. District Direct and Indirect Cost Rates (for calculating charges)
6. District Base LCFF funding (for calculating Inter-districts)
7. Special Education Inter-District Transfer Procedure (lifted from SELPA Procedural Handbook)



### CALCULATION FOR 2019-20 SPECIAL EDUCATION INTER-DISTRICT TRANSFERS

a) Select the appropriate charges for the student (example: if the student is in SDC 8 class, use the corresponding cost in the Average cost Per Student column). (Take note of the important information for Preschool students and Basic Aid DOS, also see page 2 of this document).

PROGRAM TYPE		PROGRAM TYPE	
CITY		CITY	
1 AVERAGE COST PROGRAM		2 REGIONAL/ACTUAL COST PROGRAM	
AVERAGE COST PER CLASSROOM PER YEAR:		REGIONAL PROGRAM ACTUAL COST PER CLASSROOM PER YEAR:	
A. TEACHER FTE	1 129.137	TEACHER SALARIES & BENEFITS	
B. AIDE - PRECISE	2 20.337	AIDE SALARIES & BENEFITS	26
C. AIDE - PRECISE	3 12.100	ADULT SUPPLIES	
D. AIDE - PRECISE	4 3.338	ADULT SUPPLIES	
E. AIDE - PRECISE	5 24.556	ADULT SUPPLIES	
F. AIDE - PRECISE	6 185.193	ADULT SUPPLIES	
G. AIDE - PRECISE	7 185.193	ADULT SUPPLIES	
H. AIDE - PRECISE	8 185.193	ADULT SUPPLIES	
I. AIDE - PRECISE	9 185.193	ADULT SUPPLIES	
J. AIDE - PRECISE	10 185.193	ADULT SUPPLIES	
K. AIDE - PRECISE	11 185.193	ADULT SUPPLIES	
L. AIDE - PRECISE	12 185.193	ADULT SUPPLIES	
M. AIDE - PRECISE	13 185.193	ADULT SUPPLIES	
N. AIDE - PRECISE	14 185.193	ADULT SUPPLIES	
O. AIDE - PRECISE	15 185.193	ADULT SUPPLIES	
P. AIDE - PRECISE	16 185.193	ADULT SUPPLIES	
Q. AIDE - PRECISE	17 185.193	ADULT SUPPLIES	
R. AIDE - PRECISE	18 185.193	ADULT SUPPLIES	
S. AIDE - PRECISE	19 185.193	ADULT SUPPLIES	
T. AIDE - PRECISE	20 185.193	ADULT SUPPLIES	
U. AIDE - PRECISE	21 185.193	ADULT SUPPLIES	
V. AIDE - PRECISE	22 185.193	ADULT SUPPLIES	
W. AIDE - PRECISE	23 185.193	ADULT SUPPLIES	
X. AIDE - PRECISE	24 185.193	ADULT SUPPLIES	
Y. AIDE - PRECISE	25 185.193	ADULT SUPPLIES	
Z. AIDE - PRECISE	26 185.193	ADULT SUPPLIES	
AA. AIDE - PRECISE	27 185.193	ADULT SUPPLIES	
AB. AIDE - PRECISE	28 185.193	ADULT SUPPLIES	
AC. AIDE - PRECISE	29 185.193	ADULT SUPPLIES	
AD. AIDE - PRECISE	30 185.193	ADULT SUPPLIES	
AE. AIDE - PRECISE	31 185.193	ADULT SUPPLIES	
AF. AIDE - PRECISE	32 185.193	ADULT SUPPLIES	
AG. AIDE - PRECISE	33 185.193	ADULT SUPPLIES	
AH. AIDE - PRECISE	34 185.193	ADULT SUPPLIES	
AI. AIDE - PRECISE	35 185.193	ADULT SUPPLIES	
AJ. AIDE - PRECISE	36 185.193	ADULT SUPPLIES	
AK. AIDE - PRECISE	37 185.193	ADULT SUPPLIES	
AL. AIDE - PRECISE	38 185.193	ADULT SUPPLIES	
AM. AIDE - PRECISE	39 185.193	ADULT SUPPLIES	
AN. AIDE - PRECISE	40 185.193	ADULT SUPPLIES	
AO. AIDE - PRECISE	41 185.193	ADULT SUPPLIES	
AP. AIDE - PRECISE	42 185.193	ADULT SUPPLIES	
AQ. AIDE - PRECISE	43 185.193	ADULT SUPPLIES	
AR. AIDE - PRECISE	44 185.193	ADULT SUPPLIES	
AS. AIDE - PRECISE	45 185.193	ADULT SUPPLIES	
AT. AIDE - PRECISE	46 185.193	ADULT SUPPLIES	
AU. AIDE - PRECISE	47 185.193	ADULT SUPPLIES	
AV. AIDE - PRECISE	48 185.193	ADULT SUPPLIES	
AW. AIDE - PRECISE	49 185.193	ADULT SUPPLIES	
AX. AIDE - PRECISE	50 185.193	ADULT SUPPLIES	
AY. AIDE - PRECISE	51 185.193	ADULT SUPPLIES	
AZ. AIDE - PRECISE	52 185.193	ADULT SUPPLIES	
BA. AIDE - PRECISE	53 185.193	ADULT SUPPLIES	
BB. AIDE - PRECISE	54 185.193	ADULT SUPPLIES	
BC. AIDE - PRECISE	55 185.193	ADULT SUPPLIES	
BD. AIDE - PRECISE	56 185.193	ADULT SUPPLIES	
BE. AIDE - PRECISE	57 185.193	ADULT SUPPLIES	
BF. AIDE - PRECISE	58 185.193	ADULT SUPPLIES	
BG. AIDE - PRECISE	59 185.193	ADULT SUPPLIES	
BH. AIDE - PRECISE	60 185.193	ADULT SUPPLIES	
BI. AIDE - PRECISE	61 185.193	ADULT SUPPLIES	
BJ. AIDE - PRECISE	62 185.193	ADULT SUPPLIES	
BK. AIDE - PRECISE	63 185.193	ADULT SUPPLIES	
BL. AIDE - PRECISE	64 185.193	ADULT SUPPLIES	
BM. AIDE - PRECISE	65 185.193	ADULT SUPPLIES	
BN. AIDE - PRECISE	66 185.193	ADULT SUPPLIES	
BO. AIDE - PRECISE	67 185.193	ADULT SUPPLIES	
BP. AIDE - PRECISE	68 185.193	ADULT SUPPLIES	
BQ. AIDE - PRECISE	69 185.193	ADULT SUPPLIES	
BR. AIDE - PRECISE	70 185.193	ADULT SUPPLIES	
BS. AIDE - PRECISE	71 185.193	ADULT SUPPLIES	
BT. AIDE - PRECISE	72 185.193	ADULT SUPPLIES	
BU. AIDE - PRECISE	73 185.193	ADULT SUPPLIES	
BV. AIDE - PRECISE	74 185.193		

	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	511	512	513	514	515	516	517	518	519	520	521	522	523	524	525	526	527	
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[illegible]

- b) Provide District of Residence, District of Service, Student ID # (no student names please) and Birth Date. If DOS is a Basic Aid district, indicate "Y" for Yes, otherwise put "N" for No.
- c) Provide the actual salary and benefits of the teacher, actual salary and benefits for teacher's aide time in the classroom, and estimated classroom supplies for that Regional/Actual Program. All figures should reflect best estimates of actual costs for the full, current year. You may need to seek assistance from your district's fiscal/payroll/HR to obtain this information.
- d) Fill in your district's Adjusted PCR Direct Support Rate % (refer to Appendix C: "Direct Support and Indirect Cost Rates- NW SELPA District" spreadsheet provided, **Column {I}**). Multiply the Adjusted PCR Direct Support Rate by the Subtotal (A) to get Direct Support (A1).
- e) Add Subtotal (A) and the Direct Support (A1) to get Subtotal (B).
- f) Fill in your district's PCR Indirect Cost Rate % (refer to the Appendix C: "Direct Support and Indirect Cost Rates- NW SELPA District" spreadsheet provided, **Column {F}**). Multiply the PCR Indirect Cost Rate by the Subtotal (B) to get Indirect Cost (B1).
- g) Add Subtotal (B), Indirect Cost (B1), and the Facilities Cost (standard amount for all districts) to get the Regional/Actual Program Cost (Subtotal C).
- h) Fill in the actual number of students enrolled in the class on December 1, 2019.
- i) Divide the Subtotal (C) by the number of students in the class to get a per student rate, (D).
- j) To get the actual per student amount for that class, subtract your district's Average-Adjusted LCFF plus Adjusted AB602 base rate/ student (refer to Appendix C: "Average LCFF Base for Inter-District Transfers-NW SELPA Districts" spreadsheet provided, **Column H**). For Preschool students and Basic Aid DOS, refer to important note below:

**\*\*IMPORTANT PRESCHOOL AND BASIC AID INFORMATION\*\***

- *Preschoolers do not generate ADA or Revenue Limit funding, so do not deduct the Ave-Adjusted LCFF or AB 602 for preschool programs.*
  - *Basic Aid districts should only deduct the adjusted AB 602 funding since they do not receive LCFF funding. (Refer to Appendix C: "Average LCFF Base for Inter-District Transfers-NW SELPA Districts" spreadsheet provided, use data in **Column G**, not **Column H**).*
- 
- k) Similarly, additional actual costs per Student may be calculated and added at the bottom of the form. Please be sure to indicate the nature of all additional services.
  - l) Copy the actual cost per student and all additional costs into the "Summary of Charges to District of Residence" table at the bottom of the page. For each of the census dates (December 1 & April 1), report dollar amounts as full year costs.
  - m) On April 1 2020, copy the December form and complete the column for April. Again, the costs reported should be for a full year.
  - n) When the April enrollment is calculated, the December total and April total will be added together and divided by two to get the average for the year. If a student is enrolled on one census date, but not on the other, please indicate so by placing a zero (\$0) in the total line for the census date for which the student was not enrolled.

## II. INTER-DISTRICT TRANSFERS REPORTING FORM

- This is the form to use to obtain a signature from the DOR.
- A copy of the completed form must be sent to the SELPA AU in order to receive apportionment adjustment for transfers. Please provide Student ID# only (no student names).

DISTRICT OF SERVICE _____ NAME/SIGNATURE _____ DATE _____	FOR DECEMBER 1 ENROLLMENT _____ NAME/SIGNATURE _____ DATE _____	FOR APRIL 1 ENROLLMENT _____ NAME/SIGNATURE _____ DATE _____
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### 2019-20 INTER-DISTRICT TRANSFERS REPORTING FORM

IMPORTANT NOTE: FOR EACH OF THE CENSUS DATES (DEC 1 AND APRIL 1), REPORT ALL DOLLAR AMOUNTS AS "FULL YEAR" COST. COSTS FOR DECEMBER 1 AND APRIL 1 WILL BE AVERAGED FOR FINAL COSTS.  
 SUBMIT A COMPLETED FORM TO SELPA AU

STUDENT ID#	COST PER STUDENT PER YEAR	ADDITIONAL CLASSROOM AIDE	SPEECH/LANGUAGE	AIDE	OT	OTHER SERVICES, PLEASE SPECIFY	OTHER SERVICES, PLEASE SPECIFY	TOTAL	IS THIS A REGIONAL/ ACTUAL COST PROGRAM? (Y OR N)
1	EXTENDED YR DEC 1								
	APR 1								
2	EXTENDED YR DEC 1								
	APR 1								
3	EXTENDED YR DEC 1								
	APR 1								
4	EXTENDED YR DEC 1								
	APR 1								
5	EXTENDED YR DEC 1								
	APR 1								
6	EXTENDED YR DEC 1								
	APR 1								
7	EXTENDED YR DEC 1								
	APR 1								

District of Service, please complete one form for each district sending students. 1) For to District of Residence (for review & signature, and 2) For copy to SELPA AU. District of Residence, please confirm charges, sign, and 3) For to District of Service. 2) For to SELPA AU, attention: Karen Santiago (408) 453-4337. District of Service's reported charges will be adjusted in the apportionment distribution process, unless clearly contested by the District of Residence.

### Instructions for completing this form:

- DOS to complete one page for each DOR that you want to collect Special Education inter-district transfer revenue.
- Complete the information on the Extended Year and December 1/April 1 enrollment lines for each transfer student that your district is serving from a single DOR. **Remember:** For each of the census dates, report dollar amounts as full year costs.
- If a student is being served in the identified "Regional/ Actual Cost Program (Appendix B)", complete this form with the data calculated on the "Calculation for 2019-20 Special Education Inter-district Transfers Form" (discussed earlier in *Section I of this document*) Regional/ Actual Cost Program column, and indicate "Y" for "Yes" in the last column.
- If the student is not being served in the identified "Regional/ Actual Cost Program", complete this form with the data calculated on the "Calculation for 2019-20 Special Education Inter-district Transfers Form" Average Cost Program column, and indicate "N" for "No" in the last column, which asks whether this is an Actual Cost program.
- Students in Regional and Actual Cost and Average Cost programs may be mixed on this form. However, any district which has lines reflecting actual cost must send a copy of the "Calculation for 2019-20 Special Education Inter-district Transfers" form to the DOR to show detail of actual cost calculation.

## III. EXTENDED SCHOOL YEAR

- This is a form for reporting charges for Inter-district transfers in Extended Year programs (Summer of 2019).

- DOS completes one page for each Inter-district transfer student attending Extended Year programs.

**Instructions for completing this form:**

1. Provide District of Residence, District of Service, Student ID # *(no student names please)* and Birth Date.
2. Provide Teacher's daily salary, and multiply by 1.12 to get Salary plus Benefits per day {B}.
3. Provide Instructional Aide's hourly rate, work hours per day, and percentage of salary and benefits (e.g., if benefits are estimated at 20% of salary, enter 1.20). Multiply hourly rate by hours per day times percentage of salary and benefits to get Salary plus Benefits per day {F}.
4. Add {B} plus {F} to get Total Salary and Benefits per Day {F}. Indicate the number of days in Extended Year {H}. Multiply {F} by {H} to get the Total Salary and Benefits {}.
5. Multiply {} by the Average Direct Support Rate from PCR to get Subtotal A.
6. Multiply Subtotal A by the Average Indirect Cost Rate from PCR to get Subtotal B.
7. Select the appropriate class loading standard by typing X on the appropriate cell and divide by that number of students per class.
8. Add in the cost of other services.
9. Arrive at cost for that student to attend Extended Year programs. Transfer that amount to the Extended Year line on the "2019-20 Inter-district Transfers Reporting Form".

DISTRICT OF RESIDENCE	STUDENT (LOW)	BIRTHDATE	DISTRICT OF SERVICE
<b>CALCULATION FOR SPECIAL EDUCATION INTER-DISTRICT TRANSFERS 2019-20 (SUMMER OF 2019)</b>			
<b>EXTENDED YEAR</b>			
<b>TEACHER - SALARY &amp; BENEFITS</b>			
(A) DAILY SALARY	TIMES	1 DAY	TIMES
(B) SALARY PLUS BENEFITS PER DAY	1.17 [SALARY PLUS BENEFIT RATE]	=	=
<b>INSTRUCTIONAL AIDE - SALARY &amp; BENEFITS</b>			
(C) HOURLY RATE	TIMES	(D) (HRS/DAY)	TIMES
(E) SALARY PLUS APPROX. BENEFIT RATE	=	=	=
<b>TOTAL SALARY &amp; BENEFITS</b>			
(F) TOTAL SALARY & BENEFITS PER DAY	(G) = (B) * (D)	P# NUMBER OF DAYS	=
AVERAGE DIRECT SUPPORT FROM PCR	SUBTOTAL (A)	1.1396	=
AVERAGE INDIRECT SUPPORT FROM PCR	SUBTOTAL (B)	1.0646	=
<b>TOTAL COST FOR EXTENDED YEAR PROGRAM PER STUDENT</b>			
INDICATE WITH "+" IN THIS COLUMN:			
CHOOSE NUMBER OF STUDENTS PER CLASS, BY TYPING X	8/C CLASS	8	
	10/C CLASS	10	
	12/C CLASS	12	
	28/PER TEACHER	28	
<b>OTHER COSTS (SPECIFY PER DISTRICT AGREEMENT)</b>			
COUNSELING, NURSING SERVICES, I.T. AIDS, TRANSLATOR			
VISION THERAPIST, O & M, (OTHER)			
<b>TOTAL COST FOR EXTENDED YEAR PROGRAM PER STUDENT</b>			

## SUMMARY

**In all cases, in order to receive adjustments to Special Ed apportionments for Inter-district Transfers:**

- District of Service** completes one "2019-20 Inter-district Transfers Reporting Form" for each district sending students. Sign, date and send a copy of the completed form to the District of Residence and to the SELPA AU (Karen\_Santiago@sccoe.org or fax at 408-453-4337).
- Upon receipt of the form, **District of Residence**, signs, dates, and faxes a copy back to the District of Service and to the SELPA AU, noting any corrections or disputes.
- Apportionments will be adjusted by the SELPA AU, according to the forms completed by the District of Service, unless charges are contested in writing by noting corrections or disputes on the signature copy of the reporting form within 60 days of the enrollment census dates (December 1 and April 1).

# **CALCULATION FOR 2019-20 SPECIAL EDUCATION INTER-DISTRICT TRANSFERS** (INTER-SELPA FISCAL TRANSFERS)

**IMPORTANT NOTES:**

- REFER TO THE INSTRUCTIONS PAGE FOR ASSISTANCE IN COMPLETING THIS FORM.
- THE FORMS MUST BE COMPLETED BY THE DISTRICT OF SERVICE (DOS) FOR EACH INTER-DISTRICT TRANSFER STUDENT IN ORDER TO GENERATE SPECIAL ED REVENUE FUND TRANSFER FOR THAT STUDENT.
- FOR EACH STUDENT, CALCULATE COST FOR EITHER AVERAGE COST PROGRAM OR REGIONAL/ACTUAL COST PROGRAM (NOT BOTH).
- A COPY OF THIS FORM MUST ACCOMPANY THE INTER-DISTRICT TRANSFER REPORTING FORM SENT TO THE DISTRICT OF RESIDENCE.

PROGRAM TYPE  
EITHER

AVERAGE COST PROGRAM				
AVERAGE COST PER CLASSROOM PER YEAR:				
A) TEACHER - FTE	1	x	\$ 129,337	\$ 129,337
B) AIDE - HRS/DAY	6	x	\$ 10,397	\$ 62,380
AVERAGE SUPPLIES x CPI	3.33%	x	\$ 848	\$ 876
<b>SUBTOTAL</b>				<b>\$ 192,593</b>
AVERAGE DIRECT SUPPORT FROM PCR				\$ 46,184
<b>SUBTOTAL</b>				<b>\$ 238,777</b>
AVERAGE INDIRECT SUPPORT FROM PCR				\$ 15,425
C) FACILITIES x CPI	3.33%	x	\$ 12,327	\$ 12,737
<b>AVERAGE COST PER CLASSROOM</b>				<b>\$ 266,940</b>

AVERAGE COST PER STUDENT PER YEAR:				
# STUDENTS PER CLASSROOM (STANDARD)	PER STUDENT RATE	E) MINUS AVE BASE LCFF PLUS AB602 PER ADA <sup>1</sup>	AVERAGE COST PER STUDENT PER YEAR	
SDC 8	\$ 33,367	- \$ 7,467	\$ 25,900	
SDC 10	\$ 26,694	- \$ 7,467	\$ 19,227	
SDC 12	\$ 22,245	- \$ 7,467	\$ 14,778	
RSP/SAI	\$ 9,534	\$ -	\$ 9,534	

<sup>1</sup> IMPORTANT NOTE: IF DISTRICT OF SERVICE IS BASIC AID, CHANGE AMOUNT FROM \$7,467 TO \$444;  
IF STUDENT IS IN PRESCHOOL, CHANGE THIS AMOUNT TO ZERO (\$0)

ADDITIONAL COSTS PER STUDENT PER YEAR				
ADDITIONAL CLASSROOM AIDE	B)	\$ 62,380	10	6,238
F) SPEECH/LANGUAGE	D)	\$ 130,886	40	3,272
F) SPEECH/LANGUAGE	D)	\$ 130,886	55	2,380
F) ADAPTIVE PHYSICAL ED TEACHER (APE)		\$ 124,603	35	3,560
F) OCCUPATIONAL THERAPIST (OT)		\$ 131,916	35	3,769
F) NURSE		\$ 125,170	35	3,576
F) COUNSELOR		\$ 148,264	35	4,236
F) TRANSLATOR		\$ 75,250	35	2,150
F) VISION TEACHER (VI)		\$ 127,909	35	3,655
F) ORIENTATION & MOBILITY SPECIALIST (O&M)		\$ 103,910	35	2,969
F) OTHER SERVICES PER DISTRICT AGREEMENT (PLEASE SPECIFY):				
F) OTHER SERVICES PER DISTRICT AGREEMENT (PLEASE SPECIFY):				
F) OTHER SERVICES PER DISTRICT AGREEMENT (PLEASE SPECIFY):				
F) OTHER SERVICES PER DISTRICT AGREEMENT (PLEASE SPECIFY):				

REGIONAL/ACTUAL COST PROGRAM				
REGIONAL PROGRAM ACTUAL COST PER CLASSROOM PER YEAR:				
TEACHER SALARIES & BENEFITS				
AIDE SALARIES & BENEFITS				
ESTIMATED SUPPLIES				
<b>SUBTOTAL (A)</b>				
ADJUSTED PCR DIRECT SUPPORT (A1) see Appendix C				
<b>SUBTOTAL (B)</b>				
PCR INDIRECT COST (B1) see Appendix C				
C) FACILITIES x CPI				
<b>REGIONAL/ACTUAL PROGRAM COST PER CLASSROOM (C)</b>				<b>\$ 12,737</b>

ACTUAL COST PER STUDENT PER YEAR:				
# STUDENTS PER CLASSROOM				
PER STUDENT RATE (D)				#DIV/0!
E) MINUS AVE BASE LCFF PLUS AB602 PER ADA <sup>1</sup> (see Appendix C)				
<b>CALCULATED ACTUAL COST PER STUDENT PER YEAR</b>				<b>#DIV/0!</b>

<sup>1</sup> IMPORTANT NOTE: IF DISTRICT OF SERVICE IS BASIC AID, ONLY DEDUCT THE AB602 BASE RATE;  
IF STUDENT IS IN PRESCHOOL, CHANGE THIS AMOUNT TO ZERO (\$0)

ADDITIONAL COSTS PER STUDENT PER YEAR				
ADDITIONAL CLASSROOM AIDE				
F) SPEECH/LANGUAGE				
F) SPEECH/LANGUAGE				
F) ADAPTIVE PHYSICAL ED TEACHER (APE)				
F) OCCUPATIONAL THERAPIST (OT)				
F) NURSE				
F) COUNSELOR				
F) TRANSLATOR				
F) VISION TEACHER (VI)				
F) ORIENTATION & MOBILITY SPECIALIST (O&M)				
F) OTHER SERVICES PER DISTRICT AGREEMENT (PLEASE SPECIFY):				
F) OTHER SERVICES PER DISTRICT AGREEMENT (PLEASE SPECIFY):				
F) OTHER SERVICES PER DISTRICT AGREEMENT (PLEASE SPECIFY):				
F) OTHER SERVICES PER DISTRICT AGREEMENT (PLEASE SPECIFY):				

SUMMARY OF CHARGES TO DISTRICT OF RESIDENCE:			
REGIONAL/ACTUAL PROGRAM COST ? Y/N	DEC 1 ENROLLMENT	APRIL 1 ENROLLMENT	TOTAL AVERAGE COST
COST PER STUDENT PER YEAR			#DIV/0!
ADDITIONAL COSTS, IF ANY			#DIV/0!
<b>TOTAL COST</b>			<b>#DIV/0!</b>

A) Used 2019-20 Average Salary provided by NW SELPA Districts  
B) Used 2019-20 Average Salary provided by NW SELPA Districts  
C) See Appendix A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z

D) Average Teacher Salary/Benefits + District Support + Facilities/A  
E) Countywide Average Base LCP plus AB 602 per STUDENT times % of ADA to Enrollm.  
F) By agreement, District of Residence may choose to contract directly with Service Provider





FOR DECEMBER 1 ENROLLMENT

FOR APRIL 1 ENROLLMENT

DISTRICT OF SERVICE

NAME/SIGNATURE

DATE

NAME/SIGNATURE

DATE

DISTRICT OF RESIDENCE

NAME/SIGNATURE

DATE

NAME/SIGNATURE

DATE

## 2019-20 INTER-DISTRICT TRANSFERS REPORTING FORM

IMPORTANT NOTE: FOR EACH OF THE CENSUS DATES (DEC 1 AND APRIL 1), REPORT ALL DOLLAR AMOUNTS AS "FULL YEAR" COST. COSTS FOR DECEMBER 1 AND APRIL 1 WILL BE AVERAGED FOR FINAL COSTS.  
 SUBMIT A COMPLETED FORM TO SELPA AU.

