

California Association of Health and Education Linked Professions
Joint Powers Authority (CAHELP JPA)
GOVERNANCE COUNCIL MEETING
February 5, 2021 -2:00 p.m. Virtual Via Teleconference
Desert Mountain Educational Service Center, 17800 Highway 18, Apple Valley, California 92307

AGENDA

NOTICE: This meeting will be held virtually only. If members of the public wish to participate in the meeting and/or make public comment, please follow the instructions below to participate telephonically:

PARTICIPATE BY PHONE:

Dial Access Number: 1-415-655-0003

When prompted - enter Access Code: 177 531 6436

Follow directions as a Participant; an Attendee I.D. is not required to participate.

If you wish to make a public comment at this meeting, prior to the meeting please submit a request to address the CAHELP Governance Council to the recording secretary via fax at 1-760-242-5363 or email jamie.adkins@cahelp.org. Please include your name, contact information and which item you want to address.

Reasonable Accommodation: if you wish to request reasonable accommodation to participate in the meeting telephonically, please contact the recording secretary (via contact information noted above) at least 48 hours prior to the meeting.

1.0 CALL TO ORDER

2.0 PUBLIC PARTICIPATION

Citizens are encouraged to participate in the deliberation of the CAHELP JPA Governance Council. Several opportunities are available during the meeting for the Council to receive oral communication regarding the presentations of any items listed on the agenda. Please ask for recognition either before a presentation or after the presentation has been completed. Please complete and submit a “Registration Card to Address the Governance Council” to the Recording Secretary and adhere to the provisions described therein.

3.0 ADOPTION OF THE AGENDA

3.1 **BE IT RESOLVED** that the February 5, 2021 CAHELP JPA Governance Council Meeting Agenda be approved as presented.

4.0 INFORMATION / ACTION

4.1 Small District Adjustment (**ACTION**)

Jenae Holtz will propose a consideration for the Desert/Mountain SELPA small district protection to be increased to districts less than 2501 Average Daily Attendance (ADA). This proposal provides protection to our districts without increasing contributions from our larger districts. This item is attached the next item and would only be valid if item 4.2 stays at the current or increased level of funding.

AGENDA

4.1.1 **BE IT RESOLVED** that the that the Small District Adjustment be approved as presented.

4.2 Allocation of Low Incidence Funds for Low Incidence Itinerant Services (**ACTION**)

Jenae Holtz will propose the use of increased low incidence funds to cover costs for LEAs in the Desert/Mountain SELPA for Low Incidence Itinerant Services. These funds will offset the increase in the small districts and provide LEAs with additional funding.

4.2.1 **BE IT RESOLVED** that the allocation of low incidence funds for low incidence itinerant services be approved as presented.

5.0 CONSENT ITEMS

It is recommended that the Governance Council consider approving several Agenda items as a Consent list. Consent Items are routine in nature and can be enacted in one motion without further discussion. Consent items may be called up by any Council Member at the meeting for clarification, discussion, or change.

5.1 **BE IT RESOLVED** that the following Consent Items be approved as presented:

5.1.1 Approve the September 18, 2020 CAHELP JPA Governance Council Meeting Minutes.

5.1.2 Approve the Revised 2020-21 CAHELP JPA Governance Council Schedule of Meetings.

5.1.3 Approve Tools to Grow Software annual membership for Crystal Aden, Michael Brooksby, Marisa DiDonato, Patricia Gonzales, Tonia Griffin, Wendy Guilbert-Neal, Karen Lindquist, Jessica Marfia, Janet Ray, Meghan Stevens, and Lisa Sutton in the amount of \$459.00.

5.1.4 Approve the 2020-21 Crisis Prevention Institute (CPI) Annual Membership for Cheryl Goldberg-Diaz and Cecilia Holguin in an amount not to exceed \$150.00 per individual membership.

5.1.5 Approve 2021 Theraplay Certification Renewals for Rosalina Becerra, Julie McNeil, and Janice Titherley at \$50.00 each and a combined total of \$150.00.

AGENDA

- 5.1.6 Approve the 2021/2022 two-year International Critical Incident Stress Foundation (ICISF) memberships for Kenia Aguilar, Brian Follis, and Robin McMullen in the amount of \$95.00 per individual membership.

6.0 CHIEF EXECUTIVE OFFICER AND STAFF REPORTS

6.1 Special Education Funding Study

Jenae Holtz will share information regarding a current study taking place for special education funding. This information includes stakeholder input to the subject.

6.2 Spirit River Complex

Jenae Holtz will provide information regarding CAHELP contracting with a security company for 30 days to assist with evaluating the need and level of ongoing security at the Spirit River Complex.

6.3 Hesperia Property

Jenae Holtz will lead a discussion regarding the pros and cons of retaining the Hesperia property.

6.4 Desert/Mountain SELPA and Charter SELPA Local Plan Revise-Board Signatures

Jenae Holtz will provide update on Desert/Mountain SELPA and Charter SELPA Local Plan Revise-Board Signatures.

6.5 Compliance Update

Jenae Holtz will provide information regarding the latest Mega Letter regarding compliance issues from the California Department of Education.

7.0 INFORMATION ITEMS

7.1 Resolution Support Services Summary

7.2 Professional Learning Summary

8.0 GOVERNANCE COUNCIL MEMBERS COMMENTS / REPORTS

9.0 CEO COMMENTS

10.0 MATTERS BROUGHT BY CITIZENS

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AGENDA

This is the time during the agenda when the CAHELP JPA Governance Council is again prepared to receive the comments of the public regarding items on this agenda or any school related special education issue.

When coming to the podium, citizens are requested to give their name and limit their remarks to five minutes.

Persons wishing to make complaints against CAHELP JPA Governance Council personnel must have filed an appropriate complaint form prior to the meeting.

When the CAHELP JPA Governance Council goes into Closed Session, there will be no further opportunity for citizens to address the Council on items under consideration.

11.0 ADJOURNMENT

The next regular meeting of the CAHELP JPA Governance Council will be held on Friday, March 26, 2021, at 10:00 a.m., at the Desert Mountain Educational Service Center, Aster/Cactus Room, 17800 Highway 18, Apple Valley, CA 92307.

Individuals requiring special accommodations for disabilities are requested to contact Jamie Adkins at (760) 955-3555, at least seven days prior to the date of this meeting.



Chapter 24: Fiscal Allocation Plan

SECTION A: BACKGROUND

SECTION B: MEETING THE CHALLENGE

SECTION C: REVENUES INCLUDED IN THE STATE AB 602 MODEL

SECTION D: REVENUES EXCLUDED FROM THE STATE AB 602 MODEL

SECTION E: COMPONENTS OF THE STATE AB602 EXHIBITS

SECTION F: ADA DEFINED FOR AB 602 PURPOSES

SECTION G: BASE ALLOCATION PRINCIPLES

SECTION H: REGIONAL PROGRAMS

SECTION I: FEE FOR SERVICE

SECTION J: CHARTER SCHOOLS

SECTION K: SMALL DISTRICT PROTECTION

SECTION L: X-POT INSURANCE FUND CONTRIBUTION

SECTION M: X-POT REVENUE TRANSFER

SECTION N: APPORTIONMENT DISTRIBUTION

SECTION O: ACCOUNT CODES

SECTION P: REGIONAL FACILITIES ACQUISITION TRANSFER

SECTION Q: REGIONAL FACILITY ACQUISITION PROCESS

Section A – AB 602 Background: A Change in the Way We Fund Special Education

In 1997, in response to the statewide need for a less complex and more equitable funding model for special education, AB 602 legislation was passed in the State of California. The “base year” for the new funding model was 1997/98. Essentially, the State moved from a unit-based funding model which relied upon the number of identified special education students, to a per ADA model, which created placement neutral funding for special education. Special Education Local Plan Areas (SELPA) were no longer funded based on the number of special education students within their member districts, but rather funded in line with the K-12 population of their districts. In addition to the per ADA rate, this legislation initially provided funding for COLA, growth, equalization (enabling low-funded SELPAs to be leveled up to the statewide average), and “high need” students (special disabilities adjustment).

For Desert/Mountain SELPA, like any other multi-agency SELPA, this model represented a major change in doing business. Previously, special education funding was allocated directly to each district and county office based on the Instructional Personnel Service (IPS) units that agency was allocated and operated. Per AB 602, funding is now calculated for the SELPA as a whole, and it is the SELPA’s responsibility to allocate funding among its member agencies based upon an allocation procedure approved by the SELPA Board of Directors.

The model developed at that time also included federal local assistance funds as part of the AB 602 funding formula. A statewide target rate (STR) for per ADA funding was established. For FY 2012/13 that amount was \$465.4404354505. This combined with federal local assistance funds brought most SELPAs to a per ADA average of about \$650. However, with federal local assistance funds disbursed one year in arrears, and with growth ADA being paid at the STR, an ever-widening gap was created for SELPAs that experience ADA growth each year.