STUDENT ID#	(a) COST PER STUDENT PER YEAR	(b) ADDITIONAL CLASSROOM AIDE	(c) SPEECH/LANGUAGE	(d) APE	(e) OT	(f) OTHER SERVICES, PLEASE SPECIFY	(g) OTHER SERVICES, PLEASE SPECIFY	(h) TOTAL	(i) IS THIS A REGIONAL/ ACTUAL COST PROGRAM? Y OR N
1	EXTENDED YR DEC 1 APR 1								
2	EXTENDED YR DEC 1 APR 1								
3	EXTENDED YR DEC 1 APR 1								
4	EXTENDED YR DEC 1 APR 1								
5	EXTENDED YR DEC 1 APR 1								
6	EXTENDED YR DEC 1 APR 1								
7	EXTENDED YR DEC 1 APR 1								

District-of-Service : please complete one form for each district sending students. 1) Fax to District-of-Residence for review & signature, and 2) Fax copy to SELPA AU.  
 District-of-Residence : please confirm charges, sign, and 1) fax to District-of-Service, 2) Fax to SELPA AU, attention: Karen Santiago (408) 453-4337.  
 District-of-Service's reported charges will be adjusted in the apportionment distribution process, unless clearly contested by the District-of-Residence.

# APPENDIX A

## Inter-district Transfers

### NW SELPAs AU

#### SELP A I

Los Altos SD  
Palo Alto Unified SD  
MV- Los Altos UHSD  
MV- Whisman SD

#### SELP A II

Fremont UHSD  
Sunnyvale SD  
Cupertino USD

#### SELP A III

Cambrian SD  
Campbell UHSD  
Campbell UHSD  
Lakeside JtSD

Loma Prieta JtUSD  
LG-Saratoga JtUHSD  
Los Gatos USD  
Luther Burbank SD  
Moreland SD  
Saratoga USD  
Union SD

#### SELP A IV

San Jose Unified SD

#### SELP A VII

Santa Clara Unified SD

Transfer of  
revenue between  
these districts is  
done via **Inter-  
District transfer  
forms and  
adjustment of  
apportionments**

### South-East SELPA AU

#### SE SELPA

Alum Rock USD  
Berryessa USD  
East Side UHSD  
Evergreen SD  
Franklin-McKinley SD  
Milpitas Unified SD  
Mt. Pleasant SD  
Oak Grove SD  
Orchard SD  
Gilroy Unified SD  
Morgan Hill Unified SD

Transfer of revenue between  
districts served by different SELPA  
AUs cannot be made via adjustment  
of apportionments and **District-of-  
Service must invoice District-of-  
Residence.**

## APPENDIX B

### **DRAFT 2019-20 List of Identified Regional and Actual Cost Programs**

#### **REGIONAL PROGRAM (R) DEFINITION:**

*Regional programs are programs that are developed in the SELPA to address an identified need of the member districts. The SELPA Operations Committee determines the need for a program and a LEA agrees to operate the program for the SELPA with the understanding that this program is available to the member LEAs.*

#### **ACTUAL COST PROGRAM (AC) DEFINITION:**

*Actual Cost Programs are programs that LEAs operate in which other LEAs may place students if space is available. These programs are higher cost than average cost programs (e.g. autism and ED programs).*

#### **AVERAGE COST PROGRAM (AV) DEFINITION:**

*Average Cost Programs are programs that are not high cost programs, such as SLD SDC and other programs that do not require additional aide support.*

*\*The number next to each AC/AV indicates the number of classrooms you have for that program.*

#### **SELPA I**

AC1 Moderate/Severe (K-3)	Los Altos SD
AC1 Moderate/Severe (4-6)	Los Altos SD
AC1 Moderate/Severe (7-8)	Los Altos SD
AC2 Mild/Moderate (1-3)	Los Altos SD
AC2 Mild/Moderate (4-6)	Los Altos SD
AC1 Mild/Moderate (7-8)	Los Altos SD
AC1 Therapeutic SDC ED (1-3)	Los Altos SD
AC1 Therapeutic SDC ED (4-6)	Los Altos SD
AC1 Therapeutic SDC ED (7-8)	Los Altos SD
AC2 Academic Communication (7-8)	Los Altos SD
AC1 SH (Secondary-Post Sec)	Mt.View/Los Altos UHSD
AC1 ID (Secondary)	Mt.View/Los Altos UHSD
AC4 ED	Mt.View/Los Altos UHSD
AC1 Mild/Moderate (Post Sec)	Mt.View/Los Altos UHSD
AC1 Mild/Moderate SDC (K-2)	Mt.View/Whisman SD
AC2 Mild/Moderate SDC (3-5)	Mt.View/Whisman SD
AC5 Mild/Moderate SDC (6-8)	Mt.View/Whisman SD
AC1 Medically Fragile OHI (K-7)	Mt.View/Whisman SD
AC1 Moderate/Severe Proj Search	Palo Alto Unified School District
AC1 Post Secondary	Palo Alto Unified School District
AC2 Therapeutic Support (Mid, HS)	Palo Alto Unified School District
AC1 Hearing Impaired/Deaf (HS)	Palo Alto Unified School District
AC3 OI (Elem, Mid, HS)	Palo Alto Unified School District

**0 Designated Regional Programs**

**37 Actual Cost Programs**

**SELPA II**

AC1 VI  
 AC1 DHOH  
 AC3 TSDC (Elem, Mid)  
 AC3 ASD Classes (Elem, Mid)  
 AC16 Moderate/Severe (Elem, Mid)  
 AC12 Mild/Moderate (Elem)  
 AC2 OI (PreK, Elem)  
 AC4 TSDC (Elem, Mid)  
 AC8 ASD Classes  
 AC1 Hearing Impaired (Elem)  
 AC4 Moderate/Severe Classes  
**0 Designated Regional Programs**  
**55 Actual Cost Programs**

Cupertino Union School District  
 Cupertino Union School District  
 Cupertino Union School District  
 Cupertino Union School District  
 Cupertino Union School District  
 Cupertino Union School District  
 Sunnyvale School District  
 Sunnyvale School District  
 Sunnyvale School District  
 Sunnyvale School District  
 Sunnyvale School District

**SELPA III**

AC3 Preschool classes  
 AC1 Soc.Thinking (K-2)  
 AC1 Soc.Thinking (3-5)  
 AC1 Soc.Thinking (6-8)  
 AC1 Moderate/Severe (TK-3)  
     Mild/Moderate (Elem)  
     Mild/Moderate (Mid)  
     Moderate/Severe preschool  
 AC3 Preschool  
 AC2 Therapeutic Model  
 AC5 Moderate/Severe  
 AC1 Autism classes  
 AC5 Therapeutic Model  
 AC3 Therapeutic Model classes/Satellite  
 AC5 Moderate/Severe classes  
 AC2 Post Secondary  
 AC1 Moderate/Severe (K-3)  
 AC2 Mild/Moderate (elementary)  
 AC1 Mild/Moderate (middle school)  
 AC1 Therapeutic Model  
 AC2 Moderate/Severe  
 AC1 Post Secondary  
 AC1 Moderate/Severe preschool  
 AC1 Therapeutic Model (2-5)  
 AC3 Moderate/Severe  
 AC1 Preschool  
 AC1 Moderate/Severe  
 AC2 Moderate/Severe preschool  
 AC3 Moderate/Severe  
**0 Designated Regional Program**  
**55 Actual Cost Programs**

Cambrian  
 Cambrian  
 Cambrian  
 Cambrian  
 Cambrian  
 Campbell Union  
 Campbell Union  
 Campbell Union  
 Campbell Union  
 Campbell Union  
 Campbell Union  
 Campbell Union High  
 Campbell Union High  
 Campbell Union High  
 Campbell Union High  
 Loma Prieta  
 Los Gatos  
 Los Gatos  
 Los Gatos/Saratoga High  
 Los Gatos/Saratoga High  
 Los Gatos/Saratoga High  
 Moreland  
 Moreland  
 Moreland  
 Saratoga  
 Saratoga  
 Union  
 Union

**SELPA IV**

AC5 ED (6-12)

AC3 ASD (6-8)

AC4 ASD (9-12)

AC4 Autism preschool

AC7 ASD (K-5)

AC1 ED (K-5)

AC5 Moderate/Severe (K-5)

AC3 Mild/Moderate preschool

AC2 Post Secondary

AC2 SH preschool

**0 Designated Regional Programs****36 Actual Cost Programs**

San Jose Unified

San Jose Unified

San Jose Unified

San Jose Unified

San Jose Unified

San Jose Unified

San Jose Unified

San Jose Unified

San Jose Unified

San Jose Unified

**SELPA VII**

AC\_\_ Preschool classes

AC\_\_ ED (K-12)

AC\_\_ Mild/Moderate RSP SDC Basic-Secondary (K-12)

AC\_\_ Moderate/Severe (K-12)

AC\_\_ Post Secondary

AC\_\_ Autism SDC (K-12)

RC\_\_ DHOH (K-5)

AC\_\_ DHOH Itinerant (K-12)

AC\_\_ VI (K-5)

AC\_\_ VI Itinerant (K-12)

**1 Designated Regional Programs****Actual Cost Programs**

Santa Clara Unified

Santa Clara Unified

Santa Clara Unified

Santa Clara Unified

Santa Clara Unified

Santa Clara Unified

Santa Clara Unified

Santa Clara Unified

Santa Clara Unified

Santa Clara Unified

# APPENDIX C

\*\*AUTOMATIC UPDATES\*\*

## DIRECT SUPPORT AND INDIRECT COST RATES - NW SELPA DISTRICTS

AS REPORTED ON DISTRICT 2018-19 PROGRAM COST REPORTS (EXCLUDES DOCUMENTED AND ALLOCATED DIRECT SUPPORT COSTS FOR SPECIAL ED TRANSPORTATION)

DISTRICT	DIRECT COSTS		% OF DIRECT SUPPORT	INDIRECT COSTS		LESS: DIRECT TRANSPORTATION	LESS: ALLOCATED TRANSPORTATION	ADJUSTED DIRECT SUPPORT
	DIRECT CHARGED	ALLOCATED		CENTRAL ADMIN COSTS	% OF INDIRECT COST			
	A	B	C = (B/A)	E	F = (E/D)	G	H	I = (B+H)/(A+G)
LOS ALTOS	11,964,647.43	3,454,805.41	28.88%	1,119,119.35	7.26%	(384,136.05)	-	29.83%
PALO ALTO	47,688,021.49	9,403,458.58	19.72%	3,136,117.17	5.49%	(407,248.05)	(1,409,584.36)	16.91%
MVLA	16,940,592.97	4,596,408.20	27.13%	1,769,612.95	8.22%	(959,039.71)	-	28.76%
MV WHISMAN	15,673,082.34	1,863,331.33	11.89%	1,301,509.95	7.42%	(506,384.95)	(174,207.87)	11.14%
FREMONT	36,975,253.44	11,070,928.50	29.94%	2,688,971.75	5.60%	(2,140,992.20)	-	31.78%
SUNNYVALE	22,361,284.41	11,595,601.72	51.86%	2,488,158.86	7.33%	(1,191,202.42)	(221,281.00)	53.73%
CUPERTINO	39,720,717.93	9,924,721.76	24.99%	2,992,760.05	6.03%	(3,014,906.38)	-	27.04%
CAMBRIAN	7,425,546.66	229,753.31	3.09%	594,175.08	7.76%	(557,020.28)	-	3.35%
CAMPBELL ELEM	15,043,830.60	2,174,866.81	14.46%	903,592.00	5.25%	(350,415.38)	-	14.80%
CAMPBELL HIGH	17,667,241.96	3,798,832.75	21.50%	1,686,769.56	7.86%	(1,333,150.70)	(516,361.90)	20.10%
LOMA PRIETA	1,179,280.99	34,495.85	2.93%	1,213,776.84	14.79%	(9,006.77)	-	2.95%
LG-SARATOGA	9,902,127.12	1,447,040.23	14.61%	11,349,167.35	7.41%	(644,551.86)	(552.68)	15.62%
LOS GATOS	5,320,073.46	293,847.55	5.52%	406,536.97	7.24%	(106,016.87)	-	5.64%
LUTH BURBANK	742,299.30	38,257.48	5.15%	104,954.40	13.45%	(94,560.73)	-	5.91%
MORELAND	11,528,388.16	2,121,185.62	18.40%	944,424.68	6.92%	(180,290.54)	-	18.69%
SARATOGA	6,002,443.68	568,144.70	9.47%	719,489.18	10.95%	(180,296.33)	-	9.76%
UNION	11,754,920.16	1,254,156.42	10.67%	865,152.05	6.65%	(631,469.06)	-	11.27%
LAKESIDE	769,646.47	132,444.90	17.21%	104,815.32	11.62%	-	(3,624.96)	16.74%
SAN JOSE	63,839,317.42	19,760,571.70	30.95%	4,782,245.55	5.72%	(5,474,961.78)	-	33.86%
SANTA CLARA	54,285,986.82	9,196,887.61	16.94%	4,017,752.12	6.33%	(3,996,117.56)	(781,602.95)	16.73%
<b>TOTAL</b>	<b>396,784,702.81</b>	<b>92,959,740.43</b>	<b>18.27%</b>	<b>31,646,748.79</b>	<b>7.96%</b>	<b>(22,161,767.62)</b>	<b>(3,107,215.72)</b>	<b>18.73%</b>

ADJUSTED AVERAGE DIRECT SUPPORT  
AVERAGE INDIRECT

23.98% (B+H)/(A+G)

6.46% (E/D)

# APPENDIX C

\*\* AUTOMATIC UPDATES \*\*

## AVERAGE LCFF BASE FOR INTERDISTRICT TRANSFERS - NW SELPA DISTRICTS

DISTRICT	2018-19 P2 BASE GRANT FUNDING FROM STATEWIDE LCFF SNAPSHOT	2018-19 P2 TOTAL ADA SNAPSHOT	WEIGHTED AVE LCFF	AVE % OF SDC ADA/SDC ENROLLMENT ADJ	ADJUSTED LCFF/STUDENT ENROLLED	2018-19 AB602 BASE RATE PER ADA FROM SELPA REV PROJECTION	2018-19 AB602 PER STUDENT ENROLLED	2018-19 AVE ADJ LCFF PER STUDENT PLUS ADJ AB602 BASE RATE PER STUDENT	WEIGHTED AVE AB602 BEFORE ADJ TIMES ADA
	A	B	C = (A/B)	D	E = (C*D)	F	G = (D*F)	H = (E+G)	I = (B*F)
LOS ALTOS	33,901,655	4,293.51	7,896	84%	6,633	517.18	434.43	7,067	2,220,515
PALO ALTO	93,340,243	11,165.36	8,360	84%	7,022	517.18	434.43	7,457	5,774,493
MV-LA	39,110,824	4,219.53	9,269	84%	7,786	517.18	434.43	8,220	2,182,254
MV-WHISMAN	39,428,663	4,969.98	7,933	84%	6,664	517.18	434.43	7,098	2,570,371
FREMONT	99,773,370	10,764.20	9,269	84%	7,786	527.71	443.28	8,229	5,680,423
SUNNYVALE	51,016,599	6,411.64	7,957	84%	6,684	527.71	443.28	7,127	3,383,515
CUPERTINO	139,371,898	17,626.32	7,907	84%	6,642	527.71	443.28	7,085	9,301,663
CAMBRIAN	8,182,997	1,030.25	7,943	84%	6,672	534.34	448.84	7,121	550,501
CAMPBELL UESD	3,982,584	496.85	8,016	84%	6,733	534.34	448.84	7,182	265,486
CAMPBELL UHSD	73,502,892	7,929.97	9,269	84%	7,786	534.34	448.84	8,235	4,237,280
LOMA PRIETA	3,785,072	481.50	7,861	84%	6,603	534.34	448.84	7,052	257,283
LG-SARATOGA	31,458,801	3,393.98	9,269	84%	7,786	534.34	448.84	8,235	1,813,530
LOS GATOS UESD	24,059,123	3,056.96	7,870	84%	6,611	534.34	448.84	7,060	1,633,448
LUTHER BURBANK	3,983,591	503.41	7,913	84%	6,647	534.34	448.84	7,096	268,991
MORELAND	36,817,482	4,647.57	7,922	84%	6,654	534.34	448.84	7,103	2,483,370
SARATOGA	14,059,762	1,788.64	7,861	84%	6,603	534.34	448.84	7,052	955,737
UNION	45,436,019	5,748.33	7,904	84%	6,640	534.34	448.84	7,088	3,071,548
LAKESIDE	580,052	72.25	8,028	84%	6,744	534.34	448.84	7,193	38,606
SAN JOSE UNIF	238,118,870	28,503.82	8,354	84%	7,017	525.68	441.57	7,459	14,983,835
SANTA CLARA UNIF	123,028,996	14,797.16	8,314	84%	6,984	538.76	452.56	7,437	7,972,085
<b>TOTAL</b>	<b>1,102,939,493</b>	<b>131,901</b>							<b>69,644,933</b>
<b>AVERAGE</b>		<b>8,362</b>							<b>528</b>

Funded Ave (1.003)

9,248.80

AVE % OF SDC ADA/SDC			
AVE LCFF	AMOUNT	ENROLLMENT ADJ	TOTAL
8,362 *	8,362 *	84%	7,024
528 *	528 *	84%	444
<b>TOTAL</b>	<b>8,890</b>		<b>7,467</b>



## SPECIAL EDUCATION INTER-DISTRICT TRANSFER PROCEDURE

### 1. INTRODUCTION

As part of the Special Education Local Plan Areas I's, II's, III's, IV's, and VII's efforts to coordinate the provision of a full continuum of special education and related services options, and as a means of ensuring that students with disabilities receive a free and appropriate public education (FAPE) in the least restrictive environment, districts may enter into agreements whereby students can be placed in other district special education programs where the IEP team deems it appropriate ("IEP Team referrals"). In addition, students receiving special education services may seek to attend school in a district other than their district of residence via a parent request ("inter-district transfers"). A uniform method of handling these IEP Team referrals and inter-district transfers among member districts will promote a fast, efficient and fair functioning of the inter-district school attendance system in Santa Clara County; which benefit will accrue to the affected students.

It is the intent of the parties to this policy that students with disabilities are treated in a manner equal to their non-disabled peers in the administration of special education referrals and related inter-district attendance agreements.

### 2. DEFINITION OF TERMS

2.1 District of Attendance: The District to which a transfer is sought ("DOA").

2.2 District of Residence: The District of the Parent(s) resident ("DOR").

2.3 Parent: The student's parent(s) or legal guardian(s).

3. TRANSFER OF PUPILS UNDER THE PROVISIONS OF EDUCATION CODE SECTION 46600 (i.e., inter-district attendance at parents request for reasons other than employment).

#### 3.1 PROCEDURE

3.1.1 All requests for transfer shall first be approved by the DOR which will also include approval of payment of costs required to be paid to the DOA under this policy.

3.1.2 All requests for transfer shall be submitted to potential DOA's representative on the basis of available classroom space and other criteria determined by the DOA.

3.1.3 School assignment shall be designated by the DOA's representative on the basis of available classroom space and other criteria determined by the DOA.

### 3.2 ACCEPTANCE/DENIAL CONSIDERATIONS

3.2.1 Nothing in these procedures requires a district to admit a student under an inter-district transfer. However, denial of an inter-district transfer request cannot be based upon race, ethnicity, sex, disability, parental income, scholastic achievement or other arbitrary consideration. Non-arbitrary considerations, such as class/program space or availability, are proper considerations for the acceptance/denial decision.

3.2.2. A pupil who has been determined by personnel of either the DOR or DOA to have been the victim of an act of bullying, as defined in subdivision (r) of Section 48900, committed by a pupil of the DOR shall, at the request of the person having legal custody of the pupil, be given priority for interdistrict attendance.

### 3.3 DURATION/RENEWAL

3.3.1 Transfers under this Section are for a maximum duration of one year, and parents of students seeking such an inter-district transfer must reapply each year for the requested transfer. However, a DOR or a DOA shall not rescind existing transfer permits for pupils entering grade 11 or 12 in the subsequent school year.

3.3.2 Individual transfer agreements may stipulate terms and conditions established by the DOR and DOA under which the permit may be revoked, in compliance with law.

### 3.4 INTER-DISTRICT RESPONSIBILITIES

3.4.1 Except as enumerated in Education Code §46607, the DOA shall receive credit for the average daily attendance of students transferred to it under this section.

3.4.2 All costs for special education students, (over and above ADA), shall be the responsibility of the DOR, and the DOA shall bill the DOR pursuant to the SELPA Cost Calculation Formula.

3.4.3 Any and all costs for special education assessment of a student not previously identified as a student with a disability under the IDEA, 20 U.S.C. §1400 et seq., required by the student shall be the primary responsibility of the DOA.

- 3.4.4 The DOR shall be notified with regard to any assessment of the student, and shall be notified of the IEP team meeting in a timely manner.
- 3.4.5 If a student is deemed eligible and in need of special education and related services, the DOA will provide special education and related services for the remainder of the school year. The DOA will bill the DOR for services provided pursuant to the SELPA Cost Calculation Formula. Any decision to place in a non-public school or other out of DOA placement such as COE shall include the DOR, and any resulting such placement shall be the responsibility of the DOR.

3.5 DENIAL NOTIFICATION

- 3.5.1 Upon denial of an inter-district transfer request, the student shall have appeal rights pursuant to Education Code §46601. Student should be informed of these appeal rights.

4. TRANSFER OF PUPILS UNDER THE PROVISIONS OF EDUCATION CODE SECTION 48204 (i.e., inter-district attendance based upon employment-related reasons).

4.1 PROCEDURE

- 4.1.1 The student's parent must provide acceptable verification of employment within the boundaries of the potential DOA. Employment must be for a minimum of 10 hours during the school week.
- 4.1.2 All requests for transfer shall first be approved by the DOR.
- 4.1.3 All requests for transfer shall be submitted to potential DOA's director of special education for review and action.
- 4.1.4 School assignment shall be designated by the DOA's representative on the basis of available classroom space and other criteria determined by the DOA.
- 4.1.5 The parents of a student accepted for transfer under this section must immediately notify the DOR and DOA administrators of the termination of his/her employment within the boundaries of the DOA. This shall result in the expiration of any transfer agreement. The parent may request continuance of the attendance in the DOA on an Education Code §46600 basis for the remainder of the current school year.

4.2 ACCEPTANCE/DENIAL CONSIDERATIONS

- 4.2.1 Nothing in these procedures requires a district to admit a student claiming residence based upon parental employment to its schools. The district may not, however, refuse to admit students based upon race, ethnicity, sex, disability, parental income, scholastic achievement or other arbitrary consideration.

- 4.2.2 A request may be denied based upon inadequate employment verification.
- 4.2.3 A request may be denied based upon inadequate classroom space.
- 4.2.4 Either the DOA or the DOR may prohibit the transfer if the governing board determines that the transfer would negatively impact the district's court-ordered or voluntary desegregation plan.
- 4.2.5 The DOA may prohibit the transfer if there is a determination that the cost of educating the pupil would exceed the amount of additional state aid received as a result of the transfer.
- 4.2.6 The DOR may prohibit the transfer if the transfer would exceed specified percentages of average daily attendance for the district as enumerated in Education Code §48204(b)(6).

#### 4.3 DURATION/RENEWAL

- 4.3.1 The decision to admit a student pursuant to this section is a matter of discretion, as enumerated above. However, if a transfer pursuant to this section is granted, the student is deemed a resident of the DOA. Consequently, so long as a parent remains employed in the DOA, the student has the right, should he so desire, without reapplication, to attend school in the DOA through the twelfth grade.

#### 4.4 INTER-DISTRICT RESPONSIBILITIES

- 4.4.1 Except as enumerated in Education Code §46607, the DOA shall receive credit for the average daily attendance of students transferred to it under this section.
- 4.4.2 Any and all costs for special education services required by the student shall be the primary responsibility of the DOA, which is also deemed the DOR.

#### 4.5 DENIAL NOTIFICATION

- 4.5.1 The District that prohibits the transfer of a student under this section is encouraged to identify, and communicate in writing to the student's parents, the specific reasons for that determination.