In 2013, the Governor’s budget addressed this anomaly by separating federal funding from the AB 602 formula. State special education funding continues to be based on ADA. However, federal local assistance funds are allocated outside of the AB 602 formula.

Section B – Meeting the Challenge

The Desert/Mountain SELPA Board of Directors chose to be proactive in meeting the challenge of AB 602. A SELPA Funding Allocation Plan was developed using the following guidelines.

- Provide an incentive for developing and implementing cost-effective programs for special education students in public school programs;
- Provide no incentive for districts to over-identify students for special education services;
- Have a phase-in plan to hold districts at the 1997-98 level of funding for unit rates and support service ratios (at least) for the first year of implementation;

- Equalize per ADA funding among districts over time by leveling up;
- Acknowledge that the AB 602 Funding Allocation Model will not cover the total costs of special education services;
- Recognize that districts have been, and will need to continue, contributing revenue limit dollars earned by special education pupils and general fund contributions to cover special education costs, and;
- Keep program requirements in mind.

Section C – Revenues Included in the State AB 602 Model

1997/98 revenues that were included in a SELPA’s base include:

- Deficit State Aid for special education for both the ages 5-21 programs and the preschool programs (ages 3-5). These include revenue for IPSUs (units), support services (SSR), extended year, and non-LCH/FFH nonpublic school/agency placements;
- Federal Aid for the age 5-21 programs (PL 94-142 Local Assistance Entitlements);
- Property Tax for special education (excluding property tax for infant programs);
- 97/98 Equalization revenue at the funded level;
- Revenue for units transferred to another SELPA for regular year only;
- County Schools longer day/year funding; and
- County Schools supplemental funding for continuous year juvenile court school programs (effective 2004/05 fiscal year for D/M SELPA due to the opening of a new Juvenile Hall in the high desert region)

In FY 2013/14, Federal Aid (PL 94-142 Local Assistance Entitlement) is funded separately. The base also now includes funds that previously were excluded (i.e., State Aid for Regionalized Services/Program Specialists and funds previously provided for K-12 Staff Development). Additionally, funds for Low Incidence Equipment and Materials and Low Incidence Services have been consolidated into one award.

Section D – Revenues Excluded from the State AB 602 Model

1997/98 revenues that are excluded from a SELPA’s base include:

- Revenue Limits for special education ADA (SDC and NPS);
- J-50 Infant Units;

- Part C Federal Aid for Infants;
- State aid for Low Incidence materials and equipment;
- State aid for Regionalized Services/Program Specialists;
- NPS/NPA funding for pupils in Licensed Children’s’ Institutions/Foster Family Homes (LCI/FFH);
- Revenue for units transferred into a SELPA;
- Federal aid for preschool programs (both the PL 99-457 Federal Preschool entitlement and PL 94-142 Preschool Local Assistance entitlement);
- Federal aid for Low Incidence services; and
- Project Workability and other federally funded programs, including LCI emergency funds.

Although these programs are excluded from the base calculation, SELPAs/LEAs continue to be funded separately for them.

Section E – Components of the State AB 602 Exhibits

The 2013/14 State Exhibits include the following sections:

1. Section A - ADA and rates
2. Section B - Base (E.C. 56836.10)
3. Section C - COLA (E.C. 56836.08(d))
4. Section D - Growth (E.C. 56836.15)
5. Section E - Low Incidence Materials and Equipment and/or Services (E.C. 56836.22)
6. Section F - Out of Home Care (E.C. 56836.165)
7. Section G - Nonpublic Schools (NPS) Extraordinary Cost
8. Section H - Adjustment for Necessary Small SELPA (NSS) with Declining Enrollment
9. Section I - Apportionment Summary

The State Budget Act provides separate budget appropriations for each of these components. As a result of having separate appropriations, if funding of a component is insufficient, a separate deficit factor is calculated for that component.

ADA revenue for school district operations is calculated based upon the Local Control Funding Formula (LCFF) and accrues directly to the district of residence for students served in County programs. In order to properly attribute ADA revenue to the service provider, funds generated by students served in county-operated programs will be transferred from the district of residence to the County Office of Education based on the LCFF formula of the district of residence to include a proportionate share of the district concentration grants.

Revenue for the provision of mandated Regionalized Services/Program Specialists (RS/PS) services will be allocated to the Desert/Mountain SELPA from state revenues (resource 6500) based on a five-year historical percentage of 3.52663% (See Exhibit C).

The various Funding Exhibits for each individual SELPA are available at the following website: <http://www.cde.ca.gov/fg/aa/se/ab602apptdat.asp>

Section F – ADA Defined for AB 602 Purposes

As contained in E.C. 56836.06 and E.C. 41601, the ADA used in the special education funding formula is the SELPA’s **TOTAL** K-12 ADA for all students within the SELPA districts and charter schools (not just special education ADA) from the sources listed below. P-1 ADA will be used at the First Principal Apportionment; P-2 ADA will be used at the Second Principal Apportionment. P-2 ADA, including corrections, and replacements of Annual ADA where indicated in **boldface** below, is used for the Annual Apportionment and any subsequent Annual Apportionment recertifications.

Definition of AB602 K-12 ADA **Fiscal Year 2012-13**

***AB602 ADA – Education Code (E.C.) Sections 41601 and 56836.05**
The Special Education Funding Formula for 2012-13. Annual certifications use each SELPA’s total K-12 ADA from the sources below. ADA associated with ROC/P and Adult Education is not included.*

Attendance COE

COUNTY OFFICES OF EDUCATION	ENTRY FIELDS	PERIOD
County School Tuition Fund	A-1	Annual
Juvenile Hall, Homes and Camps	A-2	Annual
County Group Home and Institution Pupils	A-3	Annual
Community Schools Pupils – Probation referred or on probation or parole, expelled, homeless	A-4 + A-5 + A-6	Annual
Opportunity Schools and Full-day Opportunity Classes	A-7	Annual
Specialized Secondary Schools	A-8	Annual
Technical, Agricultural, and Natural Resource Conservation Schools	A-9	Annual
ADA for students in CalSafe	A-10	Annual
Community Day School Program	A-11 + A-12	Annual

Attendance County Operated Programs COE (credited to County of Attendance)

COUNTY OFFICES OF EDUCATION	ENTRY FIELDS	PERIOD
County Community Schools	A-1	P-2
Special Day Class	A-2	P-2
Special Education Students Extended Year	A-3	Annual
Special Ed – Nonpublic, Nonsectarian Schools	A-4	Annual
Special Ed – Nonpublic, Nonsectarian Schools Extended Year	A-5	Annual
Special Ed – Nonpublic School/Licensed Children’s Institution	A-6	Annual
Special Ed – Nonpublic School/Licensed Children’s Institution Extended Year	A-7	Annual

School Districts

SCHOOL DISTRICT	ENTRY FIELDS
School District of Attendance School District Attendance Supplement (credited to District of Attendance) Basic Aid “Choice”/Court Ordered Voluntary Pupil Transfer (credited to District of Attendance) Basic Aid Open Enrollment (credited to District of Attendance)	A-1 + A-2 + A-3 + A-4

School Districts

SCHOOL DISTRICT	ENTRY FIELDS	PERIOD
Kindergarten through Grade 12	A-5	P-2
Continuation Education	A-6	P-2
Opportunity Schools and Full-Day Opportunity Classes	A-7	P-2
Home and Hospital	A-8	P-2
Special Education – Special Day Class	A-9	P-2
Special Education – Nonpublic, Nonsectarian Schools	A-10	Annual
Special Education – Nonpublic, Nonsectarian Schools/Licensed Children’s Institution	A-11	Annual
Community Day School	A-12 + A-13	Annual

SCHOOL DISTRICT	ENTRY FIELDS	PERIOD
Extended Year ADA	A-14 + A-15 + A-16	Annual

***Charter Schools**

Attendance Charter School Block Grant EHS

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
Regular Elementary and High School	A-1, A-3, A-5, A-7, A-9, A-11, A-13, A-15, A-17, A-19	P-2
Extended Year Special Education Students	A-19	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools [E.C. 563669a)(7)]	A-21, A-23, A-25, A-27, A-29	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools/Licensed Children's Institutions	A-31, A-33, A-35, A-37, A-39	Annual
Special Education – Nonpublic, Nonsectarian Schools/Licensed Children's Institutions	A-41, A-43, A-45, A-47, A-49	Annual
Special Education – Nonpublic, Nonsectarian Schools ADA [E.C. 56366(a)(7)]	A-51, A-53, A-55, A-57, A-59	Annual

Attendance Charter School Block Grant Unified Resident

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
Regular Elementary and High School	A-1 + A-3 + A-5 + A-7 + A-9	P-2
Extended Year Special Education Special Day Class	A-11 + A-13 + A-15 + A-17 + A-19	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools [E.C. 56366(a)(7)]	A-21 + A-23 + A-25 + A-27 + A-29	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools/Licensed Children's Institutions	A-31 + A-33 + A-35 + A-37 + A-39	Annual
Special Education – Nonpublic, Nonsectarian Schools/Licensed Children's Institutions	A-41, A-43, A-45, A-47, A-49	Annual
Special Education – Nonpublic, Nonsectarian Schools ADA [E.C. 56366(a)(7)]	A-51, A-53, A-55, A-57, A-59	Annual

Attendance Charter School Block Grant Unified Non-Resident

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
Regular Elementary and High School	A-63, A-65, A-67, A-69, A-71	P-2
Extended Year Special Education Students	A-73, A-75, A-77, A-79, A-81	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools [E.C. 56366(a)(7)]	A-83, A-85, A-87, A-89, A-91	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools/Licensed Children’s Institution	A-93, A-95, A-97, A-99, A-101	Annual
Special Education – Nonpublic, Nonsectarian Schools ADA [E.C. 56366(a)(7)]	A-113, A-115, A-117, A-119, A-121	Annual

Attendance Charter School Block Grant – SBC

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
Regular Elementary and High School	A-1, A-3, A-5, A-7, A-9, A-11, A-13, A-15, A-17, A-19	P-2
Extended Year Special Education Students	A-19	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools [E.C. 56366(a)(7)]	A-21, A-23, A-25, A-27, A-29	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools/Licensed Children’s Institutions	A-31, A-33, A-35, A-37, A-39	Annual
Special Education – Nonpublic, Nonsectarian Schools/Licensed Children’s Institutions	A-41, A-43, A-45, A-47, A-49	Annual
Special Education – Nonpublic, Nonsectarian Schools ADA [E.C. 56366(a)(7)]	A-51, A-53, A-55, A-57, A-59	Annual

Attendance Charter School Block Grant COE

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
Regular Elementary and High School	A-1 + A-3 + A-5 + A-7 + A-9	P-2
Extended Year Special Education Special Day Class	A-11 + A-13 + A-15 + A-17 + A-19	Annual
Extended Year Special Education, Nonpublic, Nonsectarian Schools [E.C. 56366(a)(7)]	A-21 + A-23 + A-25 + A-27 + A-29	Annual

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
Extended Year Special Education, Nonpublic Nonsectarian Schools/Licensed Children's Institutions	A-31 + A-33 + A-35 + A-37 + A-39	Annual
Special Education – Nonpublic, Nonsectarian Schools ADA [E.C. 56366(a)(7)]	A-51 + A-53 + A-55 + A-57 + A-59	Annual

Attendance Charter School – Revenue Limit

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
Kindergarten through Grade 12 – Resident	A-1 + A-3 + A-5 + A-7 + A-9	P-2
Kindergarten through Grade 12 – Non-Resident	A-25 + A-27 + A-29 + A-31 + A-33	P-2
Special Education – Special Day Class	A-11 + A-35	P-2
Special Education – Nonpublic, Nonsectarian Schools	A-13 + A-15 + A-37 + A-39	Annual
Extended Year ADA	A-17 + A-19 + A-21 + A-41 + A-43 + A-45	Annual

Attendance COE Charter School – Revenue Limit

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
County School Tuition Fund	A-1	Annual
Juvenile Hall, Homes and Camps	A-3	Annual
County Group Home and Institution Pupils	A-5	Annual
Community Schools Pupils – Probation referred or on probation or parole	A-7	Annual
Community Schools Pupils – Expelled	A-9	Annual
Community Schools Pupils – Homeless	A-11	Annual
Opportunity Schools and Full-Day Opportunity Classes	A-13	Annual
Specialized Schools	A-15	Annual
Technical, Agricultural, and Natural Resource Conservation Schools	A-17	Annual
ADA for students in CalSafe	A-19	Annual
Community Day School Program	A-21 + A-23	Annual

Attendance County Operated Charter Schools Program COE

CHARTER SCHOOLS	ENTRY FIELDS	PERIOD
County Community Schools	A-1	P-2
Special Day Class	A-3	P-2
Special Day Class Extended Year	A-5	Annual
Special Education – Nonpublic, Nonsectarian Schools [E.C. 56366(a)(7)]	A-7	Annual
Special Education – Extended Year – Nonpublic, Nonsectarian Schools [E.C. 56366(a)(7)]	A-9	Annual
Special Education – Nonpublic School/Licensed Children’s Institution	A-11	Annual
Special Education – Nonpublic School/Licensed Children’s Institution Extended Year	A-13	Annual

****NOTE: Charter School ADA may be adjusted for a State Board of Education approved funding determination pursuant to Senate Bill 740 (Chapter 892, Statutes of 2001)***

Legend:

AB602: Assembly Bill 602; SELPA: Special Education Local Plan Area; ADA: Average Daily Attendance; ROC/P: Regional Occupational Center/Programs

Prepared by:
 California Department of Education
 School Fiscal Services Division
 June 2013

The following is a summary of the primary features of the Desert/Mountain funding allocation model:

FEATURE	DESCRIPTION/INFORMATION
ADA Based	SELPA-wide ADA will be aggregated and used to calculate the SELPA AB602 apportionment. District ADA will include (1) district generated ADA (see ADA Defined for AB602 Purposes) and, (2) the county ADA generated by students from their district of residence. District ADA will be used to allocate the AB602 apportionment to each district.
Entitlements	All districts will be entitled to a “Base Allocation” that includes growth and/or decline.

FEATURE	DESCRIPTION/INFORMATION
	The first source of funding for special education will be those received by the district/charter in support of education as generated by students with special needs (received directly by each district or charter school as part of the K-12 funds for education). The second source of revenue will be the AB602 apportionment. Each SELPA Member District must spend an equal amount of general fund dollars for students with special needs equivalent to average general fund expenditures for nondisabled students prior to spending any federal IDEA funds (as determined via the “Excess Cost” reporting tool.
Equalization	This model equalizes each SELPA Member’s/District’s per-ADA rate.
Small School District Protection	Funding for Small School Districts, defined as districting having ADA of 1500 or less (currently Baker Valley, Helendale, Needles, and Trona) will be protected at the 1997-98 level subject to adjustments for program transfers and/or at the amount of revenue generated by their current actual ADA calculation (whichever is less).
NPS/NPA Costs	By approval of the SELPA Local Plan, the governing board of each participating member/district authorizes the SELPA to process NPS/NPA contracts and invoices on their behalf. Contract invoices will be paid by the SELPA and billed back to the districts per the Board approved X-Pot procedure.
Due Process/Dispute Resolution Pool	To protect member/districts from the potentially high cost of due process litigation and other expenses approved by the SELPA Board, SELPA member/districts agree to maintain a self-insurance pool (X-Pot) with an annual targeted reserve level of \$500,000.
State Special School Costs	All districts and County Operations will be 100% responsible for State Special School service costs provided for their students. These costs will be reimbursed via the X-Pot per the Board approved X-Pot procedure.
Due Process and NPS Processing Costs	Each district and County Operations will make an X-Pot contribution on a per-pupil basis, based on current year’s December P-1 Pupil Count. The per-pupil contribution rate is recalculated and Board approved each year.

FEATURE	DESCRIPTION/INFORMATION
Regional Services – Students Served Outside District of Residence	<p>“Regional Service Rates” (aka Fee-for-Service) will be established for each placement or type of service provided outside of a student’s district of residence. Based upon the established Regional Service Rates, each district of residence will be charted for the regional services that are provided. For students received duplicate services, the district will be charged for each service separately. The SELPA will calculate these charges for each district based upon duplicated Pupil Counts.</p> <p>Regional Service Rates will be presented to the Board at the time of budget adoption for approval for use in the upcoming fiscal year. Rates may also be added or adjusted during the year with Board approval.</p>
Deficit “Excess” Costs Bill Back Procedure	<p>The need for an Excess Cost Bill Back Procedure to bill districts for excess costs in the County Operated programs, should be eliminated with the establishment of the “Regional Service” fee procedure. In the event, however, that an unexpected deficit is incurred by County Operated programs, an Excess Cost Report will be presented to the SELPA Board for approval.</p>
Dependent Charter School	<p>A Charter School is considered “Dependent” if they have not applied and been accepted into a SELPA as a Local Education Agency (LEA) member. As such, the charter is considered a school of the sponsoring district. Revenue generated/earned by a “dependent” charter is passed to the sponsoring district for distribution per their district policies or MOU between the district and the charter school. A calculation to determine recommended funding levels for each is prepared as delineated in Section J.</p> <p>NOTE: Not all “Directly Funded” charter schools are considered “Independent LEAs” for special education purposes.</p>
Independent Charter School	<p>A Charter School is considered “Independent” if their charter identifies them as a Local Education Agency (LEA); and they have applied for SELPA membership to the SELPA Board of Directors and been accepted as an Independent LEA Charter School. Revenue is paid directly to an Independent Charter School and not passed through to the sponsoring district.</p>