#### Approved:

SELPA I	10/20/05	10/21/10	06/19/12	02/11/16
SELPA II	10/21/05	10/29/10	06/19/12	02/13/15
SELPA III	10/20/05	10/21/10	06/19/12	02/12/15
SELPA IV	10/27/05	10/20/10	06/20/12	02/13/15
SELPA VII	10/26/05	10/20/10	06/20/12	02/11/15

## **APPENDIX F**

### **CALCULATION OF DISTRICT SHARE OF SCCOE SPECIAL ED PROGRAM COSTS**

1. Historical Block Classes
2. Historical Bock Rates
3. 2019-20 Re-benched Block Rates
4. Summary of 2019-20 Estimated SCCOE Special Education Funding (*Preliminary Calculation*)
  - a) Summary of Estimated Costs and Revenue
  - b) Other Revenue Sources
  - c) Summary of Estimated Costs by District
  - d) Estimated Cost of COE Block program classes, by district
  - e) SCCOE Facilities fees and compensation
  - f) Average SCCOE Special Ed Block Enrollment
  - g) Special Education Services in SCCOE Alternative Schools
  - h) Estimated Cost of serving LCI pupils
  - i) Estimated Share by ADA of LCI cost
  - j) Total Estimated Costs by district
  - k) Calculation of 1:1 SPHC Aide hours
  - l) Calculation of 1:1 Regular Aide hours
5. COE Special Education Facilities Policy
  - a) COE Minimum Classroom Requirements
  - b) COE Classroom Custodial Requirements

## HISTORICAL SCCOE BLOCK CLASSES INFORMATION

BLOCK	DEC/APR AVE Classes 2001/2002	DEC/APR AVE Classes 2002/2003	DEC/APR AVE Classes 2003/2004	DEC/APR AVE Classes 2004/2005	DEC/APR AVE Classes 2005/2006	DEC/APR AVE Classes 2006/2007	DEC/APR AVE Classes 2007/2008	DEC/APR AVE Classes 2008/2009	DEC/APR AVE Classes 2009/2010	DEC/APR AVE Classes 2010/2011	DEC/APR AVE Classes 2011/2012
Basic	82.5	85	81	82.5	78	77	76.5	71.0	70	72	74
Autism	30.5	34	38	44	48	54	52	48	46	46.5	45
SNF-OI	0	0	0	1	3	3	3	3	3	3	3
E.D.	9	10	11	17	17	15.5	16	17	17	14	14
L.I. O.I.	14	14	16	16	15	14	15	15	15	16	15
L.I. Deaf	14	15	15	15	15	15.5	16	16	16	16	16
Med. Fragile	12	11	11	13	16	18	17	15	13	12.5	13
NPS Pilot	6	5	5	0	0	0	0	0	0	0	0
Sub- Total Blocks	168	174	177	188.5	192	197	195.5	185	180	180	180
ASD Resource	7	4	3	3	4	4	4.5	5	5	5	4.5
ASD Intensive	2	6	6	6	6	6	7	6	6	6	3
TOTAL Including ASD	177	184	186	197.5	202	207	207	196	191	191	187.5

BLOCK	DEC/APR AVE Classes 2012/2013	DEC/APR AVE Classes 2013/2014	DEC/APR AVE Classes 2014/2015	DEC/APR AVE Classes 2015/2016	DEC/APR AVE Classes 2016/2017	Oct - Apr Average Classes 2017/18	Oct - Apr Average Classes 2018/19	Estimated Average Classes 2019/20
Basic	75	79.5	77.5	77	78.75	78.5	73.9	73.5
Autism	45	44.5	42.5	39.5	41	42	41.9	40
SNF-OI	3	3	3	0	3	3	2.5	2.5
E.D.	14	14	11	12	9.5	10.3	9.1	9.0
L.I. O.I.	14	12	12	15	12.75	11.5	11.5	11.5
L.I. Deaf	15.5	15	15	14	14	14	14.0	14
Med. Fragile	13	14	14	13	14	13	12.0	12
NPS Pilot	0	0	0	0	0	0	0.0	0
Sub- Total Blocks	179.5	182	175	170.5	173	172.3	164.9	162.5
ASD Resource	4.5	3.6	3.6	3	3	3	3.0	3
ASD Intensive	3	5	5	6.5	6	5	4.0	5
TOTAL Including ASD	187	190.6	183.6	180	182.0	180.3	171.9	170.5

# HISTORICAL SCOE BLOCK RATES INFORMATION

Block	1997/98 Actuals \$ per class	(3.95% COLA) 1998/99 Rate \$ per class	(1.41% COLA) 1999/00 Rate \$ per class	(3.17% COLA) 2000/01 Rate \$ per class	(7.37% inc) 2001/02 Rate \$ per class	(2.0% COLA) 2002/03 Rate \$ per class	Remove Facilities (\$9,057) for 2003/04	(1.5% inc) 2003/04 Rate \$ per class	Mid-Yr Adj 2003/04 Rate \$ per class	Re-benchmarked 2004/05 Rate \$ per class	(ED) Re-benchmarked (4.23% COLA) 2005/06 Rate \$ per class	Re-benchmarked & 5.92% COLA 2006/07 Rate \$ per class	(ED) Re-benchmarked (4.53% COLA) 2007/08 Rate \$ per class
Basic	191,637	199,207	202,015	208,419	223,780	228,255	219,198	222,486	229,359	227,837	237,475	250,209	261,543
Autism	219,048	227,700	230,911	238,231	255,788	260,904	251,847	255,625	262,496	264,058	275,228	290,934	304,113
Inclusion**	206,757	214,924	217,954	224,863									
E. D.	198,250	206,081	208,987	215,611	231,502	236,132	227,075	230,481	237,354	233,731	285,015	296,628	321,272
L.I. (OI)	242,732	252,320	255,878	263,989	283,445	289,114	280,057	284,258	291,131	306,366	319,325	340,410	355,831
L. I. (Deaf)	253,282	263,854	266,854	274,926	284,526	290,217	281,160	285,377	292,249	302,887	315,699	333,331	348,431
Med. Fragile	223,238	232,056	235,328	242,788	260,681	265,895	256,838	260,690	267,562	265,935	277,184	303,332	317,073
NPS Pilot	267,467	278,032	281,952	290,890	312,329	318,575	309,518	314,161	321,032	325,927			
1:1 Aide rate				3,516	3,801	3,877	3,877	3,935	4,642	4,754	4,955	5,248	5,486
1:1 Health Aide													
ASD -RSP*	114,060	118,565	120,237	124,049	133,191	201,804	201,804	204,831	204,831	209,767	218,640	232,464	242,995
ASD -SDC*	111,099	115,487	117,116	120,828	129,733	175,870	175,870	178,508	178,508	182,811	190,544	202,271	211,434

Block	2008/09	Adjusted											
		Re-benchmarked 2009/10 Rate \$ per class	Re-benchmarked 2010/11 Rate \$ per class	Re-benchmarked 2011/12 Rate \$ per class	2012/2013 Rate \$ per class	Re-benchmarked 2013/2014 Rate \$ per class	2014/2015 Rate \$ per class	Re-benchmarked 2015/2016 Rate \$ per class	Re-benchmarked 2016/2017 Rate \$ per class	Adjusted FAL Re-benchmarked 2017/18 Rate \$ per class	Adjusted May 2018 Re-benchmarked 2018/19 Rate \$ per class	Re-benchmarked 2019/20 Rate \$ per class	
Basic		294,985	293,864	308,821	320,697	335,475	335,475	361,281	380,060	412,651	421,333	426,483	
Autism		342,046	340,746	347,404	360,028	376,183	376,183	407,248	452,933	476,114	483,161	486,993	
SNF-OI***		352,308	350,969	336,522	349,248	364,993	364,993	385,662	403,477	438,284	445,317	455,039	
E. D.		329,240	327,989	331,140	353,161	380,352	380,352	406,288	467,261	460,249	466,867	457,962	
L.I. (OI)		352,308	350,969	336,522	349,248	364,993	364,993	385,662	403,477	438,284	445,317	455,039	
L. I. (Deaf)		373,204	371,786	428,675	426,280	451,126	451,126	485,034	520,565	577,510	560,078	566,836	
Med. Fragile		343,741	342,435	313,366	326,094	351,712	351,712	383,737	413,948	449,435	462,274	470,018	
NPS Pilot**													
1:1 Aide rate		5,486.14	5,486.14	6,568.10	8,076	8,744	8,744	8,885	9,160	9,640	9,594	9,784	
1:1 Health Aide		7,853.08	7,853.08	8,287.69	9,064	9,734	9,734	9,709	10,359	10,653	11,153	11,269	
ASD -RSP*		243,338	242,413	246,452	259,375	275,982	275,982	290,493	301,632	328,502	328,739	331,522	
ASD -SDC*		212,003	211,197	203,250	214,928	227,858	227,858	240,682	251,215	275,444	275,931	277,673	

2001/2002 Inclusion Block discontinued in 2001/2002

2002/2003 Sp Ed services in ASD

re-benchmarked for 2002/2003

new formula used for Calculation

2003/2004 Mid-year Adjustment to avoid deficit in 2003/2004

2004/2005 All Blocks Re-benchmarked for 2004/2005, except Sp. Ed. in Alternative Schools

Sp.Ed. in Alternative Schools increase by COLA (2.41%) in 2004/2005

2005/2006\*\*NPS Pilot folded into ED Block

SNF Block @ OI rate for SDC classes at SN Mid-year Adjustment to ED Block in 2005/2006 for Menta

2006/2007 Re-benchmarked Rate adjustment to a 5.92% COLA in 2006/2007

2007/2008 Assumes Re-benchmarked Rate adjustment to ED Block for Mental Health component and a 4.5: 2019/2020 Re-benchmarked Rates

2008/2009 Some classes collapsed/reconfigured with intent to not raise costs to districts in 2008/2009.

2009/2010 Re-benchmarking in 2009/2010

2010/2011 Negative COLA applied to Blocks in 2010/2011

2011/2012 Re-benchmarking for 2011/2012, 1:1 Aide Rates increased to Actual Costs, and then temporarily redi

2012/2013 Increased rates most programs, 1:1 rate resumes actual costs

2013/2014 Re-benchmarked Rates

2014/2015 same rates as 2013/2014

2015/2016 Re-benchmarked Rates

2016/2017 Re-benchmarked Rates

2017/2018 Re-benchmarked Rates

2018/2019 Re-benchmarked Rates

2019/2020 Re-benchmarked Rates

SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING  
2019-20 ESTIMATE FOR BLOCK RATES

Basic Block

Classroom Costs:		Position	FTE	Avg. Costs	Cost Per Class (19 ESY)	# Students per FTE
Classroom Count:	73.5	Teacher	1.000	X 156,250 =	156,250	8.63
February 2019 Enrollment:	634	Aide	1.407	X 71,807 =	101,032	6.13
		DIS/APC VJ OM/WRKexp/InSpec	0.131	X 155,776 =	20,329	66.10 *
		SLP	0.180	X 164,218 =	29,559	47.92 *
		OT/PT	0.138	X 155,073 =	21,483	62.51 *
		Nurse	0.065	X 177,798 =	11,557	132.71 *
		Psychologist	0.045	X 161,727 =	7,278	131.69 *
Avg Class Size Based On Projections:	8.63	Adj. for Classes Not Operating in ESY (See note)			(2,246)	
Subtotal - Classroom Cost					345,242	

Allocation of Shared Costs (Equally distributed to classrooms in all blocks):

Instructional Administration (Director, Principal, SOC, Asst. Director*)	31,944
Other Support Staff (Job Training Specialist, Fin. Analyst)	1,464
Substitute for Teachers and Aides	3,502
Custodial/Maintenance/Operations	865
Utilities	1,039
Repairs	42
Communications	718
Materials and Supplies (Admin, Support Staff & Classrooms)	3,079
Contracted Services	1,029
Legal Costs	431
Other Direct Services (Technology, Food Production)	261
Mileage & Travel	964
Rentals (Copier Charges)	689
Subtotal - Shared Cost	46,027
Total Direct Cost	391,269

Total Direct Cost	391,269
Indirect Cost (object code 7000)	35,214
Total - Basic with Indirect Cost	426,483

Note: Extended School Year (ESY) Salaries + Benefits  
(A) X .095 (19 days of ESY / 199 total instructional days) = (B)  
(B) X (# of classes not operating in ESY) = (C)  
(C) / 73.5 (# of classes in Basic) = 2.246

\* Student per FTE if total assignment were students in the Basic block.

Estimated Cost Per Student (Based on February 2019 Block Count) :		Est. Cost per Student
Per Class Cost	Total Enrollment	
Est. Per Class	634	\$ 31,946,501 / 634 = \$ 49,442
MOULT & Offsets	634	\$ 12,896,815 / 634 = \$ 4,559
Est. Cost		\$ 387,071

Special Education Rebenching  
March 8, 2019

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SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING  
2019-20 ESTIMATE FOR BLOCK RATES

Autism Block

Classroom Costs:		Position	FTE	Avg. Costs	Cost Per Class (19 ESY)	# Students per FTE
Classroom Count:	40	Teacher	1.000	X 156,250 =	156,250	8.63
February 2019 Enrollment:	345	BCBA Analyst	0.041	X 144,187 =	5,885	211.31
		Aide	1.407	X 71,807 =	101,032	6.13
		DIS/APC VJ OM/WRKexp/InSpec	0.131	X 155,776 =	20,329	66.09 *
		SLP	0.180	X 164,218 =	29,559	26.54 *
		OT/PT	0.138	X 155,073 =	21,483	36.70 *
		Nurse	0.065	X 177,798 =	11,557	148.71 *
		Psychologist	0.045	X 161,727 =	7,278	86.25 *
Avg Class Size Based On Projections:	8.63	Adj. for Classes Not Operating in ESY (See note)				
Subtotal - Classroom Cost					402,756	

Allocation of Shared Costs (Equally distributed to classrooms in all blocks):

Instructional Administration (Director, Principal, SOC, Asst. Director*)	31,944
Other Support Staff (Job Training Specialist, Fin. Analyst)	1,464
Substitute for Teachers and Aides	3,502
Custodial/Maintenance/Operations	865
Utilities	1,039
Repairs	42
Communications	718
Materials and Supplies (Admin, Support Staff & Classrooms)	3,079
Contracted Services	1,029
Legal Costs	431
Other Direct Services (Technology, Food Production)	261
Mileage & Travel	964
Rentals (Copier Charges)	689
Subtotal - Shared Cost	46,027
Total Direct Cost	448,783

Total Direct Cost	448,783
Indirect Cost (object code 7000)	40,210
Total - Autism with Indirect Cost	488,993

Note: ESY: Salaries + Benefits  
(A) X .095 (19 days of ESY / 199 total instructional days) = (B)  
(B) X (# of classes not operating in ESY) = (C)  
(C) / 40 (# of classes in Autism) =

\* Student per FTE if total assignment were students in the Autism block.

Estimated Cost Per Student (Based on February 2019 Block Count) :		Est. Cost per Student
Per Class Cost	Total Enrollment	
Est. Per Class	345	\$ 19,479,720 / 345 = \$ 56,463
MOULT & Offsets	345	\$ 1,276,498 / 345 = \$ 4,570
Est. Cost		\$ 21,756,218

Special Education Rebenching  
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**SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING  
2019-20 ESTIMATE FOR BLOCK RATES**

**ED Block**

Classroom Costs:					# Students per FTE
Classroom Count:	Position	FTE	Avg. Costs (19 ESY)	Cost Per Class (19 ESY)	
9	Teacher	1.000	X 156,250 *	156,250	7.33
	BCBA Specialist/Analyst	0.041	X 144,187 *	5,885	179.67
	Aide	1.407	X 71,807 *	101,032	5.21
February 2019 Enrollment: 66	DISAPE/VO, W/Exp, IncSpec	0.131	X 155,776 *	20,329	56.19
	SLP	0.000	X 164,218 *	-	-
	OT/PT	0.026	X 155,673 *	4,048	282.05
	Nurse	0.058	X 177,798 *	10,312	126.44
Avg Class Size Based On Projections: 7.33	Psychologist	0.122	X 161,727 *	19,731	60.11
	School Therapist	0.500	X 146,056 *	73,028	14.67
	Therapy Contracts - ED Only				
	Adj. for Classes Not Operating in ESY (See note)			(35,493)	
	<b>Subtotal - Classroom Cost</b>			<b>374,122</b>	

**Allocation of Shared Costs (Equally distributed to classrooms in all blocks):**

Instructional Administration (Director, Principal, SOC, Asst. Director*)	31,944
Other Support Staff (Job Training Specialist, Fin Analyst)	1,464
Substitute for Teachers and Aides	3,502
Custodial/Maintenance/Operations	865
Utilities	1,039
Repairs	42
Communications	718
Materials and supplies (Admin, Support Staff & Classrooms)	3,079
Contracted Services	1,029
Legal Costs	431
Other Direct Services (Technology, Food Production)	261
Mileage & Travel	964
Rentals (Copier Charges)	689
<b>Subtotal - Shared Cost</b>	<b>46,027</b>
<b>Total Direct Cost</b>	<b>420,149</b>

<b>Total Direct Cost</b>	420,149
Indirect Cost (object code 7000)	37,813
<b>Total - ED with Indirect Cost</b>	<b>457,963</b>

Note: ESY: Salaries + Benefits  
 (A) X .095 (19 days of ESY / 199 total instructional days  
 (B) X (# of classes not operating in ESY)  
 (C) / 9 (# of classes in ED) =

\* Student per FTE if total assignment were students in the ED block.

Estimated Cost Per Student (Based on February 2019 Block Count):				
Final cost will be determined by using based on October 2019 through April 2020 estimate				
Est. Per Class	Per Class Cost	Total	Enrollment	Est. Cost per Student
MOU & Offices	\$ 457,962	\$ 4,121,658	66	\$ 62,449
Est. Cost	\$ (39,412)	\$ (394,732)	66	\$ (5,974)
	<b>\$ 418,550</b>	<b>\$ 3,766,946</b>		<b>\$ 57,075</b>

**SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING  
2019-20 ESTIMATE FOR BLOCK RATES**

**OI and SNF Block**

Classroom Costs:					# Students per FTE
Classroom Count:	Position	FTE	Avg. Costs (19 ESY)	Cost Per Class (19 ESY)	
14	Teacher	1.000	X 156,250 *	156,250	8.50
February 2019 Enrollment: 119	Aide	1.607	X 71,807 *	115,394	5.29
	DISAPE/VO, W/Exp, IncSpec	0.131	X 155,776 *	20,329	65.13
	SLP	0.200	X 164,218 *	32,844	42.50
	OT/PT	0.070	X 155,673 *	10,857	121.48
	Nurse	0.160	X 177,798 *	28,448	53.13
Avg Class Size Based On Projections: 8.50	Psychologist	0.045	X 161,727 *	7,278	188.89
	Adj. for Classes Not Operating in ESY (See note)				
	<b>Subtotal - Classroom Cost</b>			<b>371,440</b>	

**Allocation of Shared Costs (Equally distributed to classrooms in all blocks):**

Instructional Administration (Director, Principal, SOC, Asst. Director*)	31,944
Other Support Staff (Job Training Specialist, Fin Analyst)	1,464
Substitute for Teachers and Aides	3,502
Custodial/Maintenance/Operations	865
Utilities	1,039
Repairs	42
Communications	718
Materials and supplies (Admin, Support Staff & Classrooms)	3,079
Contracted Services	1,029
Legal Costs	431
Other Direct Services (Technology, Food Production)	261
Mileage & Travel	964
Rentals (Copier Charges)	689
<b>Subtotal - Shared Cost</b>	<b>46,027</b>
<b>Total Direct Cost</b>	<b>417,467</b>

<b>Total Direct Cost</b>	417,467
Indirect Cost (object code 7000)	37,572
<b>Total - OI &amp; SNF Indirect Cost</b>	<b>455,039</b>

Note: ESY: Salaries + Benefits  
 (A) X .095 (19 days of ESY / 199 total instructional days  
 (B) X (# of classes not operating in ESY)  
 (C) / 14 (# of classes in OI & SNF) =

\* Student per FTE if total assignment were students in the OI & SNF block.

Estimated Cost Per Student (Based on February 2019 Block Count):				
Final cost will be determined by using based on October 2019 through April 2020 estimate				
Est. Per Class	Per Class Cost	Total	Enrollment	Est. Cost per Student
MOU & Offices	\$ 455,039	\$ 6,370,546	119	\$ 53,534
Est. Cost	\$ (39,412)	\$ (394,732)	119	\$ (4,637)
	<b>\$ 415,627</b>	<b>\$ 5,975,814</b>		<b>\$ 48,897</b>

SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING  
2019-20 ESTIMATE FOR BLOCK RATES

Deaf Block

Classroom Costs:		Position	FTE	Avg. Costs	Cost Per Class (19 ESY)	# Students per FTE
Classroom Count:	14	Teacher	1.000	X 156,250 =	156,250	8.29
February 2019 Enrollment:	116	Aide**	0.737	X 71,807 =	52,979	11.24
		Dis(APE, V, OM, WH, Exp, Inc, Spec)	0.131	X 155,776 =	20,329	63.49
		SLP	0.243	X 164,218 =	39,889	34.11
		OT/PT	0.050	X 155,673 =	7,784	16.11
		Nurse	0.058	X 177,798 =	10,312	149.66
		Psychologist	0.045	X 161,727 =	7,278	184.13
		Interpreter	1.286	X 97,790 =	125,729	6.44
		Educational Associate	0.2680	X 83,115 =	22,275	30.92
		Counselor	0.0714	X 187,484 =	13,392	116.00
		Audiologist	0.171	X 177,859 =	29,635	48.93
		Contract Services (Sign Language Contract)			1,429	
		Adj. for Classes Not Operating in ESY (See note)			(13,225)	
<b>Subtotal - Classroom Cost</b>						<b>474,006</b>
<b>Allocation of Shared Costs (usually distributed to classrooms in all blocks):</b>						
		Instructional Administration (Director, Principal, SOC, Asst. Director*)				31,944
		Other Support Staff (Job Training, Specialist, Fin. Analyst)				1,464
		Substitute for Teachers and Aides				3,502
		Custodial/Maintenance/Operations				865
		Utilities				1,039
		Repairs				42
		Communications				718
		Materials and supplies (Admin, Support Staff & Classrooms)				3,079
		Contracted Services				1,029
		Legal Costs				431
		Other Direct Services (Technology, Food Production)				261
		Mileage & Travel				964
		Rentals (Copier Charges)				689
		<b>Subtotal - Shared Cost</b>				<b>46,027</b>
<b>Total Direct Cost</b>						<b>520,033</b>

Total Direct Cost	\$ 520,033
Indirect Cost (object code 7000)	46,803
<b>Total - DHON with Indirect Cost</b>	<b>566,836</b>

Note: ESY: Salaries + Benefits

(A) X .095 (19 days of ESY / 199 total instructional days

(B) X (# of classes not operating in ESY)

(C) / 14 (# of classes in DHON) =

4 13,225

\* Student per FTE if total assignment were students in the Deaf block.

\*\*Aides reduced in Deaf block due to use of Educational Associates.

Estimated Cost Per Student (Based on February 2019 Block Count):		Per Class Cost	Total	Enrollment	Est. Cost per Student
Est. Per Class	\$ 566,836	X 14 =	\$ 7,935,704	116 =	\$ 68,411
MOU & Others	\$ (39,412)	X 14 =	\$ (551,774)	116 =	\$ (4,757)
<b>Est. Cost</b>	<b>\$ 527,424</b>		<b>\$ 7,383,930</b>		<b>\$ 63,655</b>

Special Education Rebenching

March 8, 2019

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SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING  
2019-20 ESTIMATE FOR BLOCK RATES

MF Block

Classroom Costs:		Position	FTE	Avg. Costs	Cost Per Class (19 ESY)	# Students per FTE
Classroom Count:	12	Teacher	1.000	X 156,250 =	156,250	7.08
February 2019 Enrollment:	85	Aide	1.507	X 71,807 =	108,213	4.70
		Dis(APE, V, OM, WH, Exp, Inc, Spec)	0.131	X 155,776 =	20,329	54.28
		SLP	0.100	X 164,218 =	16,422	70.83
		OT/PT	0.150	X 155,673 =	23,351	47.22
		Nurse	0.300	X 177,798 =	53,339	28.61
		Psychologist	0.045	X 161,727 =	7,278	157.41
		Adj. for Classes Not Operating in ESY (See note)				
<b>Subtotal - Classroom Cost</b>						<b>385,182</b>
<b>Allocation of Shared Costs (usually distributed to classrooms in all blocks):</b>						
		Instructional Administration (Director, Principal, SOC, Asst. Director*)				31,944
		Other Support Staff (Job Training, Specialist, Fin. Analyst)				1,464
		Substitute for Teachers and Aides				3,502
		Custodial/Maintenance/Operations				865
		Utilities				1,039
		Repairs				42
		Communications				718
		Materials and supplies (Admin, Support Staff & Classrooms)				3,079
		Contracted Services				1,029
		Legal Costs				431
		Other Direct Services (Technology, Food Production)				261
		Mileage & Travel				964
		Rentals (Copier Charges)				689
		<b>Subtotal - Shared Cost</b>				<b>46,027</b>
<b>Total Direct Cost</b>						<b>431,209</b>

Total Direct Cost	\$ 431,209
Indirect Cost (object code 7000)	36,809
<b>Total - MF with Indirect Cost</b>	<b>470,018</b>

Note: ESY: Salaries + Benefits

(A) X .095 (19 days of ESY / 199 total instructional days

(B) X (# of classes not operating in ESY)

(C) / 12 (# of classes in MF) =

0

\* Student per FTE if total assignment were students in the MF block.