Section G – Base Allocation Principles

- Equitable distribution of special education revenues to all districts is the primary fiscal goal of AB602. To accomplish this purpose, all districts share equally in the allocation and apportionment of AB602 revenues. The SELPA-wide per ADA rates (base, COLA, equalization, growth (if applicable) and other) as reflected on the State AB602 Exhibit (subject to the deficit), along with the federal IDEA funds for age 5-21 programs (PL 94-142 Local Assistance Entitlements), will be used to calculate revenue distributions for all districts. It should be noted that Federal IDEA Local Assistance funds are included in the calculation to establish the “blended” per ADA rate. However, they are distributed to SELPA members/districts based on current year December Pupil Count.
- It is the intent that no district entitlement will be lower than the revenues received for their 1997-98 units from State Aid under the J-50 process. However, this entitlement is subject to adjustment as a result of declining enrollment and/or if special education programs are no longer operated within the district.
- Regionalized Services/Program Specialist (RS/PS) funds will be deducted from the State portion of AB602 funds at an historical average five-year rate of 3.52663% (See Exhibit C) prior to the calculation of district total special education per-ADA rates.
- District total special education per-ADA rates will be recalculated annually. Additional recalculations will follow each CDE certified AB602 Funding Exhibit (P-1, P-2, Annual, Annual R-1, Annual R-2, and Annual R-3).
- The primary source of funding for district special education services is the equitable share of general fund revenues generated by the proportionate amount of time that students with disabilities spend in special education classes.
- AB602 revenue is intended to supplement general fund revenues to cover the excess costs of providing special education services to students with disabilities.

AB 602 Fiscal Allocation Plan

The Desert/Mountain SELPA AB602 Fiscal Allocation plan consists of the following elements:

ADA used for the SELPA Fiscal Allocation Plan is described in the previous section entitled “ADA Defined for AB 602 Purposes” and is based on actual current year SELPA-wide ADA, ADA for students in Regional placements, other than Juvenile Hall, accrues to the student’s district of residence for the SELPA revenue calculations. For students enrolled in Charter Schools, the ‘district of residence’ is regarded as being either the independent LEA charter or the district that authorized the dependent charter. This will be referred to as “***district of residence ADA.***” ADA will be the **Funded** ADA in any given fiscal year. Funded ADA for school districts and independent LEA charter schools is P-2 ADA, with the exception of Nonpublic School and Community Day School, which is Annual (ADA source documents J-18/19, J-18/19B, J-18/19S, and J-18/19CH). Funded ADA for County-operated programs is Annual, with the exception of County Community School and Master Plan Special Day Class, which is P-2 (ADA source documents J-27/28 and J-18/19C Supplement).

1. AB 602 Revenue for district operated programs and LEA Charter Schools will be distributed as follows, to establish the overall rate per ADA, per the model contained in **Exhibit A**:
 - A. **BASE REVENUE**: Total amount per K-12 ADA is distributed equally to LEAs based initially on prior year **district of residence** ADA and subsequently revised at P-1 and P-2 for current year actual;
 - B. **PROPERTY TAX**: Total amount per K-12 ADA is distributed equally to LEAs based initially on prior year **district of residence** ADA. Revised at P-1 and P-2 for current year actual.
 - C. **LOCAL ASSISTANCE (K-12 Part B, Federal IDEA, PL 94-142)**: Total amount per K-12 ADA is distributed equally to LEAs based initially on prior year **district of residence** ADA. Revised at P-1 and P-2 for current year actual. These funds are included to arrive at the per ADA amount of funding for all SELPA member/districts. The amount each entity receives for each grant award period is ultimately distributed based on current year December pupil count and is also subject to federal and state spending requirements.
 - D. **COLA**: Per K-12 ADA distributed equally to LEAs based initially on prior year **district of residence** ADA. Revised at P-1 and P-2 for current year actual.
 - E. **EQUALIZATION (if applicable)**: Per K-12 ADA distributed equally based initially on prior year **district of residence** ADA. Revised at P-1 and P-2.
 - F. **GROWTH**: Per K-12 ADA distributed equally to districts based initially on current year district of residence ADA. Revised at P-1 and P-2 for current year actual.
 - G. **REGIONAL PROGRAMS**: Funded as a revenue deduct expense, based upon the Regional Services fee-for-service schedule, from the **district of residence** per K-12 Apportionment revenue.
 - H. **INDEPENDENT CHARTER SCHOOLS**: Funded based upon the Fee for Service Schedule from those revenues generated by the Charter's K-12 ADA. With the exception of seat-time Independent Charter Schools which are fully funded.
2. For regional program operators (e.g., County programs) the revenue distribution is based on Fee for Service methodology.

(See Exhibit A for AB 602 Revenue Distribution)

Section H – Regional Programs

The “Regional Program” concept has been developed by the Desert/Mountain SELPA to address very specialized student program needs. Regional program funding is determined using the Fee for Service schedule and distributed to Regional Program operators from the AB 602 K-12 revenue after the per ADA distribution to LEAs (i.e., as a revenue deduct to the district of residence).

These programs are designed by the program operator based on requested services, reviewed by the Steering Committee and approved by the Board of Directors. Any LEA may be a Regional Program operator, but must adhere to the approved budget, program design, including staff: student ratio, daily/annual length of operation, curriculum, support systems/support staff, and staff development as prescribed under the Desert/Mountain SELPA Local Plan.

Any Regional Program proposed modification by the program operator must be reported to the Steering Committee and presented to the Board of Directors for approval.

Regional Programs must be reviewed annually by December 15 by the Steering Committee. Any recommended changes in Regional Programs for the next fiscal year (e.g., addition or deletion of classes), shall be presented to the Board of Directors for approval.

Regional Program revenue projections are based on one of two methodologies, with revenue being distributed to Regional Program operators from the SELPA-wide AB 602 K-12 revenue PRIOR TO any per ADA distribution to LEAs (i.e., “off the top”) (NOTE: Regional Programs are funded from Fee for Service revenue for specialized programs based on fees established to fund these programs at 100% of the cost of operation):

- 1) **Existing Regional Programs** approved for the next fiscal year, prior year actuals adjusted by current year COLA and any program design changes (expansion, reduction, etc.);
- 2) **New Regional Programs** will be initially funded based on cost projections, then adjusted to actuals as the year progresses.

All revenue and expenditures for Regional Programs MUST be tracked in a program (management code) separate from any other special education programs.

Regional Program operators must provide Revenue and Expenditure Reports for each program operated to the SELPA Finance Committee, Steering Committee, and Board of Directors identifying the following:

- Prior Year Actuals, including ending balance and FTE;
- Current Year Budget, including beginning balance and FTE;
- Current Year Expenditures, including FTE;
- Current Year Ending Balance

The Revenue and Expenditure Report schedule is as follows:

1st INTERIM, no later than DECEMBER 15 - current year from July 1 – October 31, including revised annual projections

2nd INTERIM, no later than MARCH 15 – current year from July 1 – January 31, including revised annual projections

No later than MARCH 15 – budget for following fiscal year

FINAL, no later than SEPTEMBER 15 – prior year actual from July 1- June 30

Regional Program operators **MUST** report deficits or surpluses to the Finance Committee, Steering Committee, and Board of Directors **as soon as evident**. This report shall include justification for the deficit or surplus. Any modifications to the approved budget shall be reviewed by the Finance and Steering Committees, and presented to the Board of Directors for final approval.

After the close of each fiscal year, Regional Program surpluses or deficits **may be** adjusted to zero (\$0) by the SELPA through the following fiscal year's Annual AB 602 Apportionment cycle. Adjustments shall be made via the same ADA methodology in which the original revenue was generated through the "off the top" model; **or may be** used to reduce the need for increases in the fee for services rates in the following fiscal year.

If an LEA is no longer the program operator, revenue shall be transferred to the new program operator. If the program is discontinued, existing revenue may be used to fund other existing, or new, Regional Programs as recommended by the Finance and Steering Committees, and presented to the Board of Directors for approval. Excess revenue shall be returned to the SELPA member districts via the same ADA methodology under which the Regional Program revenue was generated.

Section I – Fee for Service (FFS)

The Fee for Service mechanism has been developed to provide revenue for students in Regional Program placements (e.g., a Snowline student in an SDC class operated by Hesperia or San Bernardino County). The **Fee for Service Rates** range from the less intense placements/cost to the more intense placements/cost (i.e., from DIS to SH/SDC). The Fee Schedule shall be reviewed annually by the Finance and Steering Committees to determine future year's cost factors. Annually, by March 15, statewide fiscal changes that may impact the current year's Fee Schedule Cost Factors shall be identified and addressed by the Finance and Steering Committees. Recommendations to alter the annual Fee Schedule cost factors shall be submitted to the Board of Directors for approval. *(Refer to the Desert/Mountain SELPA Fee for Service Procedure for the detailed procedure.)*

Section J – Charter Schools

Special Education Funding

Special Education funding is calculated at the SELPA level per AB 602 via the state prepared Special Education Funding Exhibit. The Special Education Exhibit calculates the revenue, generated on a per ADA basis by multiplying the SELPA-wide ADA by the current Statewide Target Rate(s). The funding calculation includes separate rates for Base, COLA, Growth, NPS/NPA and Equalization (if applicable). These rates are combined by the SELPA to form a blended rate and is distributed equally to the member Districts on a per ADA basis.