<u><b>Estimated Cost Per Student (Based on February 2019 Block Count):</b></u>					
<i>* Final cost will be determined by actuals based on October 2019 through April 2020 average.</i>					
	Per Class Cost	Total	Enrollment		Est. Cost per Student
Est. Per Class	\$ 470,018	X 12 =	\$ 5,640,216	85 =	\$ 66,355
MOU & Others	\$ (35,412)	X 12 =	\$ (424,944)	85 =	\$ (5,564)
<b>Est. Cost</b>	<b>\$ 434,606</b>		<b>\$ 5,167,267</b>		<b>\$ 60,791</b>

Special Education Rebenching

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**SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING**  
**2019-20 ESTIMATE FOR BLOCK RATES**

**Resource**  
**(Stand Alone)**

<u>Classroom Costs:</u>			
Position	FTE	Avg. Costs	Cost Per Class (19 ESY)
Teacher	1.000	X 156,250 =	156,250
Aide	1.376	X 71,807 =	98,806
DIS	0.100	X 155,776 =	15,578
Psychologist at AED	0.088	X 161,727 =	14,151
Program Specialist at AED	0.088	X 175,567 =	15,362
<b>Subtotal - Classroom Cost</b>			<b>300,147</b>
<u>Allocation of Shared Costs (usually distributed to resource classes)</u>			
Substitutes			3,502
Other (Materials & Supplies)			500
<b>Subtotal - Shared Cost</b>			<b>4,002</b>
<b>Total Direct Cost</b>			<b>304,149</b>

<b>Total Direct Cost</b>	304,149
Indirect Cost (object code 7000)	22,373
<b>Total - Resource with Indirect Cost</b>	<b>331,522</b>

**SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING**  
**2019-20 ESTIMATE FOR BLOCK RATES**

**Intensive**  
**(Stand Alone)**

<u>Classroom Costs:</u>			
Position	FTE	Avg. Costs	Cost Per Class (19 ESY)
SOC Teacher	1.000	X 156,250 =	156,250
Aide	0.888	X 71,807 =	49,409
DIS	0.100	X 155,776 =	15,578
Psychologist at AED	0.088	X 161,727 =	14,151
Program Specialist at AED	0.088	X 175,567 =	15,362
<b>Subtotal - Classroom Cost</b>			<b>250,746</b>
<u>Allocation of Shared Costs (usually distributed to intensive classes)</u>			
Substitutes			3,502
Other (Materials & Supplies)			500
<b>Subtotal - Shared Cost</b>			<b>4,002</b>
<b>Total Direct Cost</b>			<b>254,748</b>

<b>Total Direct Cost</b>	254,748
Indirect Cost (object code 7000)	22,927
<b>Total - Intensive with Indirect Cost</b>	<b>277,675</b>

**SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHING  
2019-20 ESTIMATE FOR BLOCK RATES**

	<b>1:1 rate with 9% Indirect Rate</b>
<b>1:1 Aides Rate</b>	9,784
<b>1:1 SPHC Rate</b>	11,269

NOTE: Example for 1:1 Aide calculation, 5.5 hours daily for entire year = \$9,784 x 5.5 = \$53,812

SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCING  
2019-20 ESTIMATED TOTAL ANNUAL BUDGETS BY BLOCK

DRAFT

Total Programs	Basic	Autism	Emotional Disturbance (ED)	Orthopedic Impairment (OI) & Skilled Nursing Facility (SNF)	Deaf/HoH	Medically Fragile (MF)	Resource (Stand Alone)	Intensive (Stand Alone)
Annual Budget	Per Class	Per Block	Per Class	Per Block	Per Class	Per Block	Per Class	Per Block
170.5	73.5	40	9	14	14	12	3	3
1,365	634	345	66	119	116	85		

Est. Number of Classes

Projected Enrollment

Estimated Cost

Classroom Costs:

1000 Certificated Salaries	30,108,332	162,977	11,978,827	191,937	7,677,491	198,290	1,784,609	178,898	2,504,570	197,718	2,768,054	185,181	2,222,167	146,577	439,730	146,577	732,883
2000 Classified Salaries	13,553,491	74,353	5,464,946	85,133	3,403,320	60,290	542,610	76,174	1,066,436	127,555	1,785,770	80,389	964,668	58,862	176,586	29,431	147,155
3000 Employee Benefits	19,687,369	107,841	7,926,314	123,573	4,942,920	115,376	1,038,386	116,251	1,627,514	147,228	2,061,192	119,448	1,433,376	94,691	284,073	74,719	373,595
5000 Services, Other Operating Exp	36,022	71	5,201	113	4,509	166	1,493	117	1,640	1,505	21,068	164	1,973	17	52	17	87
Subtotal Classroom Costs	63,385,214	345,242	25,375,287	400,756	16,030,240	374,122	3,367,098	371,440	5,200,160	474,006	6,636,084	385,182	4,622,184	300,147	900,441	250,744	1,253,720

Allocation of Shared Costs (equally distributed to classrooms in all blocks):

1000 Certificated Salaries	12,134	891,849	12,134	12,134	109,206	12,134	169,876	12,134	169,876	12,134	169,876	12,134	145,608	1,551	4,653	1,551	7,755
2000 Classified Salaries	13,776	1,012,536	13,776	13,776	123,984	13,776	192,864	13,776	192,864	13,776	192,864	13,776	165,312	1,426	4,278	1,426	7,130
3000 Employee Benefits	10,603	779,321	10,603	10,603	95,427	10,603	148,442	10,603	148,442	10,603	148,442	10,603	127,248	525	1,575	525	2,625
4000 Books and Supplies	2,697	198,230	2,697	2,697	24,273	2,697	37,758	2,697	37,758	2,697	37,758	2,697	32,352	500	1,500	500	2,500
5000 Services, Other Operating Exp	6,817	501,050	6,817	6,817	61,353	6,817	95,438	6,817	95,438	6,817	95,438	6,817	81,804	*	*	*	*
6000 Capital Outlay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal Shared Costs	46,027	3,382,985	46,027	46,027	414,243	46,027	644,378	46,027	644,378	46,027	644,378	46,027	552,324	4,002	12,006	4,002	20,010

7000 Other Outgo / Transfers Out

35,214	2,588,229	40,210	1,608,400	37,813	340,317	37,572	526,008	46,803	655,242	38,809	465,708	27,373	82,119	22,927	114,635
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Total Cost

426,483	31,346,501	486,993	19,479,720	457,962	4,121,658	455,039	6,370,546	566,836	7,935,704	470,018	5,640,216	331,522	994,566	277,673	1,388,365
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Estimated Cost Per Student

49,442	56,463	62,449	53,534	68,411	66,355
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MOU1 & Other Offsets

(4,569)	(4,570)	(5,374)	(4,637)	(4,757)	(5,564)
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Estimated Cost Per Student

44,873	51,893	57,075	48,897	63,655	60,791
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Note:

1. Greyed areas are specific to block, unshaded areas are equal per class.
2. Estimated Cost Per Student is based on February 2019 Block Count. Final cost will be determined based on monthly average (October thru April) as determined by SELPA Fiscal Analyst.

**SANTA CLARA COUNTY OFFICE OF EDUCATION - SPECIAL EDUCATION REBENCHMARKING  
COMPARISON OF 2018-19 TO 2019-20 ESTIMATED BLOCK RATES**

(A)	2018-19 Rebenchmarking Rates			2019-20 ESTIMATED BLOCK RATES WITH 9% INDIRECT CHARGE					(J)	Notes For Changes Specific To Each Program Block Rate
	(B) 2018-19 Est. # of Classes	(C) Block Rates**	(D) Total Program Cost	(E) 2019-20 Est. # of Classes	(F) Est. Block Rates**	(G) Est. Total Program Cost	(H) = (F) - (C) Block Rate \$ Variance vs 2018-19 & 2019-20*	(I) = (H) / (C) Block Rate % Variance vs 2018-19 & 2019-20*		
Basic	77.50	421,333	32,653,308	73.50	426,483	31,346,501	5,150	1.22%	(1,306,807)	4 less classrooms
Autism	42.00	483,161	20,292,762	40.00	486,993	19,479,720	3,832	0.79%	(813,042)	2 less classrooms
Emotional Disturbance (ED)	10.00	466,867	4,668,670	9.00	457,962	4,121,658	(8,905)	-1.91%	(547,012)	1 less classroom/decrease due to the ESY class adjustment
Orthopedic Impairment (OI) and Skilled Nursing Facility (SNF)	14.00	445,317	6,234,438	14.00	455,039	6,370,546	9,722	2.18%	136,108	Adjustment in ESY in 18-19 and no adjustment in 19-20
Deaf/HoH	14.00	560,078	7,841,092	14.00	566,836	7,935,704	6,758	1.21%	94,612	Adjustment in ESY in 19-20 is less than the adjustment in 18-19
Medically Fragile (MF)	12.00	462,274	5,547,288	12.00	470,018	5,640,216	7,744	1.68%	92,928	
Resource	3.00	328,739	986,217	3.00	331,522	994,566	2,783	0.85%	8,349	
Intensive	5.00	275,931	1,379,655	5.00	277,673	1,388,365	1,742	0.63%	8,710	
<b>Total</b>	<b>177.50</b>		<b>79,603,430</b>	<b>170.50</b>		<b>77,277,276</b>			<b>(2,326,154)</b>	

**\* SUMMARY**

1. STRS at 17.10% and PERS at 20.70%.
2. OPEB at \$1,056 per FTE (decrease of \$251 per FTE)
3. Step and column for salaries
4. Indirect Charge calculated at 9% Rate (CDE Approved ICR for FY 19-20 is 10.5%, SCCOE adjusted ICR is 9.74%)

\*\* Estimated Block Rates are before MOU1 & other offsets are applied.

## 2019-20 ESTIMATED SCCOE SPECIAL ED PROGRAM FUNDING

### COE PROGRAM COSTS:

4/2/2019

PROGRAM BLOCK	**Proposed Block Rates**								RATE PER CLASS		TOTAL COST
	OCT	NOV	DEC	JAN	FEB	MAR	APR	AVERAGE			
					Est						
BASIC					73.50			73.50	X	\$ 426,483	= \$ 31,346,501
AUTISM					40.00			40.00	X	\$ 486,993	= \$ 19,479,720
SNF					2.50			2.50	X	\$ 455,039	= \$ 1,137,598
E.D.					9.00			9.00	X	\$ 457,962	= \$ 4,121,658
LOW INCID.(OI)					11.50			11.50	X	\$ 455,039	= \$ 5,232,949
LOW INCID.(DEAF)					14.00			14.00	X	\$ 566,836	= \$ 7,935,704
MED.FRAGILE					12.00			12.00	X	\$ 470,018	= \$ 5,640,216
<b>SUBTOTAL (1)</b>	-	-	-	-	162.50	-	-	162.50			<b>\$ 74,894,345</b>
1:1 SPHC AIDES								249.59	X	\$ 11,269	= \$ 2,812,640
1:1 AIDES (HRS/DAY)								1,278.55	X	\$ 9,784	= \$ 12,509,289
<b>SUBTOTAL (2)</b>											<b>\$ 90,216,273</b>
<b>ADD IN LCI COST SHARE: DISTRICT-SERVED, TRANSPORTATION, CCS</b>											
FACILITIES COSTS											\$ 1,672,305
AAC											\$ 331,899
MAXIM											\$ 1,013,984
DIS APE											\$ 206,959
DIS VISION / O & M											\$ 444,543
HOME TEACHING											\$ 610,077
MISCELLANEOUS											\$ -
DHOH											\$ 273,009
											<b>\$ 94,769,049</b>
ASD RESOURCE	3	3.00	3.00	3.00	3.00	3.00	3.00	3.00	X	\$ 331,522	= \$ 994,566
ASD INTENSIVE	5	5.00	5.00	5.00	5.00	5.00	5.00	5.00	X	\$ 277,673	= \$ 1,388,365
<b>SUBTOTAL (3)</b>											<b>\$ 2,382,931</b>
<b>GRAND TOTAL</b>											<b>\$ 97,151,980</b>

#### Notes:

\*Does not include Infant Program or NPS/LCI (which are funded separately via J-50, State Aid to COE)

\*Very Important Change at 2013/2014 P2 Certification, July 2014: County Office Funds Transfer - RL Transfer REMOVED from Offsetting Revenues resulting to increased Sp Ed Revenue transferred from districts to COE

### REVENUE SOURCES FOR PAYING THE ABOVE COE PROGRAM COSTS:

OTHER OFFSETTING REVENUE FOR BLOCK CLASSES			\$	6,200,648
DISTRICT PAYMENTS TO COE (BLOCKS)			\$	88,096,961
LESS PY CARRYOVER CREDITS - NW SELPA DISTRICTS (SELPA 1,2,7)			\$	-
PY ADJ (PAYMENT OF PY DEFICIT ON SELPA III JUVENILE COURT GRANT)-NW SELPA			\$	-
INVOICED TUITION COSTS (OUT-OF-COUNTY DISTRICTS, INVOICED BY SPED PROGRAM)			\$	67,729
FROM OUT OF HOME BED COUNT- FOR NW SELPA COST SHARE			\$	627,895
<b>SUBTOTAL (1)</b>			\$	94,993,233
ASD SPECIAL ED SERVICES				
LCFF FOR SDC ADA IN ALT ED (SPECIAL ED NJCS BASE+JCS BASE)				
TRANSFER FROM SELPA III OF JUV. COURT GRANT (LESS DEFICIT FACTOR)				
ESTIMATED "OTHER SOURCE" REVENUES FOR SDC IN ASD CLASSES				
FROM DISTRICTS FOR SDC IN ASD, BY USAGE (ADA)				
FROM DISTRICTS FOR RSP IN ASD, BY USAGE (PUPIL COUNT)				
INVOICED TO OUT-OF-COUNTY DISTRICTS BY SCCOE SPECIAL ED - RSP/ASD				
<b>SUBTOTAL (2)</b>			\$	2,382,931
<b>GRAND TOTAL</b>			\$	97,376,164

COE LCFF Transition Calculation	
19-20	SDC ADA
\$ 12,334 X	21.59
	-

Rev sources - COE Costs	\$	224,183
Net Facilities Fees Collected/(Deficit)	\$	224,183
PY ADJ (PAYMENT OF PY DEFICIT ON SELPA III JUVENILE COURT GRANT)-NW SELPA	-	
PY Carryover Credits to districts - NW SELPA	-	\$ 224,183
Variance		(0)

Note:

\*This estimate assumes that LCFF for SCCOE Sp Ed Pupils continues to go to Districts of Residence, and does not offset costs to districts for SCCOE

#### Note:

\*This estimate assumes that LCFF for SCCOE Sp Ed Pupils continues to go to Districts of Residence, and does not offset costs to districts for SCCOE

# SCCOE SPECIAL ED "OTHER OFFSETTING REVENUES"

4/3/2019

	2019-20 EST	2018-19 P-1	2017-18 P2	2016-17 P2	2015-16 P2	2014-15 P2	2013-14 P2	2011-12 P2
1) "Goldfinger FRZ" 24.27 units (18.45 SDC and 5.82 DIS)	\$ 2,040,125	\$ 2,040,125	\$ 2,040,125	\$ 2,040,125	\$ 2,040,125	\$ 2,040,125	\$ 2,040,125	\$ 2,040,125
Revenue transfer from SELPA III Base Funding								
18.45 SDC 1 Aide x \$89,516 = \$1,651,570								
5.82 DIS x \$66,762 = \$388,555								
Calculated at COE posted Transfer Rates								
less basic entitlement deficit factor								
0.0000000%	\$ -	\$ -	\$ -	\$ -	\$ (55,281)	\$ (46,358)	\$ (56,865)	
Less \$52 from MOU 2 Imbalance	(\$2,00)							
2) COE Base Year (97/98) Extended Year Funding	\$ 3,039,659	\$ 3,039,659	\$ 3,039,659	\$ 3,039,659	\$ 3,039,659	\$ 3,039,659	\$ 3,039,659	\$ 3,039,659
Revenue transfer from SELPA III Base Funding								
less basic entitlement deficit factor								
0.0000000000	\$ -	\$ -	\$ -	\$ -	\$ (82,366)	\$ (69,070)	\$ (84,725)	
3) NPS/NPA Column A, B Base Year Reimbursements	\$ 1,106,040	\$ 1,106,040	\$ 1,106,040	\$ 1,106,040	\$ 1,106,040	\$ 1,106,040	\$ 1,106,040	\$ 1,106,040
Revenue transfer from SELPA III Base Funding- less SELPA II,III OT	\$ -	\$ -	\$ -	\$ -	\$ (29,970)	\$ (25,132)		
less OT	\$ (148,162)	\$ (148,162)	\$ (148,162)	\$ (148,162)	\$ (148,162)	\$ (148,162)	\$ (148,162)	\$ (148,162)
less basic entitlement deficit factor	\$ -	\$ -	\$ -	\$ -	\$ 4,015	\$ 3,367		
0.0000000000								
total deficit	0						\$ (26,699)	
Subtotal MOU #1	\$ 6,037,662	\$ 6,037,662	\$ 6,037,662	\$ 6,037,662	\$ 5,874,059	\$ 5,900,469		
4) Federal Local Assistance (COE)								
Removed from "Other Revenue Sources" and counted for each district as partial payment of SCCOE services								
5) Federal Preschool Local Entitlement (COE Re 3320)*	\$ -	\$ -	\$ 364,440	\$ 336,819	\$ 203,143	\$ 208,571	\$ 222,777	\$ 249,909
*Update! Effective 2018-19, Re 3320 will be consolidated into Re 3310							\$ 7,709	
6) Federal Preschool Grant (COE Re 3315)	\$ 102,958	\$ 108,633	\$ 122,744	\$ 111,683	\$ 96,101	\$ 98,384	\$ 115,582	\$ 126,090
								\$ 127,577
It will be updated with each year's current grant amount when known								
7) Estimated Lottery Funds	\$ 250,817	\$ 260,359	\$ 285,471	\$ 256,089	\$ 259,681	\$ 209,910	\$ 247,143	\$ 228,167
Updated 3/26/19								
8) Revenue Received from Leases	\$ -	\$ -	\$ -	\$ -	\$ 77,584	\$ -		
9) Payment of PRIOR YEAR DEFICIT	\$ -	\$ -	\$ -	\$ 163,603	\$ 137,193			\$ 7,232,506
10) Revenue Limit Transfer from Districts to COE	\$ -	\$ -	\$ -	\$ -				
Discontinued beginning 2013/2014.								
Districts keep LCFF funds, but contribute more Sp Ed \$								
Total COE Revenue from "Other Sources"	\$ 6,391,437	\$ 6,406,654	\$ 6,810,317	\$ 6,905,856	\$ 6,647,761	\$ 6,417,334	\$ 6,462,584	\$ 14,001,911
Divided by total number of Block Classes	167.5	168	179	178	177	180	187	168
Equals deduct per class for COE Sp.Ed. Revenue received from "Other Sources"	\$ 38,158	\$ 38,249	\$ 38,046	\$ 38,797	\$ 37,558	\$ 35,652	\$ 34,559	\$ 83,593
Updated 1/24/18:					\$			
Alt Ed rate 19-20								
Sp Ed in Alt Ed, per class average, LCFF offset	12,333.86	21.59	266,288	307,349	307,349	53,258	divided by # of classes	
FOR INFO ONLY:								
DEFICIT ON MOU#1					(163,603)	(137,193)	(141,590)	
DEFICIT ON SELPA III JUVENILE COURT					(3,159)			
DEFICIT ON OT TO SELPA II (SUNNYVALE)				(1,357)	(1,357)			
				(1,357)	(168,119)			







DISTRICT LCI COST SHARE										FACILITIES/LEASE AGREEMENT											
DISTRICT	DEDUCT FOR COE LCI PUPILS	DEDUCT FOR LCI PUPILS SERVED IN DISTRICT	DEDUCT LCI WHEELCHAIR TRANSPORT	DEDUCT LCI MTU COST SHARE	ADD LCI CHARGE BY ADA	NET LCI CHARGE	2018-19 Est P-1 ADA	% OF TOTAL ADA	RESPONSIBLE FOR LCI PUPILS BASED ON % OF TOTAL ADA	AVE # OF PUPILS IN BLOCK	AVE # OF PUPILS IN BLOCK (MINUS) LCI PUPILS IN BLOCK (PLUS) % SHARE OF LCI IN BLOCK	NUMBER OF HANDSPACE CLASSROOMS PROVIDED BY DISTRICT	NUMBER OF NEW CONSTRUCTION	NUMBER OF "LAND-ONLY" PROVIDED BY DISTRICT FOR COE PORTABLES	TOTAL NUMBER OF CLASSROOMS FOR CREDIT	SPACES FOR CREDIT	NUMBER OF SPACES	CHARGE TO DISTRICT FOR PROVIDING CUSTODIAL	TOTAL FACILITIES/COMPENSATION/ (FEE)		
										100%	45%	65%									
AVE # OF LCI PUPILS IN BLOCK *										36.00											
LOS ALTOS	-	-	-	-	54,857	54,857	4,152.52	2.92%	1.05	1,052.6	0.0	0.0	0.0	0.0	0.0	0.0000	-	(1)	-	(4,129.39)	
PALO ALTO	-	-	-	-	153,443	153,443	11,615.24	8.18%	2.94	2,943.3	0.0	0.0	0.0	0.0	0.0	0.0000	-	(3)	-	(11,551.31)	
MV-LOS ALTOS	(57,246)	(26,228)	-	-	55,927	(27,546)	4,283.52	2.98%	1.07	2,983.3	0.0	0.0	0.0	0.0	0.0	0.0000	-	(4)	-	(15,979.21)	
MV/WHISMAN	-	-	-	-	65,525	65,525	4,960.08	3.49%	1.26	2,257.3	0.0	0.0	0.0	0.0	0.0	0.0000	-	(2)	-	(8,856.56)	
SELPA I	(57,246)	(26,228)	-	-	329,753	137,688	24,960.36	17.58%	6.33	10,327.3	0.0	0.0	0.0	0.0	0.0	0.0	-	(10)	0	(40,515.15)	
FREMONT	(98,831)	-	-	-	136,832	38,001	10,732.06	7.56%	2.72	22,720.4	0.0	0.0	0.0	0.0	0.0	0.0000	-	(23)	-	(89,134.41)	
SUNNYVALE	-	-	-	-	82,516	28,221	6,471.97	4.56%	1.64	10,640.5	0.0	0.0	0.0	0.0	0.0	0.0000	-	(71)	-	(41,744.44)	
CUPERTINO	-	-	-	-	216,526	216,526	16,982.69	11.96%	4.30	24,304.8	0.0	0.0	0.0	0.0	0.0	0.0000	-	(24)	-	(95,350.30)	
SELPA II	(98,831)	-	-	-	435,874	282,748	34,186.72	24.07%	8.67	57,665.8	0.0	0.0	0.0	0.0	0.0	0.0	-	(59)	0	(236,227.27)	
SCCOE - DISCOVERY 1	(899,851)	-	-	-	43,980	(855,871)	544.30	0.38%	0.14	1,138.0	0.0	0.0	0.0	0.0	0.0	0.0000	-	(1)	-	(4,464.46)	
CAMPBRIAN	-	-	-	-	91,810	(408,577)	7,082.84	4.99%	1.80	13,861.9	0.0	0.0	0.0	0.0	0.0	0.0000	-	(10)	-	(86.86)	
CAMPBELL ELEM	(500,187)	-	-	-	102,773	(392,930)	7,945.90	5.59%	2.01	35,795.4	0.0	0.0	0.0	0.0	0.0	0.0000	-	20	-	(76,753.76)	
CAMPBELL HIGH	(486,702)	(19,002)	-	-	6,203	6,203	479.58	0.34%	0.12	0,121.6	0.0	0.0	0.0	0.0	0.0	0.0000	-	(15)	-	(58,370.70)	
LOMA PRIETA	-	-	-	-	44,270	(45,548)	3,422.72	2.41%	0.87	6,867.6	0.0	0.0	0.0	0.0	0.0	0.0000	-	(7)	-	(477.10)	
LG SARATOGA	(53,812)	(36,006)	-	-	38,097	38,097	2,945.44	2.07%	0.75	7,746.6	0.0	0.0	0.0	0.0	0.0	0.0000	-	(18)	-	(26,942.32)	
LOS GATOS ELEM	-	-	-	-	6,456	6,456	4,991.16	0.35%	0.13	2,126.5	0.0	0.0	0.0	0.0	0.0	0.0000	-	(2)	-	(8,343.31)	
LUTH BURBANK	-	-	-	-	59,243	59,243	4,580.35	3.23%	1.16	17,161.0	0.0	0.0	0.0	0.0	0.0	0.0000	-	(7)	-	(30,391.10)	
MORELAND	-	-	-	-	22,353	22,353	1,728.23	1.22%	0.44	2,438.1	0.0	0.0	0.0	0.0	0.0	0.0000	-	(13)	-	(13,029.59)	
SARATOGA	-	-	-	-	74,705	74,705	5,775.80	4.07%	1.46	23,464.1	0.0	0.0	0.0	0.0	0.0	0.0000	-	72	-	(52,946.32)	
LAKEVIEW	-	-	-	-	897	897	69.34	0.05%	0.02	1,017.6	0.0	0.0	0.0	0.0	0.0	0.0000	-	(1)	-	(282,393.50)	
SELPA III	(1,940,351)	(45,008)	-	-	490,586	(1,494,973)	38,473.99	27%	9,752.5	183,752.5	23.0	0.0	0.0	0.0	0.0	36.35	231.6	68	0	(19,992.72)	
SCCOE - DISCOVERY 2	(52,039)	(17,216)	-	-	393,436	324,171	29,594.78	20.84%	7.50	200,501.8	43.0	8.00	8.00	0.0	0.0	45.60	315,570	115	(262,767.17)	0	
SELPA IV	(52,039)	(17,216)	-	-	393,436	324,171	29,594.78	20.84%	7.50	200,501.8	43.0	8.00	8.00	0.0	0.0	45.60	315.6	115	(262,767.17)	188,584.44	
ALUM ROCK	-	-	-	-	-	-	9,750.64	9.80%	3.43	102,431.6	6.0	4.0	4.0	1.0	0.0	8.45	58,483.1	(44)	-	(172,413.33)	
BERRYESSA	-	-	-	-	-	-	6,929.53	6.97%	2.44	57,436.8	5.0	0.0	0.0	3.0	0.0	6.95	48,121.3	(9)	-	(36,553.33)	
EAST SIDE	-	-	-	-	-	-	22,318.93	22.44%	7.85	250,854.8	9.0	5.00	5.00	2.0	0.0	12.55	86,864.2	(164)	-	(643,348.48)	
EVERGREEN	-	-	-	-	-	-	11,199.84	11.20%	3.92	130,920.5	14.0	0.00	0.00	0.0	0.0	14.00	96,880.0	(34)	-	(133,544.44)	
FR MCKINLEY	-	-	-	-	-	-	7,367.07	7.41%	2.59	44,592.7	1.0	8.00	8.00	0.0	0.0	4.60	31,832.0	(13)	-	(50,061.11)	
MILPITAS	-	-	-	-	-	-	10,089.46	10.15%	3.55	30,550.8	3.0	0.00	0.00	2.0	0.0	4.30	29,774.2	(11)	-	(3,047.71)	
MT PLEASANT	-	-	-	-	-	-	2,258.97	2.27%	0.80	24,795.0	3.0	0.00	0.00	4.0	0.0	5.61	38,788.4	(14)	-	(54,897.59)	
OAK GROVE	-	-	-	-	-	-	9,999.37	10.05%	3.52	96,519.1	9.0	0.00	0.00	2.0	0.0	10.30	71,294.2	(25)	-	(98,959.59)	
ORCHARD	-	-	-	-	-	-	851.58	0.86%	0.30	12,299.7	5.0	0.00	0.00	0.0	0.0	5.00	34,600.0	22	-	(87,486.56)	
GLORY	-	-	-	-	-	-	10,683.13	10.74%	3.76	45,759.8	0.0	4.00	4.00	0.0	0.0	1.80	12,456.0	(33)	-	(130,653.33)	
MORGAN HILL	-	-	-	-	-	-	8,061.30	8.11%	2.84	62,837.1	0.0	0.00	0.00	2.0	0.0	1.30	9,014.2	(54)	-	(211,151.11)	
SELPA	-	-	-	-	-	-	99,449.82	100.00%	35.00	859,000.0	55.0	21.00	21.00	16.0	0.0	74.87	518.1	(341)	0	(1,337,347.37)	
SANTA CLARA	(57,246)	(9,002)	-	-	188,718	122,470	14,804.23	10.42%	3.75	52,752.6	10.0	0.0	0.0	0.0	0.0	10.00	69,200.0	16	(37,737.17)	26,788.88	
SELPA VII	(57,246)	(9,002)	-	-	188,718	122,470	14,804.23	10.42%	3.75	52,752.6	10.0	0.0	0.0	0.0	0.0	10.00	69.2	16	(37,737.17)	26,788.88	
OUT OF COUNTY (SOQUEL ELEM/ FREMONT UNIFIED)	-	-	-	-	-	-	-	-	-	1,000.0	-	-	-	-	-	-	-	-	-	-	
TOTAL OUT OF COUNTY	-	-	-	-	-	-	-	-	-	1,000.0	-	-	-	-	-	-	-	-	-	-	
GRAND TOTAL	(2,205,913)	(87,463)	-	-	1,838,166	(627,895)	241,470.90	200.00%	71.00	1,364.00	130.00	29.00	29.00	36.5	166.82	1,154.42	(420,17)	(1,00)	(3,923.08)	(1,126,645.65)	
Excess Funds from Bed Count to be used in offset COE Cor																				NW Facilities Comp	
																				769,844	
																				(902,461)	
																				(558,343)	
																				(1,693,669)	
																				1,896,489	
																				236,819	
																				1,139,281	
																				236,819	
																				1,126,645	

4/1/2019	DISTRICT	SUMMARY OF SCCOE SPECIAL ED COSTS							TOTAL SCCOE COSTS "BEFORE" ADJUSTMENT (EXCLUDING FACILITIES COMPENSATION & SPED IN ALT ED)	TOTAL SCCOE COSTS "AFTER" ADJUSTMENT (EXCLUDING FACILITIES COMPENSATION & SPED IN ALT ED)	RATE PER PUPIL
		FACILITIES COMPENSATION (CREDITED SEPARATELY AT YEAREND)	BLOCK ENROLLMENT COSTS	1:1 AIDES COSTS	DIS SERVICES	NET LQ COSTS SHARED BY ADA	FACILITIES FEES	PY RETURN OF EXCESS BLOCK REVENUE AS OFFSET TO CY COSTS - NW			
	LOS ALTOS	-	-	-	66,142	54,857	4,129	125,129	125,129	52,039	45,019
	PALO ALTO	-	-	-	-	-	11,551	56,403	56,403	52,039	52,039
	MV-LOS ALTOS	-	220,479	102,986	63,674	(27,546)	15,979	375,572	375,572	57,246	57,246
	MV/WHISMAN	-	63,806	-	8,556	65,525	-	175,786	175,786	63,806	63,806
	SELPA I	-	284,285	102,986	167,415	137,688	40,515	732,890	732,890	45,313	45,313
	FREMONT	-	1,040,625	407,830	39,729	38,001	89,134	1,615,369	1,615,369	60,568	60,568
	SUNNYVALE	-	476,725	127,637	14,194	28,221	41,744	688,521	688,521	11,769	11,769
	CUPERTINO	-	971,653	317,786	90,506	216,528	95,350	1,701,821	1,701,821	9,784	9,784
	SELPA II	-	2,489,054	873,253	134,429	282,748	226,227	4,005,711	4,005,711	-	-
	SCCOE - DISCOVERY 1	-	52,039	-	-	-	4,464	56,503	56,503	-	-
	CAMPBRIAN	-	1,299,190	458,605	157,641	(855,871)	86	1,059,652	1,059,652	-	-
	CAMPBELL ELEM	76,753	2,179,611	143,682	181,050	(408,577)	-	2,095,766	2,095,766	-	-
	CAMPBELL HIGH	-	3,834,537	1,364,455	285,512	(392,930)	58,370	5,149,943	5,149,943	-	-
	LOMA PRIETA	-	-	-	7,560	6,203	477	14,240	14,240	-	-
	LG-SANATOGA	-	307,860	200,572	60,608	(45,546)	26,942	550,434	550,434	-	-
	LOS GATOS ELEM	-	369,853	82,449	16,894	38,097	30,391	537,684	537,684	-	-
	LUTH BURBANK	-	104,078	34,244	-	6,456	8,343	153,120	153,120	-	-
	MORELAND	-	827,982	196,347	200,635	59,243	13,029	1,297,235	1,297,235	-	-
	SARATOGA	52,946	90,038	18,499	18,499	22,353	-	130,889	130,889	-	-
	UNION	282,390	1,093,815	290,963	241,800	74,705	-	1,701,283	1,701,283	-	-
	LAKESIDE	-	49,939	-	13,269	897	3,992	68,096	68,096	-	-
	SELPA III	412,090	10,206,941	2,771,316	1,183,467	(1,494,979)	146,093	12,814,945	12,814,945	-	-
	SCCOE - DISCOVERY 2	-	-	-	-	-	-	-	-	-	-
	SAN JOSE UNIF	188,584	9,788,408	1,817,539	281,129	324,171	-	12,211,247	12,211,247	-	-
	SELPA IV	188,584	9,788,408	1,817,539	281,129	324,171	-	12,211,247	12,211,247	-	-
	ALUM ROCK	-	5,068,362	555,035	4,089	-	172,413	5,799,899	5,799,899	-	-
	BERRYESSA	-	2,896,555	450,094	72,042	-	36,553	3,457,214	3,457,214	-	-
	EAST SIDE	-	13,309,228	3,976,966	322,008	-	643,348	18,251,590	18,251,590	-	-
	EVERGREEN	-	6,552,914	531,675	50,405	-	133,544	7,274,538	7,274,538	-	-
	FR-MCKINLEY	-	2,252,195	392,213	41,719	-	50,061	2,736,188	2,736,188	-	-
	MILPITAS	-	1,387,473	348,697	131,065	-	3,047	1,870,282	1,870,282	-	-
	MT PLEASANT	54,897	1,274,605	3,558	63,751	-	-	1,341,913	1,341,913	-	-
	OAK GROVE	-	4,677,395	445,973	227,092	-	98,959	5,449,419	5,449,419	-	-
	ORCHARD	87,486	610,523	78,272	48,693	-	-	737,488	737,488	-	-
	GILROY	-	2,207,754	734,070	84,425	-	130,653	3,156,902	3,156,902	-	-
	MORGAN HILL	-	3,096,206	1,098,139	27,756	-	211,151	4,433,252	4,433,252	-	-
	SE SELPA	142,383	43,335,212	8,620,662	1,073,044	-	1,479,730	54,508,647	54,508,647	-	-
	SANTA CLARA	26,788	2,523,991	1,136,173	40,986	122,470	-	3,823,621	3,823,621	-	-
	SELPA VII	26,788	2,523,991	1,136,173	40,986	122,470	-	3,823,621	3,823,621	-	-
	OUT OF COUNTY (SCQUEL ELEM/ FREMONT UNIFIED)	-	63,806	-	-	-	3,923	67,729	67,729	-	-
	TOTAL OUT OF COUNTY	-	63,806	-	-	-	3,923	67,729	67,729	-	-
	GRAND TOTAL	769,944	68,693,697	15,321,929	2,880,471	(627,895)	1,896,489	88,164,690	88,164,690	-	-

TYPE OF CLASS	RATE PER PUPIL
BASIC	45,019
AUTISM	52,039
EMOTIONAL DISTURBANCE (ED)	57,246
LOW INCIDENCE (OI)	49,939
LOW INCIDENCE (DHOH)	63,806
SAF	45,313
MED FRAGILE	60,568
1:1 SPHC (HEALTH AIDES)	11,769
1:1 AIDES	9,784

\*Current year February enrollment is used for the purposes of budget development.

4/3/2019

[illegible]

# BLOCK ENROLLMENT

4/3/2019

DISTRICT NAME	LOW INCIDENCE (OI)										OI		FACILITIES		LOW INCIDENCE (DHOH)										DHOH		FACILITIES	
	OCT	NOV	DEC	JAN	FEB	MAR	APR	Est	Est	Est	AVERAGE	Est	DEC&APR	AVE	OCT	NOV	DEC	JAN	FEB	MAR	APR	Est	Est	Est	AVERAGE	Est	DEC&APR	AVE
	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act	Act
Los Altos																												
Palo Alto																												
MV-Los Altos																												
MV/Whisman																												
<b>SELPA I</b>																												
Fremont																												
Sunnyvale																												
Cupertino																												
<b>SELPA II</b>																												
SCCOE - Discovery Charter 1																												
Cambrian																												
Campbell Elem																												
Campbell High																												
Loma Prieta																												
LG-Saratoga																												
Los Gatos Elem																												
Luth Burbank																												
Moreland																												
Saratoga																												
Union																												
Lakeside																												
<b>SELPA III</b>																												
San Jose Unif																												
<b>SELPA IV</b>																												
Alum Rock																												
Berryessa																												
East Side																												
Evergreen																												
Fr-McKinley																												
Milpitas																												
Mt Pleasant																												
Oak Grove																												
Orchard																												
Gilroy																												
Morgan Hill																												
<b>SE SELPA</b>																												
Santa Clara																												
<b>SELPA VII</b>																												
Out of County, SCCOE SPED																												
need to bill separately																												
<b>TOTAL Out-of-County/COE</b>																												
<b>GRAND TOTAL</b>																												

## 4/3/2019

[illegible]



# Block Calculation Formula for district share of Sp. Ed. Services in Alternative Schools

SDC in ASD (2018-19)										RSP in ASD (2018-19)										1,809,229 {c}	
2 at Osborne, 1 at Blue Ridge										RSP in ASD monthly MIS pupil count											
Stonegate Park, Snell Community, Osborne, Blue Ridge, Edge, Sunol, Odyssey																					
ADA										Note: second date following / is for SE SELPA, if different from NW.											
P1										5.00											
2018-19										186,258											
in block										931,288											
%																					
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## 1:1 Aide Calculation

### Scenario 5a

Block	Hrs/Day												Total Hours	Ave Hours/Year	Total 1:1 Aide
Programs	July 2018	August 2018	September 2018	October 2018	November 2018	December 2018	January 2019	February 2019	March 2019	April 2019	May 2019	June 2019			Cost 1:1 Aide
	Act		Act	Act	Act	Act	Act	Act	Est	Est	Est	Est	# of Months	Rate/Hr/Yr	
													11.00	\$ 9,784.00	
Los Altos						-	-	-	-	-	-	-			
Palo Alto						-	-	-	-	-	-	-			
MV-Los Altos	5.50		5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	60.50	5.50	53,812.00
MV/Whisman						-	-	-	-	-	-	-			
Total - SELPA I	5.50	-	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	60.50	5.50	53,812.00
Fremont	44.50		44.50	50.00	39.00	33.50	33.50	27.50	27.50	27.50	27.50	27.50	382.50	34.77	340,216.36
Sunnyvale	11.50		16.50	16.50	16.50	16.50	11.00	11.00	11.00	11.00	11.00	11.00	143.50	13.05	127,636.73
Cupertino	19.25		23.00	23.00	17.50	23.00	23.00	35.00	35.00	35.00	35.00	35.00	303.75	27.61	270,171.82
Total - SELPA II	75.25	-	84.00	89.50	73.00	73.00	67.50	73.50	73.50	73.50	73.50	73.50	829.75	75.43	738,024.91
Cambrian	13.50		19.00	11.00	13.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	133.50	12.14	118,742.18
Campbell Elem	-		-	-	-	5.50	22.00	5.50	5.50	5.50	5.50	5.50	55.00	5.00	48,920.00
Campbell High	70.75		77.00	84.00	106.00	114.50	114.50	116.00	116.00	116.00	116.00	116.00	1,146.75	104.25	1,019,982.00
Loma Prieta						-	-	-	-	-	-	-			
LG-Saratoga	16.50		16.50	16.50	22.00	22.00	22.00	22.00	22.00	22.00	22.00	22.00	225.50	20.50	200,572.00
Los Gatos Elem			5.50	12.00	6.50	6.50	-	-	-	-	-	-	30.50	2.77	27,128.36
*Luth Burbank						5.50	5.50	5.50	5.50	5.50	5.50	5.50	38.50	3.50	34,244.00
Moreland	22.75		16.50	16.50	16.50	22.00	16.50	22.00	22.00	22.00	22.00	22.00	220.75	20.07	196,347.09
Saratoga						-	-	-	-	-	-	-			
Union	30.75		23.00	23.00	23.00	23.00	26.00	26.00	26.00	26.00	26.00	26.00	278.75	25.34	247,935.45
Lakeside						-	-	-	-	-	-	-			
Total - SELPA III	154.25	-	157.50	163.00	187.00	210.00	217.50	208.00	208.00	208.00	208.00	208.00	2,129.25	193.57	1,893,871.09
*San Jose Unif	131.00		151.25	150.25	172.00	157.00	149.50	154.50	154.50	154.50	154.50	154.50	1,683.50	153.05	1,497,396.73
Total - SELPA IV	131.00	-	151.25	150.25	172.00	157.00	149.50	154.50	154.50	154.50	154.50	154.50	1,683.50	153.05	1,497,396.73
Alum Rock	55.75		43.75	43.75	43.25	49.25	52.25	52.00	52.00	52.00	52.00	52.00	548.00	49.82	487,421.09
Berryessa	27.50		38.50	44.00	49.50	49.50	49.50	49.50	49.50	49.50	49.50	49.50	506.00	46.00	450,064.00
East Side	251.25		300.75	332.75	353.25	353.75	350.25	367.75	367.75	367.75	367.75	367.75	3,780.75	343.70	3,362,805.27
Evergreen	78.00		56.25	56.25	60.00	54.50	54.50	49.00	49.00	49.00	49.00	49.00	604.50	54.95	537,675.27
Fr-McKinley	27.75		33.00	33.00	33.00	33.00	24.50	27.50	27.50	27.50	27.50	27.50	321.75	29.25	286,182.00
Milpitas	26.50		22.00	22.00	16.50	16.50	22.75	22.75	22.75	22.75	22.75	22.75	240.00	21.82	213,469.09
Mt Pleasant	4.00		-	-	-	-	-	-	-	-	-	-	4.00	0.36	3,557.82
Oak Grove	23.50		29.00	29.00	31.50	37.00	31.50	31.50	31.50	31.50	31.50	31.50	339.00	30.82	301,525.09
Orchard	5.50		5.50	5.50	5.50	5.50	5.50	11.00	11.00	11.00	11.00	11.00	88.00	8.00	78,272.00
Gilroy	58.00		77.50	72.00	77.50	72.25	72.25	72.25	72.25	72.25	72.25	72.25	790.75	71.89	703,336.18
Morgan Hill	100.75		116.25	116.25	100.00	103.75	104.75	106.25	106.25	106.25	106.25	106.25	1,173.00	106.64	1,043,330.18
Total - SE SELPA	# 658.50	-	722.50	754.50	770.00	775.00	767.75	789.50	789.50	789.50	789.50	789.50	8,395.75	763.25	7,467,638.00
Santa Clara	79.00		86.00	73.50	85.00	85.25	92.75	92.75	92.75	92.75	92.75	92.75	965.25	87.75	858,546.00
Total - SELPA VII	79.00	-	86.00	73.50	85.00	85.25	92.75	92.75	92.75	92.75	92.75	92.75	965.25	87.75	858,546.00
Totals	1,103.50	-	1,206.75	1,236.25	1,292.50	1,305.75	1,300.50	1,323.75	1,323.75	1,323.75	1,323.75	1,323.75	14,064.00	1,278.55	12,509,288.73
														# of Months	
LCI Cost Share														11.00	
Cambrian	8.00	-	8.00	-	7.50	-	-	-	-	-	-	-	23.50	2.14	20,902.18
Campbell High	-	-	-	-	-	-	-	-	-	-	-	-			
Los Gatos Saratoga	5.50	-	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	60.50	5.50	53,812.00
Fremont	5.50	-	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	60.50	5.50	53,812.00
TOTAL															128,526.18

### 1:1 SPHC (Health Aide) Calculation

SPHC Health Aides

Scenario 5a

Block																
Programs	July 2018	August 2018	September 2018	October 2018	November 2018	December 2018	January 2019	February 2019	March 2019	April 2019	May 2019	June 2019	Total Hours	Ave Hours/Year	Total 1:1 SPHC Cost	
	Act		Act	Act	Act	Act	Act	Act	Est	Est	Est	Est		# of Months	1:1 SPHC Rate/Hr/Yr	
														11.00	\$	
Los Altos	-		-	-		-	-	-	-	-	-	-	-	-	-	-
Palo Alto	-		-	-		-	-	-	-	-	-	-	-	-	-	-
MV-Los Altos	-		-	-	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	48.00	4.36	49,173.82	
MV/Whisman	-		-	-		-	-	-	-	-	-	-	-	-	-	-
Total - SELPA I	-	-	-	-	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	48.00	4.36	49,173.82	
Fremont	6.00		6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	66.00	6.00	67,614.00	
Sunnyvale						-	-	-	-	-	-	-	-	-	-	-
Cupertino	6.00		6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	66.00	6.00	67,614.00	
Total - SELPA II	12.00	-	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	132.00	12.00	135,228.00	
Cambrian	22.75		18.00	38.50	28.75	36.25	36.25	30.25	30.25	30.25	30.25	30.25	331.75	30.16	339,862.80	
Campbell Elem	12.00		-	6.50	13.00	13.00	13.00	7.00	7.00	7.00	7.00	7.00	92.50	8.41	94,762.05	
Campbell High	34.25		29.50	29.00	30.00	30.50	30.50	30.50	30.50	30.50	30.50	30.50	336.25	30.57	344,472.84	
Loma Prieta						-	-	-	-	-	-	-	-	-	-	-
LG-Saratoga	-		-	-		-	-	-	-	-	-	-	-	-	-	-
Los Gatos Elem	6.00		-	-	-	-	8.00	8.00	8.00	8.00	8.00	8.00	54.00	4.91	55,320.55	
Luth Burbank						-	-	-	-	-	-	-	-	-	-	-
Moreland	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Saratoga													-	-	-	-
Union			-			6.00	6.00	6.00	6.00	6.00	6.00	6.00	42.00	3.82	43,027.09	
Lakeside						-	-	-	-	-	-	-	-	-	-	-
Total - SELPA III	75.00	-	47.50	74.00	71.75	85.75	93.75	81.75	81.75	81.75	81.75	81.75	856.50	77.86	877,445.32	
San Jose Unif	21.00		27.00	29.00	21.00	21.00	14.75	35.75	35.75	35.75	35.75	35.75	312.50	28.41	320,142.05	
Total - SELPA IV	21.00	-	27.00	29.00	21.00	21.00	14.75	35.75	35.75	35.75	35.75	35.75	312.50	28.41	320,142.05	
Alum Rock	6.00		6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	66.00	6.00	67,614.00	
Berryessa	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
East Side	46.00		46.25	45.75	45.75	50.25	60.50	61.00	61.00	61.00	61.00	61.00	599.50	54.50	614,160.50	
Evergreen	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fr-McKinley	7.50		7.00	7.00	7.00	7.00	5.50	12.50	12.50	12.50	12.50	12.50	103.50	9.41	106,031.05	
Milpitas	12.00		12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	132.00	12.00	135,228.00	
Mt Pleasant	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Oak Grove	7.00		7.00	13.00	13.00	13.00	13.00	15.00	15.00	15.00	15.00	15.00	141.00	12.82	144,448.09	
Orchard	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Gilroy	6.00		6.00	6.00	6.00	6.00	-	-	-	-	-	-	30.00	2.73	30,733.64	
Morgan Hill	6.00		6.00	6.00	-	-	5.50	6.00	6.00	6.00	6.00	6.00	53.50	4.86	54,808.32	
Total - SE SELPA	90.50	-	90.25	95.75	89.75	94.25	102.50	112.50	112.50	112.50	112.50	112.50	1,125.50	102.32	1,153,023.59	
Santa Clara	15.00		15.00	15.00	23.00	29.00	29.00	29.00	29.00	29.00	29.00	29.00	271.00	24.64	277,627.18	
Total - SELPA VII	15.00	-	15.00	15.00	23.00	29.00	29.00	29.00	29.00	29.00	29.00	29.00	271.00	24.64	277,627.18	
Totals	213.50	-	191.75	225.75	223.50	248.00	258.00	277.00	277.00	277.00	277.00	277.00	2,745.50	249.59	2,812,639.95	
														# of Months		
														11.00		
LCI Cost Share																
Cambrian	12.00	-	18.00	32.00	24.00	24.00	24.00	18.00	18.00	18.00	18.00	18.00	224.00	20.36	229,477.82	
Campbell ESD	6.00	-	-	-	7.00	13.00	13.00	7.00	7.00	7.00	7.00	7.00	74.00	6.73	75,809.64	
Campbell HSD	7.00	-	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	77.00	7.00	78,883.00	
TOTAL																384,170.45