A. LEA Charter Schools

Special Education funding for LEA Charter School(s) operating “seat time” special education programs shall be the special education revenue generated by the current period Charter ADA according to the base allocation principles of Section G.

Special Education funding for LEA Charter School(s) operating “non-seat-time” special education programs is limited to the lesser of (1) the special education revenue generated by the current period Charter ADA, or (2) the SELPA’s ‘Charter Base plus Fee’ revenue calculation. This revenue calculation is a combination of two components (1) the Base, calculated for the current fiscal year at 18% of the special education revenue generated by the Charter’s total ADA at P-2, plus (2) the SELPA Fee-for-service calculated for all special education services provided by the Charter to students at P-1 and P-2.

This revenue is estimated at P-1 and finalized at P-2. Prior to 2004/05 payments were made at P-1, and P-2 with an annual adjustment. Effective in 2004/05, payments of revenue are made monthly via the purchase order process. Apportionments are distributed on the same apportionment cycle as all other member districts. (*See Apportionment Distribution*). Initial payments for July through January are made based on actual service levels from the prior fiscal year adjusted for the estimated services levels or new programs. Payments for March through June are based on the official P-1 and P-2 ADA reported on the School J18/19 CH report. A revenue adjustment may be made in May and June and again following year-end closing due to any corrections or adjustments in subsequent state certifications of ADA or special education revenues.

B. Dependent Charter Schools (for special education purposes)

The District (who sponsored the dependent charter) is allocated special education revenue based on the total District ADA, including the ADA generated by the dependent Charter School(s). The District shall transfer to the Charter School, for those services provided by the Charter School at the School’s expense, an amount of funding equal to the lesser of either (1) special education revenue generated by the current period Charter ADA, or (2) the SELPA’s ‘Charter Base plus Fee’ revenue calculation. This revenue calculation is a combination of two components; (1) the Base, calculated for the current fiscal year at 18% of the special education revenue generated by the Charter School’s total ADA at P-2, plus; (2) the SELPA Fee-for-service calculated for all special education services provided to students at P-1 and P-2.

- C. This revenue is estimated at P-1 and finalized at P-2. The District receives revenue apportionments throughout the year per the state apportionment schedule. This monthly apportionment includes the portion earned/generated by the dependent Charter School. The revenue may be passed-through from the District to the School. This may be on a monthly, P-1/P-2, annual or any other basis deemed appropriate by both parties and in conformance with SELPA policy. A revenue adjustment may be made following year-end closing for corrections or adjustments to the P-2 ADA.

The School and District agree that the School’s assumption of responsibility for all students with exceptional needs who are enrolled in the charter school constitutes a contribution of an equitable share of the school’s block grant funding as defined in Education Code Section 47646(c). The

School and District further agree that the provision of funding specified within this Article constitutes an equitable share of special education funding and services as defined in Education Code Section 47646(b).

Section K – Small LEA Protection

Funding levels for LEAs with 1500 ADA or less will be supported at the 1997-98 revenue level subject to adjustments for program transfers

As a result of the equalized funding allocation described in the sections above, and the small amount of ADA generated by a small LEA, it is possible that a small LEA's net revenue may be less than the 1997/98 funding level. To protect the small district from this funding shortfall and provide sufficient revenues to operate their special education programs, the following calculations will be employed as part of the allocation model.

LEAs with 1501 to 2500 ADA will be excluded from the calculation used to determine small LEA protection and will not contribute to the small LEA protection fund. These LEAs will not be supported at the 1997-98 revenue level.

Calculation:

1. Subtract the small LEAs current year revenue, after the deduct for regional service costs, from the 1997/98 revenue to determine the shortfall;
2. Add all of the small LEA shortfalls together to determine the total need to be covered by the large LEAs (or other funding source available for such use);
3. Divide each large LEAs total current revenue, after deducting the regional service costs, into the sum of all large LEAs revenues. This will result in the ratio of each large LEA to the total.
4. Multiply the ratio for each large LEA by the total shortfall from step 2.
5. Deduct the resulting prorated share from each participating large LEA's revenue.

The result is the final revenue amount for each large LEA

Section L – X-Pot Insurance Fund Contribution

The Desert/Mountain SELPA X-Pot Insurance Fund has been developed by the member districts to provide revenue for costs in designated areas. Those areas are:

1. **Legal/Due Process/Fair Hearing** expenditures for both SELPA and district legal counsel related to compliance findings and due process hearings when approved procedures have been followed (**See Exhibit B**);

2. **NPS/NPA Indemnification** for each LEA voting member of the SELPA Board as protection against the first \$30,000 in NPS/NPA costs;
3. **NPS/NPA expenditures** are brokered through the SELPA office to ensure consistent service, support, usage and rates. These costs are not charged against the X-pot contribution but are billed back to the district of residence at 100% of the expenditure incurred;
4. **State School Placements** and related expense;
5. **Independent educational evaluations**;
6. **Out of district/out of SELPA** expenses;
7. Education Code mandated support for **California Children Services (CCS)**, annually including limited office materials and supplies, and, after construction is completed, furnishing a new facility.
8. Other expenditure priorities as determined by the Board.

It is the intent of the member districts that the X-Pot Insurance Fund has sufficient revenue to cover the annual costs (i.e., no fund deficit). This fund will include a 5% (or more, up to \$500,000) contingency reserve for unforeseen expenses. The X-Pot Insurance Fund revenue will be generated from SELPA member districts' contribution. Each year's contribution will be calculated per the Board of Directors approved rate. This contribution will be determined for each fiscal period per the X-pot Insurance Fund Contribution Procedures.

The Desert/Mountain SELPA shall report X-Pot revenue and expenditures to the Finance and Steering Committees and the Board of Directors per the annual budget process.

Section M – X-Pot Revenue Transfer

Insurance Fund X-Pot Transfer

Revenue for the Insurance Fund shall be transferred from the SELPA member districts based on the Contribution calculation. The SELPA shall provide a worksheet for each district detailing the transfer calculation. The worksheet will be forwarded to SBCSS Internal Business to facilitate the transfer.

(See X-pot Insurance Fund Contribution Procedures)

Section N – Apportionment Distribution

With the implementation of the AB 602 model, funding has been established on a SELPA-wide ADA formula basis. The Desert/Mountain SELPA Local Plan has been amended to allow the SELPA to define the distribution model.

Revenue will be distributed from the State directly to the San Bernardino County Treasurer on a monthly basis with the Special Education apportionment cycle. The State provides documentation to SBCSS identifying the amount of the monthly special education apportionment to be deposited to the Desert/Mountain SELPA — it does not identify amounts for the member districts. Schedules detailing these SELPA level amounts are received at each certification period from the CDE identified as the Advance Apportionment (July-January), First Principal Apportionment (February-May), Second Principal Apportionment (June), and the Annual Apportionment (following February with adjustments applied to prior year June). The manner of distribution of the funds conforms to EC 14041(a) (2), which provides for the following schedule:

MONTH	DISTRIBUTION PERCENTAGE
July	6%
August	12%
September	8%
October	8%
November	8%
December	8%
January	8%
February	Reconciled with P-1 certification; revenue adjusted accordingly at 2/6 th
March	1/6 th of balance due per P-1 certification
April	1/6 th of balance due per P-1 certification
May	1/6 th of balance due per P-1 certification
June	Reconciled with P-2 certification; revenue adjusted accordingly to actual

For each apportionment period, the Desert/Mountain SELPA must submit a worksheet to SBCSS, which calculates each district's share of the State special education apportionment. The data shall include the SELPA total AB 602 revenue, each district's total, and each district's percentage of the SELPA total. At each apportionment certification, the totals must reconcile to the total posted on the SELPA's AB 602 State Exhibit. This worksheet will be used by SBCSS as the distribution model, with funds being distributed on a percentage share basis as provided on the worksheet up through May, and adjusted to actual totals based on the P-2 certification in June. If the distribution calculation is to be modified, the SELPA has until the 15th of the following month to provide the modifications to SBCSS. Any modifications will be used to calculate future revenue distribution percentages. All distributions will be reported by SBCSS to the SELPA, and by the SELPA to each member district.

Revenues affected by the SELPA Apportionment Distribution are any revenues generated under the State's AB 602 model. All revenues detailed in this procedure are apportioned to the member districts per the above schedule, with the exception of the X-Pot revenue, which is transferred to the SELPA (*see X-Pot Revenue Transfer section*).