					CCS	LCI - OI	SB 70	Scenario 5				
LCI					MTU	Transp.	NPS/LCI	Served in District Programs				
Attends COE						Wheelchair	Mental	Residence district at left				
Cost						to Districts	Health	Estimated Cost***				
#	#	#	Total					#	Subtotal	#	Subtotal	Total
Pupils	Pupils	Pupils	Cost					(Resident)	Cost	(Resident)	Cost	Dec/Apr
Oct 2017	Apr 2017							LCI Pupils	Dec 2017	LCI Pupils	April 2018	Ave.
Actual	Est	Ave						Dec 2017	Actual	April 2018	Actual	
Los Altos			-	-								-
Palo Alto			-	-	108,591							-
MV-Los Altos		1.00		57,246		-		1-ED, 1 OHI	52,455	-	-	26,228
Mt. View/Whisman			-	-								-
<b>SELPA I</b>	-	-	<b>1.00</b>	<b>57,246</b>	108,591	-						<b>26,228</b>
Fremont		1.00		98,831								-
Sunnyvale		-		-	54,295							-
Cupertino		-		-								-
<b>SELPA II</b>	-	-	<b>1.00</b>	<b>98,831</b>	54,295	-						-
Cambrian		14.00		899,851								-
Campbell Elem		9.00		500,187								-
Campbell High		9.00		486,702				1-SLD	18,003			9,002
Loma Prieta		-		-								-
LG-Saratoga		-		53,812				2 SLD	36,006	2-SLD	36,006	36,006
Los Gatos Elem		-		-				-	-	-	-	-
Luth Burbank		-		-								-
Moreland		-		-								-
Saratoga		-		-								-
Union		-		-								-
Lakeside		-		-								-
<b>SELPA III</b>	-	-	<b>32.00</b>	<b>1,940,551</b>	-		<b>0</b>					<b>45,008</b>
San Jose Unif		1.00		52,039				1-ED	34,452			17,226
<b>SELPA IV</b>	-	-	<b>1.00</b>	<b>52,039</b>			<b>0</b>					<b>17,226</b>
	1-Dec	1-Apr										
Alum Rock		-		-								-
Berryessa		1.00		-								-
East Side		24.00		-								-
Evergreen		1.00		-								-
Fr-McKinley		1.00		-								-
Milpitas		-		-								-
Mt Pleasant		-		-								-
Oak Grove		-		-								-
Orchard		-		-								-
<b>SELPA V</b>	-	-	<b>27.00</b>	<b>-</b>								-
Gilroy		4.00		-								-
Morgan Hill		4.00		-								-
<b>SELPA VI</b>	-	-	<b>8.00</b>	<b>-</b>								-
				<b>35.00</b>								
Santa Clara		1.00		57,246				-	-	1-SLD	18,003	9,002
<b>SELPA VII</b>	-	-	<b>1.00</b>	<b>57,246</b>			<b>0</b>					<b>9,002</b>
<b>NW Totals</b>	-	-	<b>36.00</b>	<b>2,205,913</b>	<b>162,886</b>	-	<b>0</b>	<b>6</b>		<b>3</b>		<b>97,463</b>

\*\*\*For this estimate, attending District Programs (from Average Cost Inter-district Transfer Calculation):

\$28,888 for Severe Disabilities and \$14,047 for Non-severe Disabilities as recommended by the SELPA Fiscal Subcommittee

TOTAL LCI COSTS 2,466,262

Updated as of 7/2

In fm Excess Out of Home 627,895

Severe Calc 2017-18

22,297.00	Ave SDC 8 less LCFF and AB602
5,498.00	Additional Classroom Aide
2,997.00	Sp/Lang Elem
3,660.00	OT
<b>34,452.00</b>	Severe Disabilities (E.D., Autistic, OI, TBI, ID)

Non-severe Calc 2017-18

12,505	Ave SDC 12 less LCFF and AB602
5,498	Additional Classroom Aide
<b>18,003</b>	Non-Severe Disabilities (SLD, OHI)

TOTAL LCI COSTS AFTER OHC OFFSET 1,838,366

\*\* Per Budget Allocation Plan, the cost of LCI students receiving services in SDC programs and in SCCOE programs and are residing in NW SELPAs will be shared by all districts based on percentage of total K-12 ADA. Cost sharing credits to districts for serving LCI residents in district SDC programs is aligned to Inter-district transfer agreements (severe/non-severe). Districts charged for sending LCI students to SCCOE programs will be credited the amount charged.

## Estimated share of cost of serving LCI pupils (by K-12 ADA)

			2018-19 P-1 K-12	Cost of Serving LCI pupils at COE	Cost of Serving LCI pupils at districts	SB 70	Total cost of serving LCI pupils
			ADA			CCS MTU	
						Cost Share and Trans	
Updated ADA -1/22/19							
		COE (incl					
SELPA I	915.50	Charter)	25,876.86	283,053	17,482	29,217	329,753
Los Altos	4,152.52	16.64%		47,088	2,908	4,861	54,857
Palo Alto	11,615.24	46.53%		131,713	8,135	13,596	153,443
MV-Los Altos	4,233.52	16.96%		48,007	2,965	4,955	55,927
MV/Whisman	4,960.08	19.87%		56,246	3,474	5,806	65,525
Districts Only Total	24,961.36	100.00%		283,053	17,482	29,217	329,753
SELPA II	17.88	COE	34,204.60	374,146	23,108	38,620	435,874
Fremont	10,732.06	31.39%		117,454	7,254	12,124	136,832
Sunnyvale	6,471.97	18.93%		70,830	4,375	7,311	82,516
		0.00%		0	0	0	0
Cupertino	16,982.69	49.68%		185,862	11,479	19,185	216,526
Districts Only Total	34,186.72	100.00%		374,146	23,108	38,620	435,874
		COE (incl					
SELPA III	568.30	Charter)	38,497.99	421,109	26,009	43,468	490,586
Cambrian	3,400.33	8.96%		37,752	2,332	3,897	43,980
Campbell Elem	7,082.84	18.67%		78,636	4,857	8,117	91,610
Campbell High	7,945.90	20.95%		88,218	5,449	9,106	102,773
Loma Prieta	479.58	1.26%		5,324	329	550	6,203
LG-Saratoga	3,422.72	9.02%		38,000	2,347	3,922	44,270
Los Gatos Elem	2,945.44	7.77%		32,701	2,020	3,375	38,097
Luth Burbank	499.16	1.32%		5,542	342	572	6,456
Moreland	4,580.35	12.08%		50,853	3,141	5,249	59,243
Saratoga	1,728.23	4.56%		19,187	1,185	1,981	22,353
Union	5,775.80	15.23%		64,125	3,961	6,619	74,705
Lakeside	69.34	0.18%		770	48	79	897
Districts Only Total	37,929.69	100.00%		421,109	26,009	43,468	490,586
		COE (incl					
SELPA IV	1,279.53	Charter)	30,874.31	337,718	20,858	34,860	393,436
San Jose Unif	29,594.78	100%		337,718	20,858	34,860	393,436
Districts Only Total	29,594.78						
SELPA VII	5.11	COE	14,809.34	161,992	10,005	16,721	188,718
Santa Clara	14,804.23	100%		161,992	10,005	16,721	188,718
Districts Only Total	14,804.23						
Districts Only Grand	141,476.78		144,263.10	1,578,018	97,463	162,886	1,838,366
Rate Per ADA by SELPA				10.94	0.68	1.13	12.74

Calculate per ADA by SELPA because COE ASD ADA complicates the calculation. It should be included, but can only be included at the SELPA level. Within the SELPA the amount is charged to districts at the percentage of district ADA to total ADA of districts within SELPA.

**SANTA CLARA COUNTY SELPAs**

**SCCOE SPECIAL EDUCATION HOUSING POLICY**

This policy covers housing for programs operated by the SCCOE Special Education Department on district operated sites. The policy shall apply to programs operated by SCCOE for three (3) to twenty-two (22) year old students and does not pertain to Regional Programs operated by districts. The policy shall remain in effect unless modified and approved by all SELPA Executive Councils in Santa Clara County.

**I. INTRODUCTION**

The districts of the Santa Clara County SELPAs are committed to the provision of special education services to all students with disabilities in the least restrictive environment as required by State and Federal law. It is the districts' obligation to assure that when it is not possible for students with disabilities to be educated in their home schools, they receive the services specified in their IEPs in classrooms located as close to their homes as possible. This goal is intended to fulfill the SELPA's purpose that the students and staff be included to the greatest extent possible as a part of the school community. To fulfill this commitment, the districts shall provide classroom space for all special education students in Santa Clara County.

Each school district accepts the ultimate responsibility for providing classroom facilities, or the financial resources to provide classroom facilities, for the special education students residing within its boundaries. A district may join with other districts in its area to provide classroom space or the financial support to house their students. The classroom needs of all students, both general and special education must be considered in all decisions regarding the allocation of classroom space. There may be times when a school district offers classroom space, which is not utilized by SCCOE (see page 2, item #7).

Maximum effort will be made to avoid the over representation of special education classes on an individual school site. In addition, classrooms should be located to promote natural opportunities for students with disabilities to participate with chronologically age-appropriate, general education students in academic, non-academic and extra-curricular activities to the maximum extent appropriate for the needs of both the special and general education students.

**II. POLICIES AND PROCEDURES**

The Santa Clara County SELPAs will be responsible for the implementation and monitoring of this policy. The SCCOE Special Education Department will assume responsibility for determination of classrooms owed and provided by each district, and will collaborate with the SELPA offices in the calculation and collection of housing fees and disbursement of housing compensation.

### III. PROVISION OF CLASSROOM SPACE BY DISTRICTS

#### A. Calculation of Projected Classroom Space Needed by Districts

Classroom space needed for those programs specified in this policy will be calculated using the following procedure:

1. The SCCOE Special Education Department's May 1<sup>st</sup> enrollment projections for the following year will serve as the basis for estimating the classroom space owed by each district in the subsequent school year.
2. Actual determination of housing obligations will be based on current year December-April average enrollment in SCCOE Special Education programs.
3. The number of pupils constituting one classroom for the purpose of the Housing Policy will be recommended each year by the Facilities Rate Setting Committee and approved in the SELPA Budget Allocation Plans along with Rate per class and percentage credit for land-only.
4. When the Santa Clara County Office of Education owns or leases a portable classroom located on district operated site, that classroom will generate partial credit toward the calculation of the district's housing obligation.
5. Each district will have two options for fulfilling its housing obligation.
  - The provision of classroom space. This is the preferable option.
  - In the event that a district does not provide the obligated classroom space, it will be charged a housing fee.
  - A SELPA may exercise the option of "pooling" member district obligations and/or compensation for space.
6. When a district exceeds its housing obligation by providing additional classroom space, the district will be paid the approved housing compensation rate.
7. Classroom space offered by the district must not only meet the standards specified in this policy, but must also be appropriate to the needs of the program operator.

Criteria for appropriateness include the following:

- the classroom offered provides for interaction with nondisabled peers
- usage of the classroom offered does not result in unusual additional costs to the SCCOE Special Education program
- usage of the classroom minimizes transportation time and cost
- there should be a sufficient population projections to sustain the classroom for at least three years
- there shall be minimal disruption or displacement for students in existing programs.

**B. Contracts for Provision of Classroom Space**

1. By February 28 of each year, districts will notify the SCCOE-Special Education Department of their intention to reclaim classroom space.
2. Negotiations between the SCCOE Special Education Department and districts for new contracts or other arrangements to provide classroom space shall be completed by May 30<sup>th</sup> of each year.
3. Contracts for classroom space shall be for a specific classroom site and it is recommended that it be for a minimum of three (3) years. The use of classrooms for Extended School Year programs is included in the contracts. The relocation of classrooms for Extended School Year programs shall be negotiated between the district and SCCOE Special Education Department by April 15.
4. Termination of contracts prior to their expiration date shall be by mutual consent of the district and SCCOE Special Education Department.

**C. Standard for Classrooms**

Classrooms provided by district, as a means of fulfilling their housing obligations shall meet the following standards, as appropriate:

1. One classroom (approximately 960 square feet) will be provided in accordance with established State and Federal standards (i.e., applicable Americans with Disabilities Act accessibility standards, Health and Safety Codes, fire alarm requirements, and Field Act standards, or a waiver of Field Act standards).
2. Running hot water will be provided in all classrooms where the availability of water within the classroom is necessary to meet the health and safety needs of the students, as determined by the SCCOE Special Education Department. Example: An accommodation for hot water could be an instant hot water heater.
3. Heat and Air Conditioning will be provided in all classrooms where the availability of heat and air conditioning within the classroom is necessary to meet the health and safety needs of the students, as determined by the SCCOE Special Education Department.
4. In-class toilet facilities will be provided as appropriate for the age and the needs of the students and as determined by the SCCOE Special Education Department with the approval of the district.

Students will have access to toileting facilities on campus available to all other students.

It is the intent of this policy to respect the privacy rights of special education students, which accord them with basic human dignity.

The toilet and/or changing area shall be large enough to accommodate personal hygiene activities.

5. Any site modifications, if needed, will be negotiated between the SCCOE Special Education Department and the district prior to modifications taking place.
6. The site will provide internet access in each classroom. SCCOE Special Education classrooms need comparable Internet access, as do the host site classrooms. SCCOE will be provided with one static IP

address and one live Ethernet jack in each Special Education classroom to set up VPN technology in each classroom.

D. Custodial Services

Custodial service, including daily classroom cleaning for all classrooms, including portables, whether district or SCCOE owned, shall be the responsibility of the district. Occasionally, there may be situation when the district is not able to provide custodial services and COE is required to provide it. Districts that don't provide Custodial and Utilities will pay actual cost to COE for providing them.

The SCCOE Special Education Department will provide information regarding recommended daily classroom cleaning as identified in the State publication, "State Guidelines and Procedures for Meeting the Specialized Physical Health Care Needs of Pupils.", and designated by level of need of classroom. (see attached).

E. Maintenance

Maintenance service shall be the responsibility of the owner of the facility. This includes regularly scheduled and preventative classroom maintenance such as filter replacements, carpet cleaning, floor polishing, light bulb replacements, etc.

F. Repairs

Classroom repair due to normal wear for such items as plumbing, windows, locks, roofs, ,cooling and heating systems, etc. shall be the responsibility of the owner of the facility.

Repairs of the facility for any damage caused by the program staff and/or students and repairs of the personal property owned by the program shall be the responsibility of the SCCOE Special Education Department.

G. Relocation of Classrooms

In the event a district has to relocate a SCCOE Special Education Department classroom due to planned renovations, fire, natural disaster, vandalism or other emergency situations when the classroom is unsuitable for housing students, the district remains responsible for providing adequate temporary housing until repairs can be completed. The district will make every effort to house the students on the same school site.

With respect to moving costs for COE classrooms, the following will apply:

- Fire or natural disaster: Insurance will be billed. If no insurance, cost will be borne centrally.
- Renovation by district: Cost will be borne centrally.
- COE moves class during ESY for safety: Cost will be borne centrally.
- District decision to consolidate classrooms for summer: Cost will be borne by district or district will move class.

IV. PROVISION OF NEW CLASSROOMS BY THE DISTRICT OR SCCOE SPECIAL EDUCATION DEPARTMENT ON DISTRICT PROPERTY



- A. New Construction by COE on District Property Requiring 40 Year Lease. The housing policy section concerning new construction (40 year leases): shall be reviewed every two years beginning with the 2007-08 school year.

Option 1

COE provides the custodial and utilities. District receives 45% credit times current agreed upon facilities housing rate times the number of actual classrooms provided.

Option 2

COE provides utilities and district provides custodial. District receives 71% credit times current agreed upon facilities housing rate times the number of actual classrooms provided.

- B. When constructing new classrooms or acquiring a new portable, not requiring a 40 year lease, the SCCOE Special Education Department and the district will meet to negotiate any one-time cost.

For example:

- Site preparation
- Water and sewer hook-up
- Architectural and other fees

Classrooms provided by new construction shall meet all of the requirements specified in Section IIIC, Standards for Classrooms.

V. RESPONSIBILITY FOR PORTABLE CLASSROOMS PLACED BY THE SCCOE SPECIAL EDUCATION DEPARTMENT ON DISTRICT PROPERTY

When the SCCOE Special Education Department brings a portable onto district property, the following shall apply:

1. SCCOE Special Education Department shall be responsible for all requirements specified in Section IIIC (Standards for Classrooms).
2. Custodial service, including daily classroom cleaning for all classrooms, shall be the responsibility of the district or negotiated between the district and SCCOE Special Education Department. The SCCOE Special Education Department will provide information regarding daily classroom cleaning as identified in the State publication, "State Guidelines and Procedures for Meeting the Specialized Physical Health Care Needs of Pupils."
3. Whenever possible, actual maintenance/repair shall be provided by the local school district. Cost for maintenance service, classroom repair due to normal wear and tear or any site improvements should be the responsibility of the SCCOE Special Education Department or negotiated between the SCCOE Special Education Department and the district.

VI. FINANCIAL ARRANGEMENTS

1. Districts are obligated to provide classroom space (or financial resources to provide classroom space) for the number of resident students enrolled in SCCOE Special Education Department operated programs. This obligation includes classroom space, utilities, custodial services and such maintenance and repair as specified in this document.
2. The SELPA facilities committee each year will recommend the value to be placed on classrooms provided, which are over or under a district's obligation. The value placed will be in consideration of the following factors: average cost of utilities, average cost of custodial services and routine maintenance/repair, average cost of a leased portable, and reasonable lease rate for classroom space on an open school campus. The value placed on classrooms, and the fraction thereof allowable for land (utilities and custodial/maintenance service) shall be pending approval of all SELPA Executive Councils in the county.
  - a) The Facilities Rate Setting Committee will meet prior to March of each year to recommend and finalize the rate/number of pupils per class and percentage of credit for land-only for the following year. The rate suggested at the December 2010 meeting will stay in effect for the 2011-2012 year.
  - b) The committee will be comprised of district special education program and fiscal representatives. The intention of the committee is to reach agreement using the following priorities:
    - Consensus of all present at the Facilities Rate Setting Meeting with a quorum consisting of representation from all SELPAs and a minimum of five fiscal and/or program administrators from Southeast and five fiscal and/or program administrators from Northwest SELPAs.
    - Dispute resolution (SELPA Directors, and an outside mediator)
  - c) The SELPA AU Directors and SCCOE Special Education staffs are not members of the committee that decides consensus.
3. Housing fees for the number of spaces that a district is short of its obligation will be added to the estimate of cost of COE programs for that district. Housing compensation for the number of spaces that a district provides, which are over its obligation, will be estimated, but not credited against, the district's cost of COE programs. This amount will be a Revenue Transfer for Housing Compensation at the end of each year.
4. SELPA Fiscal Advisors will assess the Excess or Deficit in revenue resulting from the Housing Policy at the end of each year looking only at the year to either refund any excess or collect from districts any deficit when the excess or deficit is greater than or equal to the current facilities rate for a COE classroom. In that case, the entire excess will be distributed or deficit charged back based on current pupil count used in facility cost calculations. This process began in 2008-2009 and will continue annually thereafter. Included in the assessment will be other contract costs related to Facility costs, moving expenses, set-up and remodel fees and indirect costs. Also included will be other lease revenue collected by SCCOE Special Education.

### OVERSIGHT COMMITTEE

1. An Oversight Committee will be established that is composed of SELPA Directors and SCCOE Director of Special Education.
2. The Oversight Committee will be responsible for the following:
  - the SELPA Directors and COE Director will meet with district directors to review needs and availability of classroom space; and
  - the Oversight Committee will meet, if necessary, to review appropriateness of offers submitted by districts for use of classrooms.

Approved SELPA I	June 14, 2007
Approved SELPA II	June 15, 2007
Approved SELPA III	June 14, 2007
Approved SELPA IV	June 18, 2007
Approved SELPA VII	June 18, 2007
Approved SECSE	June 20, 2007

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Approved SELPA I	May 19, 2011
Approved SELPA II	May 27, 2011
Approved SELPA III	May 19, 2011
Approved SELPA IV	May 18, 2011
Approved SELPA VII	May 19, 2011
Approved SECSE	May 18, 2011

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Approved SELPA I	May 14, 2015
Approved SELPA II	May 15, 2015
Approved SELPA III	May 14, 2015
Approved SELPA IV	May 19, 2015
Approved SELPA VII	May 13, 2015
Approved SECSE	May 20, 2015

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Approved SELPA I	May 19, 2016
Approved SELPA II	May 20, 2016
Approved SELPA III	May 19, 2016
Approved SELPA IV	May 18, 2016
Approved SELPA VII	May 18, 2016
Approved SECSE	May 18, 2016

## ***SCCOE Classroom Custodial Requirements:***

### **Level 1 – Daily Intensive:**

Custodial Staff will follow “✱” section of *Guidelines & Procedures for Meeting the Specialized Physical Health Care Needs of Pupils*. (see attached)

### **Level 2 - Daily:**

Clean Floors – Vacuum / mop  
Empty Garbage  
Clean sinks and toilets (if in classroom)  
  
Steam clean carpets on regular school schedule

### **Level 3 – Routine:**

Same level of custodial services as the regular education classes at that site.

## SCCOE Minimum Classroom Requirements:

Blocks	Custodial	Plumbing, etc.
<ol style="list-style-type: none"> <li>1. Autism</li> <li>2. Deaf/Hard of Hearing</li> <li>3. Emotionally Disturbed</li> <li>4. Basic – Ambulatory – No Medical Procedures</li> </ol> <ul style="list-style-type: none"> <li>• Pre-school/Primary</li> <li>• Upper Elementary</li> <li>• MS/HS/Post-Senior</li> </ul>	<ul style="list-style-type: none"> <li>• Level 1 - Daily – Intensive</li> <li>• Level 2 - Daily</li> <li>• Level 3 - Routine</li> </ul>	<ul style="list-style-type: none"> <li>• Water in classroom: Bathroom in classroom or dedicated bathroom*</li> <li>• Water in classroom</li> <li>• Water in classroom if available</li> </ul>
<ol style="list-style-type: none"> <li>1. Basic – Non-Ambulatory –Medical Procedures</li> <li>2. Orthopedically Impaired</li> <li>3. Medically Fragile</li> </ol> <ul style="list-style-type: none"> <li>• Pre-school/Primary</li> <li>• Upper Elementary</li> <li>• MS/HS/Post-Senior</li> </ul>	<ul style="list-style-type: none"> <li>• Level 1 - Daily – Intensive</li> <li>• Level 1 - Daily – Intensive</li> <li>• Level 1 - Daily – Intensive</li> </ul>	<ul style="list-style-type: none"> <li>• Water in classroom: Bathroom in classroom or dedicated bathroom</li> <li>• Water in classroom: Bathroom in classroom or dedicated bathroom</li> <li>• Water in classroom: Bathroom in classroom or dedicated bathroom</li> </ul>

- \*Dedicated bathroom may not be needed for *Primary ED or D/HOH* depending on students' level of independence in toileting skills.
- \*Water in classroom needs to be Hot and Cold



**APPENDIX G**  
**IDEA PART B FEDERAL GRANTS**

1. Local Assistance (Resource 3310)
2. Private School Calculation (Resource 3311)
3. Federal Preschool (Resource 3315)
4. Preschool Staff Development (Resource 3345)
5. Alternative Dispute Resolution Grant (Resource 3395)
6. See Mental Health Section for Fed MH Grant (Resource 3327), Appendix H



IDEA, Part B, federal funds support the expense of educating identified students with disabilities.

**Local Assistance Entitlements (PCA 13379/Resource Code 3310)**

This grant is one portion of the federal subgrants to LEAs. The subgrants are based on a three-part formula: a base amount, a percentage of population, and a percentage of poverty. All Special Education Local Plan Areas (SELPA)s receive a base amount of \$323,428,031 statewide, divided by December 1999 pupil count. Of the funds in excess of the base amount, 85 percent are allocated on the basis of the relative number of children enrolled in public and private elementary and secondary schools within each SELPA's jurisdiction, and 15 percent on the basis of the relative number of children living in poverty using free and reduced price meal participation as the indicator of poverty. Adjustments to the base amount are required if a new SELPA is created, if one or more SELPAs are combined, or if SELPA geographical or administrative boundaries change. Districts must account for these funds as expenditures for pupils with an individualized education program (IEP) and for the provisions of the special education and related services required by students with disabilities in order to benefit from a public education.

This grant is allocated for students five through twenty-one years of age. Two other grants comprise of the total subgrants to LEAs: 1) State Institutions (13008) and 2) Preschool Local Entitlements (13682).

**Federal Preschool Program (PCA 13430/Resource Code 3315)**

The federal Preschool Instructional Programs provide funding for special education and services to children with disabilities ages three through five. This funding comes from IDEA, Part B, § 619.

**Preschool Staff Development (PCA 13431/Resource Code 3345)**

Preschool Staff Development funds provide for local staff development opportunities for those who work in infant and preschool programs. The funds are disseminated on a pro-rata basis based on the prior year December student count, ages three through five. The minimum grant per SELPA is \$1,000. The source of funds is the federal Preschool Grant (IDEA, Part B, § 619).

**Alternate Dispute Resolution (PCA 13007/Resource Code 3395)**

Alternate Dispute Resolution (ADR) grants are funded through the IDEA, Part B. The CDE finds that the ADR process is a desirable and effective practice that supports the positive interaction and collaboration among parents and educators and promotes in assisting parents and educational agencies in the implementation of the use of conflict resolution throughout the state.

The CDE awards these grants to regional consortia that include LEAs and county offices. Selected LEAs will train and implement an ADR process in responding to and resolving local complaints and concerns regarding the implementation of the IDEA, Part B and relevant state laws. (Budget Act, Item 6110-161-0890, Schedule 2, Provision 2)



# 2019-20 ESTIMATED FEDERAL LOCAL ASSISTANCE DISTRIBUTION

RESOURCE 3310, PCA 13379

GRANT AWARD PERIOD: JULY 01, 2019 THROUGH SEPTEMBER 30, 2021



SELPA <sup>1</sup>	DISTRICT	GRANT AWARD	DISTRIBUTE PRESCHOOL % BY (PRIOR YEAR) 12/1/18 PRE-K COUNT	DISTRIBUTE BALANCE BY (PRIOR YEAR) JUNE P-2 TOTAL K-12 ADA	PAYMENT FOR COE USAGE <sup>2</sup>	NET GRANT AMOUNT DISTRIBUTION ("BEFORE" PRIVATE SCHOOL PROP SHARE) <sup>3</sup>
			<u>8.28%</u>	<u>91.72%</u>		
I	SCCOE		\$ -	\$ -	\$ 11,564.00	\$ 11,564.00
I	SCCOE CHARTER - BULLIS		\$ -	\$ 160,472.00	\$ -	\$ 160,472.00
I	LOS ALTOS		\$ 89,194.00	\$ 742,369.00	\$ -	\$ 831,563.00
I	MV/WHISMAN		\$ 214,877.00	\$ 886,741.00	\$ (1,927.00)	\$ 1,099,691.00
I	MT VW/L ALTS		\$ -	\$ 760,046.00	\$ (9,637.00)	\$ 750,409.00
I	PALO ALTO		\$ 113,521.00	\$ 2,076,521.00	\$ -	\$ 2,190,042.00
	<b>SUB-TOTAL SELPA I:</b>	<b>\$ 5,043,741.00</b>	<b>\$ 417,592.00</b>	<b>\$ 4,626,149.00</b>	<b>\$ -</b>	<b>\$ 5,043,741.00</b>
	RATE PER ADA	\$ 194.91	-	-	-	-
			<u>9.01%</u>	<u>90.99%</u>		
II	SCCOE		\$ -	\$ -	\$ 92,623.00	\$ 92,623.00
II	CUPERTINO		\$ 260,001.00	\$ 2,659,721.00	\$ (42,285.00)	\$ 2,877,437.00
II	FREMONT		\$ -	\$ 1,683,588.00	\$ (34,230.00)	\$ 1,649,358.00
II	SUNNYVALE		\$ 270,721.00	\$ 1,013,599.00	\$ (16,108.00)	\$ 1,268,212.00
	<b>SUB-TOTAL SELPA II:</b>	<b>\$ 5,887,630.00</b>	<b>\$ 530,722.00</b>	<b>\$ 5,356,908.00</b>	<b>\$ -</b>	<b>\$ 5,887,630.00</b>
	RATE PER ADA	\$ 172.13	-	-	-	-
			<u>9.57%</u>	<u>90.43%</u>		
III	SCCOE		\$ -	\$ -	\$ 347,380.00	\$ 347,380.00
III	SCCOE CHARTER - DISCOVERY CHARTER		\$ -	\$ 96,203.00	\$ -	\$ 96,203.00
III	CAMBRIAN		\$ 123,510.00	\$ 600,996.00	\$ (43,215.00)	\$ 681,291.00
III	CAMPBLL ELM		\$ 240,995.00	\$ 1,251,866.00	\$ (64,822.00)	\$ 1,428,039.00
III	CAMPBLL HS		\$ -	\$ 1,408,651.00	\$ (136,293.00)	\$ 1,272,358.00
III	LAKEIDE		\$ 9,037.00	\$ 12,256.00	\$ (1,662.00)	\$ 19,631.00
III	LOMA PRIETA		\$ 6,025.00	\$ 84,764.00	\$ -	\$ 90,789.00
III	LOS GATOS		\$ 27,112.00	\$ 520,596.00	\$ (11,635.00)	\$ 536,073.00
III	LG/SARATOGA		\$ -	\$ 604,953.00	\$ (16,621.00)	\$ 588,332.00
III	LTHR BURBNK		\$ 9,037.00	\$ 88,225.00	\$ (4,986.00)	\$ 92,276.00
III	MORELAND		\$ 129,535.00	\$ 809,560.00	\$ (28,256.00)	\$ 910,839.00
III	SARATOGA		\$ 15,062.00	\$ 305,458.00	\$ (3,324.00)	\$ 317,196.00
III	UNION		\$ 159,659.00	\$ 1,020,851.00	\$ (36,566.00)	\$ 1,143,944.00
	<b>SUB-TOTAL SELPA III:</b>	<b>\$ 7,524,351.00</b>	<b>\$ 719,972.00</b>	<b>\$ 6,804,379.00</b>	<b>\$ -</b>	<b>\$ 7,524,351.00</b>
	RATE PER ADA	\$ 195.45	-	-	-	-
<b>SELPA IV Uses PY Dec Pupil Count</b>						
IV	SCCOE				\$ 338,897.00	\$ 338,897.00
IV	SCCOE CHARTER - UNIV PREP			\$ 41,960.00	\$ -	\$ 41,960.00
IV	SCCOE CHARTER - DISCOVERY II			\$ 156,397.00	\$ -	\$ 156,397.00
IV	SJUSD			\$ 6,374,143.00	\$ (338,897.00)	\$ 6,035,245.00
	<b>SUB-TOTAL SELPA IV:</b>	<b>\$ 6,572,499.00</b>		<b>\$ 6,572,500.00</b>	<b>\$ -</b>	<b>\$ 6,572,499.00</b>
	RATE PER PUPIL COUNT	\$ 1,755.94				-
VII	COE			\$ -	\$ 69,237.00	\$ 69,237.00
VII	COE-CHARTER			\$ -	\$ -	\$ -
VII	SC UNIFIED			\$ 2,920,157.00	\$ (69,237.00)	\$ 2,850,920.00
	<b>SUB-TOTAL SELPA VII:</b>	<b>\$ 2,920,157.00</b>		<b>\$ 2,920,157.00</b>	<b>\$ -</b>	<b>\$ 2,920,157.00</b>
	RATE PER ADA	\$ 197.18				-
	<b>TOTAL GRANT AMOUNT - NW SELPA</b>	<b>\$27,948,378.00</b>				<b>\$ 27,948,378.00</b>
						-
	TOTAL GRANT AMOUNT - COE	FUND 820 (NW SELPA portion only)				\$ 859,701.00
	TOTAL GRANT AMOUNT - CHARTERS	FUND 882				\$ 455,032.00
	TOTAL GRANT AMOUNT - DISTRICTS	FUND 100				\$ 26,633,645.00
	<b>TOTAL GRANT AMOUNT - NW SELPA</b>					<b>\$ 27,948,378.00</b>

# 2019-20 \*\*ESTIMATED\*\* PRIVATE SCHOOL PROPORTIONATE SHARE CALCULATION

New in 2018-19!! The PSPS will be reported as a SELPAwide amount for ages 3-21. Age changed due to consolidation of Resource #3320 grant into Resource #3310.

CODE (PLAN TYPE) AGE GROUP	CODE 70 *DISTRICT OF LOCATION*		CODE 20 (ISP) *DISTRICT OF LOCATION*		TOTAL NUMBER OF PARENTALLY-PLACED IDEA- ELIGIBLE SWD		CODE 10 (IEP)		TOTAL ELIGIBLE PUPILS (CODE 70+20+10) E=C+D	2019-20 SPENDING RATIO F=C/E	*ESTIMATED* FEDERAL LOCAL ASSISTANCE GRANT AMOUNT (RESOURCE 3310) G	*ESTIMATED* AMOUNT FOR PRIVATE SCHOOL PROPORTIONATE SHARE (RESOURCE 3311) (Taken from Re 3310) H=F*G
	6/30/2018 3-21 YRS OLD	12/1/2017 3-21 YRS OLD	6/30/2018 3-21 YRS OLD	12/1/2017 3-21 YRS OLD	C=A+B (CODE 70+20)	D (CODE 10)	12/1/2017 3-21 YRS OLD	12/1/2017 3-21 YRS OLD				
DATE OF COUNT	A	B										
LOS ALTOS ELEMEN	0	8			8	410			418	1.9139%	\$ 831,563.00	\$ 15,915.00
PALO ALTO USD	7	7			14	1114			1128	1.2411%	\$ 2,190,042.00	\$ 27,181.00
MV/LA	0	5			5	491			496	1.0081%	\$ 750,409.00	\$ 7,565.00
MV/WHISMAN	1	2			3	526			529	0.5671%	\$ 1,099,691.00	\$ 6,236.00
COE - BULLIS	0	0			0	0			0	#DIV/0!	\$ 160,472.00	\$ -
COE	0	0			0	59			59	0.00%	\$ 11,564.00	\$ -
<b>SELPA I</b>											<b>\$ 5,043,741.00</b>	<b>\$ 56,897.00</b>
FREMONT	1	1			2	1017			1019	0.1963%	\$ 1,649,358.00	\$ 3,237.00
SUNNYVALE	0	5			5	732			737	0.6784%	\$ 1,268,212.00	\$ 8,604.00
CUPERTINO	9	10			19	1305			1324	1.4350%	\$ 2,877,437.00	\$ 41,293.00
COE - SPARK	0	0			0	0			0	#DIV/0!	\$ -	\$ -
COE	0	0			0	0			0	#DIV/0!	\$ 92,623.00	\$ -
<b>SELPA II</b>											<b>\$ 5,887,630</b>	<b>\$ 53,134</b>
CAMBRIAN	1	2			3	443			446	0.6726%	\$ 681,291.00	\$ 4,583.00
CAMPBELL ESD	4	3			7	780			787	0.8895%	\$ 1,428,039.00	\$ 12,702.00
CAMPBELL HSD	0	1			1	851			852	0.1174%	\$ 1,272,358.00	\$ 1,493.00
LAKESIDE	0	0			0	16			16	0.0000%	\$ 19,631.00	\$ -
LOMA PRIETA	0	0			0	51			51	0.0000%	\$ 90,789.00	\$ -
LOS GATOS	0	1			1	234			235	0.4255%	\$ 536,073.00	\$ 2,281.00
LG-SARATOGA	0	0			0	357			357	0.0000%	\$ 588,332.00	\$ -
LUTH.BURBANK	0	0			0	50			50	0.0000%	\$ 92,276.00	\$ -
MORELAND	3	5			8	528			536	1.4925%	\$ 910,839.00	\$ 13,595.00
SARATOGA	3	6			9	203			212	4.2453%	\$ 317,196.00	\$ 13,466.00
UNION	2	5			7	624			631	1.1094%	\$ 1,143,944.00	\$ 12,690.00
COE-DISCOVERY	0	0			0	0			0	#DIV/0!	\$ 96,203.00	\$ -
COE	0	0			0	510			510	0.00%	\$ 347,380.00	\$ -
<b>SELPA III</b>											<b>\$ 7,524,351</b>	<b>\$ 60,810.00</b>
SAN JOSE USD	5	13			18	3526			3544	0.5079%	\$ 6,035,245.00	\$ 30,653.00
COE-UNIV PREP	0	0			0	0			0	#DIV/0!	\$ 41,960.00	\$ -
COE-DISCOVERY II	0	0			0	0			0	#DIV/0!	\$ 156,397.00	\$ -
COE	0	0			0	411			411	0.00%	\$ 338,897.00	\$ -
<b>SELPA IV</b>											<b>\$ 6,572,499</b>	<b>\$ 30,653.00</b>
SANTA CLARA USD	9	0			9	2195			2204	0.4083%	\$ 2,850,920.00	\$ 11,642.00
COE	0	0			0	50			50	0.00%	\$ 69,237.00	\$ -
<b>SELPA VII</b>											<b>\$ 2,920,157</b>	<b>\$ 11,642.00</b>

\* CODE 10 – Student is attending public school and receiving special education services through an IEP.

\* CODE 20 – Student is parentally placed at a private school, qualifies for special education services and is receiving special education services at the public school through an IEP.

\* CODE 70 – Student is parentally placed at a private school, qualifies for special education services but NOT receiving services at the public school.

1. The proportionate share must be spent for the group of parentally placed children in private schools. This amount must be reported under Resource 3311.

2. The COE is requiring the submission of a budget plan that provides estimated expenditures and an explanation of the intent to expend funds by September 30, 2020, in order to ensure the districts are fully expending federal funds within the grant award per

## 2019-20 ESTIMATED FEDERAL PRESCHOOL GRANT DISTRIBUTION

RESOURCE 3315, PCA 13430

GRANT AWARD PERIOD: JULY 01, 2019 THROUGH SEPTEMBER 30, 2021



DISTRICT	SELPA	GRANT AWARD	TOTAL PRESCHOOLERS (AGES 3-5) 12/01/2018 (PY) PUPIL COUNT DOS	PER PUPIL AMOUNT	NET GRANT AMOUNT DISTRIBUTION
COE	I		-	\$ 1,274.25	\$ -
COE-Bullis	I		-	\$ 1,274.25	\$ -
LOS ALTOS	I		22	\$ 1,274.25	\$ 28,034.00
MV/Whisman	I		53	\$ 1,274.25	\$ 67,535.00
PALO ALTO	I		28	\$ 1,274.25	\$ 35,679.00
<b>TOTAL SELPA</b>	<b>I</b>	<b>\$ 131,248.00</b>	<b>103</b>		<b>\$ 131,248.00</b>
					\$ -
COE	II		-	\$ 776.34	\$ -
SPARK	II		-	\$ 776.34	\$ -
CUPERTINO	II		97	\$ 776.34	\$ 75,305.00
SUNNYVALE	II		101	\$ 776.34	\$ 78,410.00
<b>TOTAL SELPA</b>	<b>II</b>	<b>\$ 153,715.00</b>	<b>198</b>		<b>\$ 153,715.00</b>
					\$ -
COE	III		68	\$ 755.28	\$ 51,358.00
COE - Discovery	III		-	\$ 755.28	\$ -
CAMBRIAN	III		41	\$ 755.28	\$ 30,966.00
CAMPBELL ELEM	III		80	\$ 755.28	\$ 60,422.00
LAKESIDE	III		3	\$ 755.28	\$ 2,266.00
LOMA PRIETA	III		2	\$ 755.28	\$ 1,511.00
LOS GATOS	III		9	\$ 755.28	\$ 6,798.00
LUTHER BURBANK	III		3	\$ 755.28	\$ 2,266.00
MORELAND	III		43	\$ 755.28	\$ 32,477.00
SARATOGA	III		5	\$ 755.28	\$ 3,776.00
UNION	III		53	\$ 755.28	\$ 40,030.00
<b>TOTAL SELPA</b>	<b>III</b>	<b>\$ 231,870.00</b>	<b>307</b>		<b>\$ 231,870.00</b>
					\$ -
COE	IV		23	\$ 559.53	\$ 12,869.00
COE-Univ Prep	IV		-	\$ 559.53	\$ -
SAN JOSE USD	IV		209	\$ 559.53	\$ 116,943.00
<b>TOTAL SELPA</b>	<b>IV</b>	<b>\$ 129,812.00</b>	<b>232</b>		<b>\$ 129,812.00</b>
					\$ -
COE	VII		-	\$ 533.08	\$ -
SANTA CLARA	VII		167	\$ 533.08	\$ 89,025.00
<b>TOTAL SELPA</b>	<b>VII</b>	<b>\$ 89,025.00</b>	<b>167</b>		<b>\$ 89,025.00</b>
					\$ -
<b>TOTAL GRANT AMOUNT - NW SELPA</b>		<b>\$ 735,670.00</b>	<b>1,007</b>		<b>\$ 735,670.00</b>
					\$ -
<b>TOTAL GRANT AMOUNT - COE</b>	<b>FUND 820 (NW SELPA portion only)</b>		<b>91</b>		<b>\$ 64,227.00</b>
<b>TOTAL GRANT AMOUNT - CHARTERS</b>	<b>FUND 882</b>		<b>-</b>		<b>\$ -</b>
<b>TOTAL GRANT AMOUNT - DISTRICTS</b>	<b>FUND 100</b>		<b>916</b>		<b>\$ 671,443.00</b>
<b>TOTAL GRANT AMOUNT - NW SELPA</b>			<b>1,007</b>		<b>\$ 735,670.00</b>

**2019-20 ESTIMATED PRESCHOOL STAFF DEVELOPMENT GRANT DISTRIBUTION**  
**RESOURCE 3345, PCA 13431**  
**GRANT AWARD PERIOD: JULY 01, 2019 THROUGH SEPTEMBER 30, 2021**



DISTRICT	SELPA	GRANT AWARD	PER PUPIL AMOUNT	TOTAL PRESCHOOLERS (AGES 3-5) 12/01/2017 (PY) PUPIL COUNT DOS	NET GRANT AMOUNT DISTRIBUTION
COE	I		\$9.71	-	\$ -
COE - BULLIS	I		\$9.71	-	\$ -
LOS ALTOS	I		\$9.71	22	\$ 214.00
MV/WHISMAN	I		\$9.71	53	\$ 515.00
MT VW/L ALTS	I		\$9.71	-	\$ -
PALO ALTO	I		\$9.71	28	\$ 271.00
<b>TOTAL SELPA</b>	<b>I</b>	<b>\$ 1,000.00</b>		<b>103</b>	<b>\$ 1,000.00</b>
COE	II		\$5.54	-	\$ -
CUPERTINO	II		\$5.54	97	\$ 536.00
FREMONT	II		\$5.54	-	\$ -
SUNNYVALE	II		\$5.54	101	\$ 561.00
<b>TOTAL SELPA</b>	<b>II</b>	<b>\$ 1,097.00</b>		<b>198</b>	<b>\$ 1,097.00</b>
COE	III		\$4.85	68	\$ 330.00
COE-DISCOVERY	III		\$4.85	-	\$ -
CAMBRIAN	III		\$4.85	41	\$ 199.00
CAMPBLL ELM	III		\$4.85	80	\$ 388.00
CAMPBLL HS	III		\$4.85	-	\$ -
LAKESIDE	III		\$4.85	3	\$ 15.00
LOMA PRIETA	III		\$4.85	2	\$ 10.00
LOS GATOS	III		\$4.85	9	\$ 44.00
LG/SARATOGA	III		\$4.85	-	\$ -
LTHR BURBNK	III		\$4.85	3	\$ 15.00
MORELAND	III		\$4.85	43	\$ 209.00
SARATOGA	III		\$4.85	5	\$ 24.00
UNION	III		\$4.85	53	\$ 255.00
<b>TOTAL SELPA</b>	<b>III</b>	<b>\$ 1,489.00</b>		<b>307</b>	<b>\$ 1,489.00</b>
COE	IV		\$5.06	23.00	\$ 116.00
COE-UNIV PREP	IV		\$5.06	-	\$ -
SJUSD	IV		\$5.06	209.00	\$ 1,059.00
<b>TOTAL SELPA</b>	<b>IV</b>	<b>\$ 1,175.00</b>		<b>232</b>	<b>\$ 1,175.00</b>
COE	VII		\$5.99	-	\$ -
SC UNIFIED	VII		\$5.99	167	\$ 1,000.00
<b>TOTAL SELPA</b>	<b>VII</b>	<b>\$ 1,000.00</b>		<b>167</b>	<b>\$ 1,000.00</b>
<b>TOTAL GRANT AMOUNT - NW SELPA</b>		<b>\$ 5,761.00</b>		<b>1,007</b>	<b>\$ 5,761.00</b>

TOTAL GRANT AMOUNT - COE	FUND 820			91	\$ 446.00
TOTAL GRANT AMOUNT - CHARTERS	FUND 882			-	\$ -
TOTAL GRANT AMOUNT - DISTRICTS	FUND 100			916	\$ 5,315.00
<b>TOTAL GRANT AMOUNT - NW SELPA</b>				<b>1,007</b>	<b>\$ 5,761.00</b>

Counts all 3 and 4 year olds by age, and 5 year olds coded as "preschoolers".

**2019-20 \*ESTIMATED\* ALTERNATE DISPUTE RESOLUTION GRANT - Expansion Program**  
**RESOURCE 3395, PCA 13007**  
**GRANT AWARD PERIOD: JULY 01, 2019 THROUGH SEPTEMBER 30, 2021**  
*Grant Award Received October 2019*

SELPA	GRANT AWARD
SELPA 1	\$ 14,601.00
SELPA 2	\$ 14,601.00
SELPA 3	\$ 14,601.00
SELPA 4	\$ 14,601.00
SELPA 7	\$ 14,601.00



## **APPENDIX H**

### **MENTAL HEALTH FUNDING**

These grants are both distributed to SELPAs by CDE using P2 Total K-12 ADA. The Federal MH Grant is not expected to change after the initial Grant Letters were received. But changes to the SELPA State MH Award amounts will be expected when current P2 ADA is finalized.

1. Estimate of State Mental Health (Resource 6512)
2. Federal Mental Health Services Grant (Resource 3327)
3. Guidance on Use of Mental Health Funds
  - a) CDE letter (Sept. 13, 2011) Assembly Bill 114: Related Services under the IDEA
  - b) CDE letter (Jan. 5, 2012) on Use of AB 114 Mental Health Funds



**Mental Health Average Daily Attendance (PCA 15197/Resource Code 3327)**

The Mental Health Average Daily Attendance (ADA) grants are funded through Individuals with Disabilities Education Act (IDEA), Part B. Grant funds shall be available only for the purpose of providing educationally-related mental health services, including out-of-home residential services for emotionally disturbed students, required by an Individualized Education Plan (IEP) pursuant to the federal IDEA of 2004 (20 USC Sec. 1400 et seq.) and as described in Section 56363 of the *Education Code (EC)*. The grant awards allocated to each Special Education Local Plan Area (SELPA) are calculated on the basis of prior year P-2 ADA.

**Special Education Mental Health Services (Resource Code 6512)**

The purpose of these funds is to provide educationally related mental health services, including out-of-home residential services for emotionally disturbed student(s), required by an individualized education program pursuant to the federal Individuals with Disabilities Education Act and as described in Section 56363 of the California Education Code (EC).



Grant Award Letter received as of 10/25/19

10/21/2019

GRANT AWARD	NET GRANT DISTRIBUTION	DISTRIBUTION METHOD
	\$ -	
	\$ 8,961.00	*Estimate*
	\$ 41,471.00	(PRIOR YEAR) JUNE P-2
	\$ 135,836.00	TOTAL K-12 ADA
	\$ 63,792.00	HIGH SCHOOL DISTRICTS
	\$ 49,797.00	WEIGHTED AT 1.5
		(INC COE, EXC AED)
\$ 299,857.00	\$ 299,857.00	
	\$ -	*Estimate*
	\$ -	SELPA II - 100%
	\$ 396,792.00	DISTRIBUTION TO HIGH
	\$ -	SCHOOL DISTRICT *
	\$ -	
\$ 396,792.00	\$ 396,792.00	
	\$ -	
	\$ -	
	\$ 6,318.00	
	\$ 39,245.00	
	\$ 81,776.00	*Estimate*
	\$ 92,443.00	SELPA III -
	\$ 780.00	(PRIOR YEAR)
	\$ 5,550.00	JUNE P-2 ADA
	\$ 34,182.00	(Approved by SELPA 3
	\$ 39,565.00	Exec Council on
	\$ 5,824.00	10/17/19)
	\$ 53,038.00	
	\$ 20,073.00	
	\$ 67,010.00	
\$ 445,804.00	\$ 445,804.00	
	\$ -	*Estimate*
	\$ 5,679.00	(PRIOR YEAR) 12/1/2018
	\$ 2,840.00	ED PUPIL COUNT
	\$ 349,273.00	
\$ 357,792.00	\$ 357,792.00	
	\$ -	
	\$ 171,138.00	*Estimate*
\$ 171,138.00	\$ 171,138.00	(PRIOR YEAR) 12/1/2018
		ED PUPIL COUNT
\$ 1,671,383.00	\$ 1,671,383.00	

TOTAL GRANT AMOUNT - COE	FUND 820 (NW SELPA share only)	\$	-
TOTAL GRANT AMOUNT - CHARTERS	FUND 882	\$	17,480.00
TOTAL GRANT AMOUNT - DISTRICTS	FUND 100	\$	1,340,107.00
<b>TOTAL GRANT AMOUNT - NW SELPA</b>		<b>\$</b>	<b>1,357,587.00</b>

(313,796.00)

## Updated 10/21/2019

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*Lifted from September 13, 2011 letter from the office of Fred Balcom, Director Special Education Division*

#### **ASSEMBLY BILL 114: RELATED SERVICES UNDER THE INDIVIDUALS WITH DISABILITIES EDUCATION ACT**

With the changes to state statute outlined in Assembly Bill 114 (Chapter 43, Statutes of 2011), which relieved county mental health agencies of the responsibility to provide mental health services to students with disabilities, local educational agencies (LEAs) must rely on the Individuals with Disabilities Education Act (IDEA) for guidance on the requirements for providing related services, including those that may have previously been provided by county mental health agencies (CMHAs). Related services under IDEA are defined in Section 300.34 of Title 34 of the *Code of Federal Regulations (CFR)*:

##### **34 CFR 300.34(a)**

Related services means transportation and such developmental, corrective, and other supportive services as are required to assist a child with a disability to benefit from special education, and includes speech-language pathology and audiology services, interpreting services, psychological services, physical and occupational therapy, recreation, including therapeutic recreation, early identification and assessment of disabilities in children, counseling services, including rehabilitation counseling, orientation and mobility services, and medical services for diagnostic or evaluation purposes. Related services also include school health services and school nurse services, social work services in schools, and parent counseling and training.