Section O – Account Codes

County Schools shall use the following account codes to record receipt of the AB 602 State Apportionment revenue:

DESCRIPTION	FUND	RSRC	YR	GOAL	FUNC	OBJ	SCHL	MGMT
AB 602 Current Year	01	6500	0	5001	0000	8311	xxx	xxxx
AB 602 Prior Year	01	6500	0	59xx	0000	8319	xxx	xxxx

County Schools shall use the following account codes to record pass-thru of the AB 602 State Apportionment revenue from SELPA to Districts:

DESCRIPTION	FUND	RSRC	YR	GOAL	FUNC	OBJ	SCHL	MGMT
AB 602 Current Year	01	6500	0	5001	0000	8792	xxx	xxxx
AB 602 Current Year	01	6500	0	5001	0000	7221	xxx	xxxx
AB 602 Prior Year	01	6500	0	59xx	0000	8792	xxx	xxxx
AB 602 Prior Year	01	6500	0	59xx	0000	7221	Xxx	xxxx

Goal 59xx – the xx in goal denotes the appropriate prior fiscal year (i.e., 02/03 is coded as 5903)

Districts shall use the following account codes to record receipt of the AB 602 State Apportionment revenue:

DESCRIPTION	FUND	RSRC	YR	GOAL	FUNC	OBJ	SCHL	MGMT
AB 602 Current Year	01	6500	0	5001	0000	8792	xxx	xxxx
AB 602 Prior Year	01	6500	0	59xx	0000	8792	xxx	xxxx

Goal 59xx – the xx in goal denotes the appropriate prior fiscal year (i.e., 02/03 is coded as 5903)

Section P – Regional Facilities Acquisition Transfer

In response to the growth in pupils served in regional programs and the corresponding need for additional regional facilities the Desert/Mountain SELPA has developed the Regional Facilities Acquisition Process. Each district or county regional provider may request regional facilities to support the operation of a new or existing regionally operated class or program. This request is to be approved by the SELPA Board of Directors.

Upon approval of the SELPA Board of Directors, authorized costs of the portable facilities, including the costs of installation, site preparation, and necessary furniture and equipment, will be approved by the SELPA Administrator and funded from the Regional Facilities account. All authorized expenditures from the Regional Facilities account will be billed back to the districts on a per pupil basis. Site preparation and furniture & equipment spent in year one will be billed to districts in year one. Lease/Purchase costs will be amortized over a five-year period.

Regional Facilities transfer schedule is:

- 50% of the amount due, based on the prior year December unduplicated count, shall be transferred in October;

The balance shall be adjusted based on the current year P-1 pupil count and transferred at year-end.

Section Q – Regional Facility Acquisition Process

1. Requests for the acquisition of facilities to house regionally operated programs will be presented to the SELPA Issues Committee/Steering Committee for recommendation to the SELPA Board of Directors.
2. Upon approval of the SELPA Board of Directors, authorization will be given to the Administrative Services Division of SBCSS to negotiate the purchase of appropriate portable classroom facilities. The purchase of additional facilities will be authorized only after all attempts have been made to locate existing facilities available within the geographic area of need.
3. Authorized costs of portable regional facilities, including the cost of installation and site preparation, will be funded from current year SELPA X-POT reserves.
4. Authorized expenditures from the SELPA X-POT reserves will be amortized for reimbursement through an augmentation to the RLA Services Account based upon the process specified in Section III of the Agreement for Participation in the Desert/Mountain Special Education Local Plan Area. The specific amortization schedule shall be determined by the SELPA Board of Directors.
5. Title to the Desert/Mountain SELPA regional facility shall be held by the office of the San Bernardino County Superintendent of Schools. SBCSS shall maintain the responsibility for the

ongoing maintenance and operation of the facility according to the policies specified in the SELPA Local Plan.

6. The Desert/Mountain SELPA will maintain an inventory of regionally acquired facilities including their location and year of purchase. The inventory shall be verified by the SELPA Issues Committee and SELPA Steering Committee on an annual basis.
7. The location, use and disposition of regional facilities purchased through this process shall be the decision of the SELPA Board of Directors. The use of the facilities for other educational purposes during non-school hours shall be coordinated between the school site principal and the principal of SBCSS Desert/Mountain Operations.

EXHIBIT A: AB 602 Revenue Distribution

Exhibit A contains the following schedules which comprise the revenue distribution process:

- **AB 602 At-A-Glance: *NEW*** Single-Page Summary by District. Includes all AB 602 special education related revenues, deducts/expenses on one page;
- **Schedule A - SELPA State Exhibit Summary:** this form summarizes the State AB 602 Exhibit and identifies the SELPA level apportionment and rate per ADA. The amount that is passed directly through to the districts is highlighted and carries forward to Schedule C;
- **Schedule B - ADA Summary:** reflects the ADA allocated to each district. It includes the district earned ADA and the county ADA redistributed to the district of residence;
- **Schedule C - Distribution of COLA, Growth, and Equalization:** distributes each component of AB 602 to districts based on district ADA;
- **Schedule D - Allocation of Regional Service Fees, Cost to Purchase Outside Services:** calculates the total cost of special education services provided by an agency outside the district of residence (e.g. County Operations, SELPA, itinerant services, by & for other districts);
- **Schedule E - Small District Protection:** calculates the cost of protecting the revenue level of small/sparse districts. Also reflects charter school service payments and adjustments. Deducts the cost from the large district revenues to result in net revenue to all districts;
- **Schedule F-1 - AB 602 Revenue Apportionment and LEA Percentages (Revenue Sources):** breaks out the apportionment by revenue source. Column G reconciles to the AB 602 Certification Exhibit, Column H reflects the district percentage of the total AB 602 Exhibit apportionment. This schedule also includes the resource and object codes for each revenue category;
- **Schedule F-2 - Special Education Revenue Summary (AB 602 + Other Special Education related Revenue Sources):** summarizes all revenue sources that pass through the SELPA to

the districts and County. This schedule also includes the resource and object codes for each revenue category;

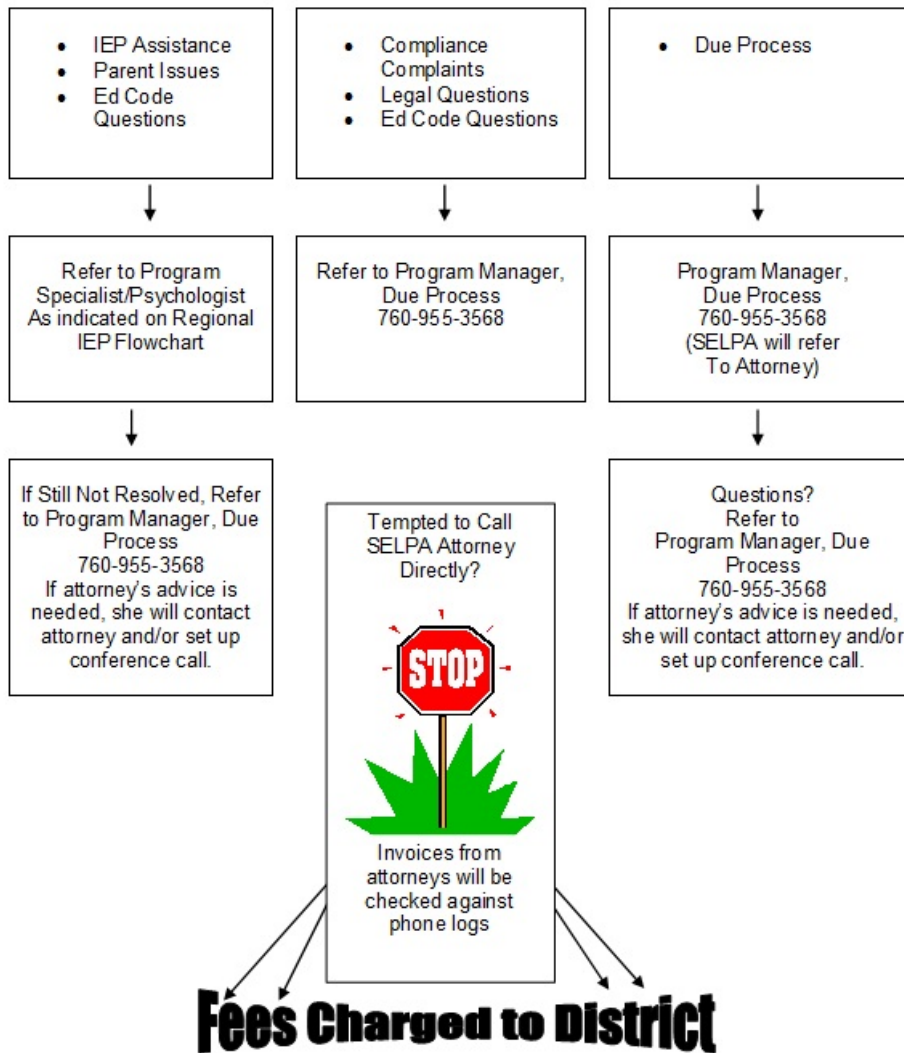
- **Schedule F-3 - CSSF Apportionment Distribution:** distributes funds, deposited in the County School Service Fund, between the County Operations programs and the SELPA programs;
- **Schedule G - SELPA Related LEA Expenditures Summary (Due to SELPA):** estimates the district costs for special education related services;
- **Schedule H - Base Revenue Limit Transfer Calculations:** estimates the BRL transfer for (1) the intra-district transfer from regular education to special education based on district SDC ADA; (2) the BRL pass through for County served students, via the K-12 Form;
- **Schedule I - Federal Funds Allocation (Local Asst., K12 Personnel Development & Preschool Staff Development):** estimates the distribution of Local Assistance, K-12 Staff Development, and Preschool Staff Development grants based on prior year P-1 pupil count;
- **Schedule J - X-Pot Contribution:** calculates each district's X-Pot contribution based on current year P-1 pupil count.
- **Schedule K - Charter Revenue Schedule:** calculates the maximum earned revenue for Independent Charter Schools based on the Fee-For-Service plus an 18% base allowance. Provides a comparison of this calculation to the actual earned revenue of the Charter School based on ADA. NOTE: A Charter School may earn up to, but not more than, the revenue generated by their ADA less their calculated X-pot contribution. (see the Charter School Funding Allocation Procedure)

Additional Schedules

- **Special Education Revenue Pool Expenditure Proposal Summary:** Schedule of planned sources and uses of funds within the Special Education Revenue Pool;
- **AB 602 State Exhibit:** Current State Exhibit;
- **Regional Service Reports:** Regional Service Reports completed Year-to-Date. Includes Service Levels and Service Costs. 1) Regional Service Monthly Pupil Count, 2) County Itinerant DIS Only, 3) Charter School Service Report, 4) Preschool Revenue Distribution.

EXHIBIT B: Attorneys' Fees Policy

Attorney Fees: Policy Exhibit B



Proposal for Revision to Small District Protection and Low Incidence Policies

A	B	C	D	E
	<u>Small District Contribution Less Than 1501 (Current Policy)</u>	<u>Small District Contribution Less Than 2501 (Proposed Policy)</u>	<u>Revenue Impact '+/-</u>	<u>Projected LIE Itinerant Costs to be Reimbursed with LI Funds</u> (Excludes LEAs with ADA < 1501 as purchased services are covered by fiscal policy)
LEA				
County Operated Programs	-	-	-	-
Academy for Academic Excellence	(54,406)	-	54,406	5,559
Norton Science and Language Academy	(30,832)	-	30,832	-
Adelanto Elementary	(306,487)	(337,523)	(31,036)	122,761
Apple Valley Unified	(497,557)	(547,942)	(50,385)	163,527
Baker Valley Unified	-	-	-	-
Barstow Unified	(238,629)	(262,793)	(24,164)	102,842
Bear Valley Unified	(87,689)	-	87,689	22,236
Excelsior Education Center	(74,690)	-	74,690	31,038
Excelsior Charter School Corona-Norco	(3,737)	-	3,737	-
Health Sciences High and Middle College	-	-	-	-
Helendale Elementary	826,211	826,211	-	-
Hesperia Unified	(829,077)	(913,033)	(83,956)	400,711
Lucerne Valley Unified	1,038,021	1,038,021	-	-
Needles Unified	1,318,403	1,318,403	-	-
Oro Grande Elementary	(186,858)	(205,780)	(18,922)	27,795
Silver Valley Unified	(80,383)	-	80,383	21,310
Snowline Joint Unified	(282,965)	(311,619)	(28,654)	142,681
Trona Joint Unified	425,031	425,031	-	-
Victor Elementary	(486,890)	(536,195)	(49,305)	144,997
Victor Valley Union High	(447,466)	-	-	-
	-	-	-	1,491,202

Notes

Total 2020/21 projected LIE funding = \$2,172,650 (738 count x \$2,944 per count).

Propose to reserve a specific amount of LIE funding at SELPA level for Pacific Hearing contracted services and equipment.

LI Itinerant costs are calculated based on students served - costs are subject to change.

(492,781)

(45,315)

305,745

Baker	-
Helendale	11,118
Lucerne	26,405
Needles	41,693
Trona	11,118
All Others	<u>1,491,202</u>
	1,581,536

California Association of Health and Education Linked Professions
Joint Powers Authority (CAHELP JPA)
GOVERNANCE COUNCIL MEETING
September 18, 2020 -10:00 a.m. Virtual Via Teleconference
Desert Mountain Educational Service Center, 17800 Highway 18, Apple Valley, California 92307

MINUTES

GOVERNANCE COUNCIL MEMBERS PRESENT:

Academy for Academic Excellence – Lisa Lamb, Apple Valley USD – Trenae Nelson, Baker Valley USD – Cecil Edwards, Bear Valley USD – Dr. Mary Suzuki, Desert Trails Preparatory Academy (DTPA) & LaVerne Elementary Preparatory Academy (LEPA) – Debra Tarver, Excelsior Charter Schools – Dr. Ronnie Henderson, Health Sciences High School and Middle College – Ian Pumpian, Helendale SD – Ross Swearingen, Hesperia USD – David Olney, Needles USD – Dr. Mary McNeil, Oro Grande SD – Heather Griggs, Silver Valley USD – Jeff Youskievicz, Snowline USD – Ryan Holman, Trona JUSD – Jairo Arellano, and Victor Elementary SD – Jan Gonzales.

OTHERS PRESENT:

Eva Neuer – Aveson Global and Aveson School of Leaders, Doreen Mulz – Ballington Academy, Tanya Taylor – Julie Lee Performing Arts Academy, Josh Stepner – Leonardo da Vinci Health Sciences Charter, and Shawn Brumfield – Pasadena Rosebud Academy.

CAHELP JPA STAFF PRESENT:

Jamie Adkins, Heidi Chavez, Peggy Dunn, Marina Gallegos, Jenae Holtz, Linda Llamas, Kami Murphy, Kathleen Peters, Daria Raines, and Jennifer Sutton.

1.0 CALL TO ORDER

2.0 PUBLIC PARTICIPATION

None.

3.0 ADOPTION OF THE AGENDA

- 3.1 **BE IT RESOLVED** that a motion was made by Debra Tarver, seconded by Trenae Nelson, that the September 18, 2020 CAHELP JPA Governance Council Meeting Agenda be approved as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

4.0 PRESENTATIONS

4.1 SBCSS D/M Operations Final 2019-20 LCFF Revenue Transfer

Marina Gallegos presented the SBCSS D/M Operations Fiscal Year 2019-20 LCFF Revenue Transfer. She asked the committee to contact San Bernardino County Superintendent of Schools (SBCSS) Internal Business Program Manager Jennifer Alvarado if there are any questions.

4.2 SBCSS D/M Operations 2019-20 Fee-For-Service Year-End Actuals

MINUTES

Marina Gallegos presented the SBCSS D/M Operations Fiscal Year 2019-20 Fee-For-Service Year-End Actuals. She asked the committee to contact SBCSS Internal Business Program Manager Jennifer Alvarado if there are any questions.

4.3 SBCSS D/M Operations 2019-20 Fee-for-Service Return

Marina Gallegos presented the SBCSS D/M Operations 2019-20 Fee-For-Service Return. She asked the committee to contact San Bernardino County Superintendent of Schools (SBCSS) Internal Business Program Manager Jennifer Alvarado if there are any questions.

5.0 INFORMATION / ACTION

5.1 Desert/Mountain SELPA Local Plan Revise (**ACTION**)

The Desert/Mountain SELPA Local Plan has been revised to align with the changes made to the CAHELP Governance Council Bylaws. Once the Local Plan is adopted by the Governance Council, the Local Plans will need to be approved by each LEA's governing board.

Jenae Holtz reported she was recently notified by California Department of Education there will be another formatting change but no change in content. She said each LEA member of Desert/Mountain SELPA must present the Desert/Mountain SELPA Local Plan Revise to its board.

5.1.1 **BE IT RESOLVED** that a motion was made by Ian Pumpian, seconded by Jeff Malan, to approve the revised D/M SELPA Local Plan as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

5.2 Desert/Mountain Charter SELPA Local Plan Revise (**ACTION**)

The Desert/Mountain Charter SELPA Local Plan has been revised to align with the changes made to the CAHELP Governance Council Bylaws. Once the Local Plan is adopted by the Governance Council, the Local Plans will need to be approved by each LEA's governing board.

Jenae Holtz reported she was recently notified by California Department of Education there will be another formatting change but no change in content. She said each LEA member of Desert/Mountain Charter SELPA must present the Desert/Mountain Charter SELPA Local Plan Revise to its board.

5.2.1 **BE IT RESOLVED** that a motion was made by Lisa Lamb, seconded by Mary Suzuki, to approve the revised D/M Charter SELPA Local Plan as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki,

MINUTES

Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

5.3 2020-21 Nonpublic, Nonsectarian School/Agency Services Master Contract (**ACTION**)

The CAHELP Master Contract for Nonpublic Schools and Nonpublic Agencies is reviewed annually by the State SELPA Administrator's Association, legal counsel for State SELPA, the Desert/Mountain SELPA and the Desert/Mountain Charter SELPA to ensure all legal requirements are met in the contract. The Desert/Mountain SELPA and the Desert/Mountain Charter SELPA policies indicate that the Master Contract and Individual Service Agreement (ISA) adopted by the SELPA and Charter SELPA will be approved by the California Association of Health and Education Linked Professions (CAHELP), Joint Powers Authorities (JPA) Governance Council and/or legal counsel and is updated per federal or state requirements. The CEO of CAHELP is requesting approval of the 2020-21 Master Contract and ISA.