Section 300.34 of Title 34 of the *CFR* further defines individual related services terms. The following list represents some of the services that may be appropriate when addressing the emotional and behavioral needs of students with disabilities (refer to 34 *CFR* Section 300.34 for the complete list of individual related services terms):

##### **Counseling Services (34 CFR 300.34(c)(2))**

Counseling services means services provided by qualified social workers, psychologists, guidance counselors, or other qualified personnel.

##### **Parent Counseling and Training (34 CFR 300.34(c)(8))**

- (i) Parent counseling and training means assisting parents in understanding the special needs of their child;
- (ii) Providing parents with information about child development; and
- (iii) Helping parents to acquire the necessary skills that will allow them to support the implementation of their child's individualized education program (IEP) or individualized family service plan (IFSP).

##### **Psychological Services (34 CFR 300.34(c)(10))**

Psychological services includes:

- (i) Administering psychological and educational tests, and other assessment procedures;
- (ii) Interpreting assessment results;
- (iii) Obtaining, integrating, and interpreting information about child behavior and conditions relating to learning;
- (iv) Consulting with other staff members in planning school programs to meet the special educational needs of children as indicated by psychological tests, interviews, direct observation, and behavioral evaluations;
- (v) Planning and managing a program of psychological services, including psychological counseling for children and parents; and
- (vi) Assisting in developing positive behavioral intervention strategies.

##### **Social Work Services in Schools (34 CFR 300.34(c)(14))**

Social work services in schools includes:

- (i) Preparing a social or developmental history on a child with a disability;
- (ii) Group and individual counseling with the child and family;
- (iii) Working in partnership with parents and others on those problems in a child's living situation (home, school, and community) that affect the child's adjustment in school;
- (iv) Mobilizing school and community resources to enable the child to learn as effectively as possible in his or her educational program; and
- (v) Assisting in developing positive behavioral intervention strategies.

Residential Placement is not listed as a related service in Section 300.34 of Title 34 of the *CFR*. However, residential placement is addressed elsewhere in the IDEA:

##### **Residential Placement (34 CFR 300.104)**

If placement in a public or private residential program is necessary to provide special education and related services to a child with a disability, the program, including non-medical care and room and board, must be at no cost to the parents of the child.

In addition, the list of related services in the IDEA is not exhaustive or finite. The IEP team must decide what related services are necessary to

provide a free appropriate public education (FAPE) to each student with a disability. The federal Office of Special Education Programs (OSEP) provides further guidance in the "Analysis of Comments and Changes" section of the final IDEA regulations, pertaining to Section 300.34 (excerpt below):

#### **Comment**

We received numerous requests to revise § 300.34 to add specific services in the definition of related services. A few commenters recommended including marriage and family therapy. One commenter recommended adding nutrition therapy and another commenter recommended adding recreation therapy. A significant number of commenters recommended adding art, music, and dance therapy. One commenter recommended adding services to ensure that medical devices, such as those used for breathing, nutrition, and other bodily functions, are working properly. One commenter requested adding programming and training for parents and staff as a related service. A few commenters requested clarification on whether auditory training and aural habilitation are related services. One commenter asked whether hippotherapy should be included as a related service. Other commenters recommended adding language in the regulations stating that the list of related services is not exhaustive. A few commenters asked whether a service is prohibited if it is not listed in the definition of **related services**.

#### **Discussion (Response from OSEP)**

Section 300.34(a) and Section 602(26) of the Act state that related services include other supportive services that are required to assist a child with a disability to benefit from special education. We believe this clearly conveys that the list of services in § 300.34 is not exhaustive and may include other developmental, corrective, or supportive services if they are required to assist a child with a disability to benefit from special education. It would be impractical to list every service that could be a related service, and therefore, no additional language will be added to the regulations.

Consistent with §§ 300.320 through 300.328, each child's IEP team, which includes the child's parent along with school officials, determines the instruction and services that are needed for an individual child to receive FAPE. In all cases concerning related services, the IEP team's determination about appropriate services must be reflected in the child's IEP, and those listed services must be provided in accordance with the IEP at public expense and at no cost to the parents. Nothing in the Act or in the definition of related services requires the provision of a related service to a child unless the child's IEP team has determined that the related service is required in order for the child to benefit from special education and has included that service in the child's IEP.

A child is eligible for special education and related services if they are evaluated in accordance with state and federal law and it is determined the child meets the definition of a "child with a disability," pursuant to Section 300.8 of Title 34 of the *CFR* and/or the definition of an "individual with exceptional needs," pursuant to Section 56026 of the *California Education Code*. To the extent that the IEP team determines that a child with a disability needs a related service to address a mental health need in order to benefit from special education, the service should be provided in accordance with the IEP. There has been some confusion regarding whether or not a student with a disability must meet the criteria for an "emotional disturbance," pursuant to Section 300.8(c)(4) of Title 34 of the *CFR*, before he/she is eligible for mental health services as part of his/her IEP<sup>1</sup>. Though mental health needs may be a significant consideration when developing an IEP for a child who meets the criteria for an "emotional disturbance," eligibility for related services is not contingent on a particular disabling condition and should be determined based on an assessment that reveals an individualized need for the service. Similarly, a mental health diagnosis or designation as "seriously emotionally disturbed," pursuant to Section 5600.3(a)(2) of the *Welfare and Institutions Code*, does not automatically indicate eligibility for special education and related services.

If you have any questions regarding this subject, please contact the Policy and Program Services Unit of the Special Education Division by phone at 916-323-2409.

Sincerely,

*Original signed by Fred Balcom. Hard copy of the signed document is available by contacting the Special Education Division's Director's Office at 916-445-4602.*

Fred Balcom, Director  
Special Education Division

FB:sw

#### **Footnotes**

<sup>1</sup> 34 *CFR* § 300.8(c)(4)(i) **Emotional disturbance** means a condition exhibiting one or more of the following characteristics over a long period of time and to a marked degree that adversely affects a child's educational performance:

(A) An inability to learn that cannot be explained by intellectual, sensory, or health factors.

(B) An inability to build or maintain satisfactory interpersonal relationships with peers and teachers.

(C) Inappropriate types of behavior or feelings under normal circumstances.

(D) A general pervasive mood of unhappiness or depression.

(E) A tendency to develop physical symptoms or fears associated with personal or school problems. (ii) Emotional disturbance includes schizophrenia. The term does not apply to children who are socially maladjusted, unless it is determined that they have an emotional disturbance under paragraph (c)(4)(i) of this section.



*Lifted from January 5, 2012 letter from the office of Fred Balcom, Director Special Education Division*

## **ASSEMBLY BILL 114: USE OF MENTAL HEALTH FUNDS IN THE BUDGET ACT OF 2011–12**

The purpose of this letter is to provide background and guidance regarding the use of funds authorized in the Budget Act of 2011–12 restricting the use of certain funds to “educationally related mental health services.”

### **General Funds**

Pursuant to Assembly Bill (AB) 114, Section 54 (Chapter 43, Statutes of 2011), and provisions 18 and 26 of Item 6110 161-0001 of the Budget Act of 2011–12 funds must be used for:

... educationally related mental health services, including out-of-home residential services for emotionally disturbed pupils, required by an individualized education program pursuant to the federal Individuals with Disabilities Education Act (IDEA) of 2004 (20 U.S.C. Sec. 1400 et seq.) and as described in Section 56363 of the California *Education Code (EC)*. The State Superintendent of Public Instruction shall allocate these funds to special education local plan areas in the 2011–12 fiscal year based upon an equal rate per pupil using the methodology specified in Section 56836.07 of the *EC*.

These provisions have been assigned Resource Code 6512, which differentiates these funds from Resource Code 6500, special education general fund programs. These funds shall be exclusively available for these services only for fiscal year (FY) 2011–12 and FY 2012–13.

### **Federal Funds**

Pursuant to AB 114, Section 54 (Chapter 43, Statutes of 2011), provision 9 of Item 6110 161 0890 of the Budget Act of 2011–12, funds shall be available only for the purpose of providing:

... educationally related mental health services, including out-of-home residential services for emotionally disturbed pupils, required by an individualized education program pursuant to the federal IDEA of 2004 (20 U.S.C. Sec. 1400 et seq.) and as described in Section 56363 of the *EC*.

These funds were allocated to special education local plan areas (SELPAs) on a one-time basis in the 2011–12 fiscal year using data available from the California Special Education Management Information System (CASEMIS) as of December 1, 2010. If funds are appropriated for the purpose of providing the educationally related mental health services for the 2012–13 fiscal year, they will be allocated based on an equal rate per pupil using a methodology specified in Section 56836.07 of the *EC* and using average daily attendance for the 2011–12 fiscal year.

### **Definition of Educationally Related Mental Health Services**

As noted in the provisions above, educationally related mental health services are described in 30 *EC* Section 56363. Section 56363 defines the term “designated instruction and services” to mean “related services” as that term is defined in Section 1401(26) of Title 20 of the *United States Code* and Section 300.34 of Title 34 of the *Code of Federal Regulations (CFR)*.

Related services under IDEA are defined in Section 300.34 of Title 34 of the *CFR*:

Related services means transportation and such developmental, corrective, and other supportive services as are required to assist a child with a disability to benefit from special education, and includes speech-language pathology and audiology services, interpreting services, psychological services, physical and occupational therapy, recreation, including therapeutic recreation, early identification and assessment of disabilities in children, counseling services, including rehabilitation counseling, orientation and mobility services, and medical services for diagnostic or evaluation purposes. Related services also include school health services and school nurse services, social work services in schools, and parent counseling and training. (34 *CFR* 300.34(a))

Section 300.34 of Title 34 of the *CFR* further defines individual related services terms. The following list represents some of the services that may be appropriate when addressing the emotional and behavioral needs of students with disabilities:

- Counseling services (34 *CFR* 300.34(c)(2)) and California *EC* 56363(b)(9)

- Parent counseling and training (34 *CFR* 300.34(c)(8)) and California *EC* 56363(b)(11)
- Psychological services (34 *CFR* 300.34(c)(10)) and California *EC* 56363(b)(10)
- Social work services in schools (34 *CFR* 300.34(c)(14)) and California *EC* 56363(b)(13)

Refer to 34 *CFR* Section 300.34 for the complete list of individual related services terms. Residential placement is not listed as a related service in Section 300.34 of Title 34 of the *CFR*. However, residential placement is addressed elsewhere in the IDEA:

If placement in a public or private residential program is necessary to provide special education and related services to a child with a disability, the program, including non medical care and room and board, must be at no cost to the parents of the child (34 *CFR* 300.104).

In addition, the list of related services in the IDEA is not exhaustive or finite. The individualized education program (IEP) team must decide what related services are necessary to provide a free appropriate public education (FAPE) to each student with a disability.

To maintain clear and understandable terminology based upon existing statute, the California Department of Education (CDE) will be using the term “related services for students who have emotional and behavioral needs” in place of “educationally related mental health services.”

## **Frequently Asked Questions**

### **What limitations are on the use of state and federal funds provided in the Budget Act of 2011–12 for educationally related mental health services?**

The legislature was clear that these funds are targeted for related services and that the funds are made available to local educational agencies (LEAs) to provide services formerly provided by the County Mental Health agencies and the Department of Social Services. The funds **cannot** be spent on educational services that have historically been provided by LEAs for students with emotional or behavioral needs.

### **What are allowable uses of the state and federal funds due to the term “educationally related mental health services”?**

These funds may be used for:

The salaries of certificated supervisors and administrators; and clerical, technical, and office staff salaries associated with administering related services for students with emotional or behavioral needs.

The room and board cost of residential placement if it is included in the student’s IEP.

Professional and consulting service (e.g., case management, medical services, day treatment, individual therapy, family therapy, group therapy, group rehabilitation, therapeutic behavior services, assessment, psychological services, and residential placement) costs for students with emotional or behavioral needs.

Rental and/or lease of office space to provide professional and consulting services for students with emotional or behavioral needs.

Transportation costs of student to receive related services from a provider.

Books and supplies related to providing related services.

If you have any questions regarding this subject, please contact Chris Essman, Education Programs Consultant, Special Education Division, by phone at 916-327-3507 or by e-mail at [cessman@cde.ca.gov](mailto:cessman@cde.ca.gov).

Sincerely,

*Original signed by Fred Balcom. Hard copy of the signed document is available by contacting the Special Education Division's Director's Office at 916-445-4602.*

Fred Balcom, Director  
Special Education Division

FB:rb

**APPENDIX I**  
**SELPA ADMINISTRATIVE UNIT**

1. SELPA AU Budget
2. SELPA Staff Development Budget
3. Low Incidence Equipment Revenue and Low Incidence Services

## SUMMARY BUDGET - SELPA AU

### 2019-20 PROPOSED SELPA ADMINISTRATIVE UNIT BUDGET

OBJECT	DESCRIPTION	2019-20 PROPOSED BUDGET
8000	TOTAL REVENUE	1,145,785
9000	BEGINNING FUND BALANCE	-
	TOTAL REVENUE AND BEGINNING FUND BALANCE	1,145,785
1000	TOTAL CERTIFICATED SALARIES	186,196
2000	TOTAL CLASSIFIED SALARIES	396,217
3000	BENEFITS	212,885
4000	MATERIALS & SUPPLIES	11,471
5000	SERVICES & OTHER OPERATING EXPENSE	244,410
6000	CAPITAL OUTLAY	-
7000	INDIRECT CHARGE	94,606
	TOTAL EXPENDITURES	1,145,785
	ENDING FUND BALANCE	-

*\*Note: 2018-19 ending fund balance was not factored in 2019-20 Proposed Budget beginning balance.*

### 2019-20 PROPOSED SELPA ADMINISTRATIVE UNIT BUDGET - STAFF DEVELOPMENT

OBJECT	DESCRIPTION	2019-20 PROPOSED BUDGET
8000	TOTAL REVENUE	8,000
9000	BEGINNING FUND BALANCE	-
	TOTAL REVENUE AND BEGINNING FUND BALANCE	8,000
1000	TOTAL CERTIFICATED SALARIES	-
2000	TOTAL CLASSIFIED SALARIES	-
3000	BENEFITS	-
4000	MATERIALS & SUPPLIES	-
5000	SERVICES & OTHER OPERATING EXPENSE	7,339
6000	CAPITAL OUTLAY	-
7000	INDIRECT CHARGE	661
	TOTAL EXPENDITURES	8,000
	ENDING FUND BALANCE	-

*\*Note: 2018-19 ending fund balance was not factored in 2019-20 Proposed Budget beginning balance.*



# 2019-20 \*ESTIMATED\* LOW INCIDENCE FUNDING

3/28/2019



		(A)	(D)=(A) x (C)	(E)=(A) x \$430.00000	(F)=(D)+(E)	(G)=(F-J) x 9%	(J)	(K)=(H)-(J)
COST CENTER	DEC 2018 PUPIL COUNT	LI PUPIL COUNT PY DEC 2018 (1ST& 2ND) DISABILITIES - DOR	CARRYOVER FROM 2018-19	2019-20 LOW INCIDENCE PER FUNDING CERT	2019-20 LOW INCIDENCE AVAILABLE	LESS: 9% INDIRECT CHARGES	RESERVED FOR LI CTE	2019-20 LOW INCIDENCE (BEG BALANCE EXC CARRYOVER & INDIRECT)
		BY DISTRICT OF SERVICE (DOS) PUPIL COUNT TO DISTRICTS, BALANCE (DIFFERENCE) TO COE						
	<b>SELPA 1</b>							
322121	COE	5		2,150.00	2,150.00	177.52		1,972
322120	OTHER DISTRICTS	155		66,650.00	66,650.00	5,503.21		61,147
	<b>SELPA 1 - TOTALS</b>	<b>160</b>	<b>-</b>	<b>68,800.00</b>	<b>68,800.00</b>	<b>5,680.73</b>	<b>-</b>	<b>63,119</b>
	<b>SELPA 2</b>							
322221	COE	35		15,050.00	15,050.00	1,242.66		13,807
322220	OTHER DISTRICTS	128		55,040.00	55,040.00	4,544.59		50,495
	<b>SELPA 2 - TOTALS</b>	<b>163</b>	<b>-</b>	<b>70,090.00</b>	<b>70,090.00</b>	<b>5,787.25</b>	<b>-</b>	<b>64,303</b>
	<b>SELPA 3</b>							
322321	COE	111		47,730.00	47,730.00	2,923.68	12,321.00	32,485
322320	CAMBRIAN	13		5,590.00	5,590.00	461.56		5,128
322322	CAMPBELL ESD	28		12,040.00	12,040.00	994.13		11,046
322323	CAMPBELL HSD	22		9,460.00	9,460.00	781.10		8,679
322324	LAKESIDE	-		-	-	-		-
322325	LOMA PRIETA	1		430.00	430.00	35.50		394
322326	LOS GATOS ESD	5		2,150.00	2,150.00	177.52		1,972
322327	LG-SARATOGA	16		6,880.00	6,880.00	568.07		6,312
322328	LUTH BURBANK	-		-	-	-		-
322329	MORELAND	11		4,730.00	4,730.00	390.55		4,339
322330	SARATOGA	6		2,580.00	2,580.00	213.03		2,367
322331	UNION	23		9,890.00	9,890.00	816.61		9,073
	<b>SELPA 3 - TOTALS</b>	<b>236</b>	<b>-</b>	<b>101,480.00</b>	<b>101,480.00</b>	<b>7,361.75</b>	<b>12,321.00</b>	<b>81,797</b>
	<b>SELPA 4</b>							
322421	COE	95		40,850.00	40,850.00	3,372.94		37,477
322420	OTHER DISTRICTS	91		39,130.00	39,130.00	2,441.06	9,566.00	27,123
	<b>SELPA 4 - TOTALS</b>	<b>186</b>	<b>-</b>	<b>79,980.00</b>	<b>79,980.00</b>	<b>5,814.00</b>	<b>9,566.00</b>	<b>\$</b>
	<b>SE SELPA</b>							
322520	COE		95,000	-	95,000.00	7,844.04		87,156
	OTHER DISTRICTS			-	-	-		-
	<b>SE SELPA - TOTALS</b>	<b>-</b>	<b>95,000</b>	<b>-</b>	<b>95,000.00</b>	<b>7,844.04</b>	<b>-</b>	<b>87,156</b>
	<b>SELPA 7</b>							
322721	COE	3		1,290.00	1,290.00	106.51		1,183
322720	OTHER DISTRICTS	129		55,470.00	55,470.00	4,580.09		50,890
	<b>SELPA 7 - TOTALS</b>	<b>132</b>	<b>-</b>	<b>56,760.00</b>	<b>56,760.00</b>	<b>5,514.06</b>	<b>-</b>	<b>52,073</b>
	<b>TOTALS - NW &amp; SE</b>	<b>877</b>	<b>95,000</b>	<b>377,110</b>	<b>472,110</b>	<b>38,002</b>	<b>21,887</b>	<b>#VALUE!</b>

433,128

Total - All NW

SELPA DISTRICTS

Total - All NW COE

628

-

270,040

270,040

21,507

9,566

238,967

249

-

107,070

107,070

7,823

12,321

86,926

Per Pupil Award: 2019-20 State SELPA

Estimate

\$430.0000000000



## APPENDIX J

### SELPA II REGIONAL COST SHARING

SELPA II Regional Program Deficit Bill-backs:

Districts in SELPA II have agreed that certain, designated costs for Regional Program Services, specifically: Program Specialists, Occupational Therapists, SELPA E.D. Program (*Family and Children's Services contracts*), VI Specialist and the Comprehensive Autism Supervisors, shall be shared by all districts in the SELPA. These program costs are first offset by any regional revenue (Program Specialist revenue, NPS Pilot Program revenue, and shared base year OT revenue). The balance of the cost is shared by districts based on total K-12 ADA. The sharing of these costs appear on the SELPA II Revenue Projection Spreadsheets as line item adjustments to each district's apportionment.

~~Small District Impaction, (protection for Montebello) against extraordinarily high special education costs was added to the Regional Program Deficit cost sharing in 2004/2005. Any excess of expenditures over revenue in special education, minus Montebello's special education reserve will be shared among all districts in SELPA II, by total K-12 ADA.~~

**Beginning in 2006/2007**, SELPA II Executive Council approved an additional Program Specialist Position to be cost-shared. This position will be a Transition Specialist, and will be partially funded with Workability Funds. ~~The Program Specialist Position with emphasis on Autism will be a 50% Cupertino responsibility for supporting the Autism population and 50% shared by all 4 districts in SELPA II.~~ In 2007/2008 there will be an additional Vision Specialist (making 2 Vision Specialists and one aide).

**In 2007/2008**, the CHC mental health contract for *Behavior Specialists* (for the SELPA E.D. program) is shared as follows: Shared among all districts in SELPA II (\$385,632), Cupertino-only (\$92,879), FUHSD-only (\$82,256), and Sunnyvale-only (\$30,960).

**In 2008/2009** the CHC contract (\$493,536) will be totally cost shared.

**In 2008/2009**, Augmentative and Alternative Communication Services contract with ACTS, of approx. \$71,280 for the year, will be added to the Regional Program Cost Share to support other SLPs to conduct assessments for Alternative and Augmentative Communication.

**In 2009/2010**, the Behavior Specialist and Behavior Specialist Supervisor costs will transfer from Fremont (CHC contract) to Sunnyvale (district employees): Supervisor = 1.0 FTE and Behavior Specialists = 6 FTE. Also, adding 1.0 FTE O&M hired by Cupertino, and decrease Program Specialist to 2.8 hired by Fremont.

**In 2010/2011**, two additional IAs for the VI program (approx \$100,000), and remove AAC from Cost-Sharing. There will be a small decrease in OT costs as some positions go to 10 months from 11 months. For VI/HOH/O&M: cost-sharing will include salaries, benefits, mileage. CAP cost-sharing will include salaries and benefits for supervisors.

No changes were noted to Regional Program Cost-Sharing **for 2011/2012**.

**2012/2013**: SELPA II Executive Council approved on 05/18/2012 a correction to the Regional Program Cost Sharing to include sharing the costs for the updated computers (\$3,000 one-time) for each of the VI and OM teachers and for \$1,500 (\$500 each) for materials each year, beginning in 2011/2012. At the same meeting Executive Council approved the addition of .75 FTE Braille Transcriber/Media Specialist to the Regional Program Cost Sharing, to be shared by usage. And Executive Council also approved the

addition of 1.0 FTE Teacher of the Visually Impaired/Orientation & Mobility Specialist for the 2012/2013 school year.

**2013/2014:** the Program Specialist Secretary position will be eliminated in the Cost-Share. Executive Council approved \$2,000.00 for the technology needs of the VI Program, the addition of 1.0 FTE Para-educator for the VI Program, a \$10,000 increase in salary for one CAP Supervisor in Cupertino Union School District, and an increase in hours equal to \$10,000 for one CAP Supervisor in Sunnyvale School District, and approved the Family and Children's Services Contract for the 2013-14 school year.

**2014/2015 and 2015/2016:** No changes

**2016-17:** No changes (05/20/16)

**2017-18:** SELPA II Executive Council approved to add \$2,000 budget for Community Advisory Committee (CAC) in the Regional Program Cost Sharing, to be initially paid by Fremont UHSD, in the SELPA II Regional Cost Sharing. (05/19/17)

**2018-19:** SELPA II Executive Council approved the clarification on distribution of Federal Mental Health Funds (05/16/18):

As part of the cost sharing arrangement, SELPA II agreed to pass Federal Mental Health Funds through to Fremont UHSD, and Fremont UHSD agreed to manage the Therapeutic Services Contract with an agreed-upon NPA to support the TSDC programs.

**2019-20:** SELPA II Executive Council approved to add the following in the Regional Program Cost Sharing (05/17/19):

- 0.40 FTE Occupational Therapist (OT) Lead and other OT costs, including protocols and test kits, to be initially paid by Sunnyvale
- 2.0 FTE Behavior Specialists, to be initially paid by Fremont UHSD