5.3.1 **BE IT RESOLVED** that a motion was made by Ryan Holman, seconded by Mary McNeil, to approve the 2020-21 CAHELP Master Contract and Individual Service Agreement for Nonpublic Schools and Nonpublic Agencies as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

5.4 2020-21 CAHELP Liability Insurance Renewal (**ACTION**)

The CAHELP JPA Philadelphia Insurance policies are due to renew on October 7, 2020. These policies provide General Liability including sexual abuse and molestation, professional liability and with an umbrella for higher limits to protect the CAHELP JPA and its entities in the event of a settlement as a result of a lawsuit. The CAHELP CEO is requesting permission to pay the annual renewal premiums upon receipt to renew the Philadelphia insurance coverages.

5.4.1 **BE IT RESOLVED** that a motion was made by Trenae Nelson, seconded by Cecil Edwards, to approve the 2020-21 CAHELP JPA liability insurance renewal with Philadelphia Insurance Companies as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

5.5 Elite Academic Academy-Adult Workforce Investment Change to Virtual Preparatory Academy at Lucerne (**ACTION**)

On March 12, 2020, Lucerne Valley Unified School District approved Elite Academic Academy-Adult Work Force Investment's request to serve grades kindergarten through 12. The school is currently in the process of changing its name to operate as Virtual Preparatory Academy at

MINUTES

Lucerne. Along with these changes, they have requested to remain a member of Desert/Mountain Charter SELPA.

Jenae Holtz reported there is a name change along with a change in who the LEA provides services to due to a change in the law. Virtual Preparatory Academy of Lucerne has been approved by Lucerne Valley USD.

5.5.1 **BE IT RESOLVED** that a motion was made by Ian Pumpian, seconded by Mary McNeil, to approve the request for Elite Academic Academy-Adult Work Force Investment/Virtual Preparatory Academy at Lucerne to remain a member of Desert/Mountain Charter SELPA as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions.

5.6 Desert/Mountain SELPA and Charter SELPA Emergency Circumstances Consideration Form **(ACTION)**

Forms used in the operations of special education programs within the Desert/Mountain SELPA and Charter SELPA are developed, reviewed and revised throughout the year upon the recommendation of the Program Team. Forms are modified as necessary in order to support the operations of special education programs in an efficient, effective and legally compliant manner. Suggested revisions to SELPA Forms are submitted to the D/M SELPA and Charter SELPA Steering Committee for consideration and approval.

Jenae Holtz reported that with changes pertaining to distance learning and concerns regarding protections for students with disabilities, the Emergency Circumstances Consideration form has been created. It will be embedded in every IEP to notify parents of what distance learning could look like if an emergency occurs.

5.6.1 **BE IT RESOLVED** that a motion was made by Debra Tarver, seconded by Ronnie Henderson, to approve the Desert/Mountain SELPA Emergency Circumstances Consideration Form as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

5.7 Desert/Mountain Children's Center (DMCC) Budgets **(ACTION)**

Due to COVID-19, the DMCC budgets may have significant impacts at the end of the 2020-2021 fiscal year. The CAHELP CEO proposes to create a Budget Subcommittee consisting of superintendents, CAHELP CEO, Operations Officer and Business Consultant to propose solutions to the larger governance council.

MINUTES

Jenae Holtz explained that Department of Behavioral Health did close a contract effective September 30, 2020 for the entire county but there were enough openings in other DMCC programs to absorb the children and DMCC staff that were affected. She continued in reviewing budgets for the year, there is likely to be a shortfall. The subcommittee would look at options to recover some of the dollars. Jenae asked to be notified via email by those interested in participating in the subcommittee.

5.7.1 **BE IT RESOLVED** that a motion was made by Cecil Edwards, seconded by Mary Suzuki, to approve the creation of a Budget Subcommittee as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

6.0 CONSENT ITEMS

It is recommended that the Governance Council consider approving several Agenda items as a Consent list. Consent Items are routine in nature and can be enacted in one motion without further discussion. Consent items may be called up by any Council Member at the meeting for clarification, discussion, or change.

6.1 **BE IT RESOLVED** that a motion was made by David Olney, seconded by Heather Griggs, to approve the following Consent Items as presented. The motion carried on the following vote: 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

6.1.1 Approve the May 8, 2020 CAHELP JPA Governance Council Meeting Minutes.

6.1.2 Approve the the Association of Community Based Organizations (ACBO) 2020 Annual Membership for DMCC Director Linda Llamas in the amount of \$125.00.

6.1.3 Approve the 2021/2022 Crisis Prevention Institute (CPI) Annual Membership Recertification for Ned Broberg, Danielle Cote, Adrien Faamausili, Brian Follis, Bonnie Garcia, Renee Garcia, Blanca Medrano, Michael Norton, Sheila Parisian, and Linda Rodriguez in an amount not to exceed \$150.00 per individual membership.

6.1.4 Approve 2021 Theraplay Certification Renewals for Rosalina Becerra, Julie McNeil, and Janice Titherley at \$50.00 each and a combined total of \$150.00.

6.1.5 Approve International Critical Incident Stress Foundation (ICISF) Instructor Renewal for Belinda Jauregui in the amount of \$93.00.

MINUTES

7.0 CHIEF EXECUTIVE OFFICER AND STAFF REPORTS

7.1 CARE Solace

Jenae Holtz presented information regarding entering into contract with CARE Solace on behalf of all LEAs in the SELPA and Charter SELPA. Jenae shared this is a service that links families to mental health services in the community. It also case manages the referrals to ensure the provider takes family insurance, has availability, and connects families to providers. In speaking with the CEO, Jenae reported the contract for the entire SELPA and Charter SELPA would be at a reduced cost. She continued that any LEA currently in a contract with Care Solace would remain in that contract through June 30, 2021 then join the SELPA contract. Care Solace is preparing a proposal and Jenae will share the information once she has received it.

7.2 Real Estate JPA Update

Jenae Holtz reported that the Real Estate JPA is almost approved and formed. She shared that several documents have been received the state of California as well as from IRS with a few more items pending. Jenae stated the board members are Trenae Nelson, Ross Swearingen, and Debra Tarver.

7.3 Authorizing Charter Schools

Jenae Holtz asked for CAHELP to be notified when any member LEA is considering the authorization of a charter school. She said this will CAHELP staff to prepare and plan supports including with Web IEP.

8.0 INFORMATION ITEMS

8.1 Resolution Support Services Summary

Jenae Holtz presented the Resolution Support Services Summary stating there are less filings compared to September of 2019 but this could be due to pending decisions regarding distance learning.

8.2 Professional Learning Summary

Jenae Holtz presented the Professional Learning Summary. She said trainings have continued virtually with good attendance. Jenae said if there is a training needed by an LEA to let her know so she can make it happen.

9.0 GOVERNANCE COUNCIL MEMBERS COMMENTS / REPORTS

Jan Gonzales said she was unable to attend the CAHELP Special Education Summit on September 10,

MINUTES

2020 but her assistant superintendent did attend. The assistant superintendent was grateful and reported there was deep and appreciated conversation.

Kathleen Peters stated the class action lawsuit pertaining to failure to provide FAPE during COVID-19 that was filed in New York state was dropped. She said that is because New York does not have jurisdiction across the United States. Kathleen shared there has been a second class action lawsuit filed in California that mirrors the one previously filed in California but there are different families named. She asked for any LEAs that are served to notify her or Jenae Holtz immediately.

10.0 CEO COMMENTS

Jenae Holtz said the CAHELP Special Education Summit was a great success. She is excited about next steps because there is so much that can be done individually as well as collectively to change some of the landscape of special education. Jenae continued that the next meeting will include how to put in to action strategies that were talked about.

Jenae shared that she received an email from School Services of California which is part of Coalition of Adequate Funding for Special Education (CAFSE). There will be a webinar addressing the increase in special education numbers, the decline of enrollment, and the inadequacy of funding. The webinar is two parts, one and a half hours each on October 17 and November 3, 9:00am-10:30am. The webinar allows one member of the CAHELP team to log in so Jenae would like to participate at Desert Mountain Educational Service Center to allow for any interested superintendents to join her in the webinar.

11.0 MATTERS BROUGHT BY CITIZENS

None.

12.0 ADJOURNMENT

Having no further business to discuss, a motion was made by David Olney, seconded by Jeff Malan, to adjourn the meeting. The motion carried on the following vote 16:0: Ayes: Arellano, Edwards, Gonzales, Griggs, Henderson, Holman, Lamb, Malan, McNeil, Nelson, Olney, Pumpian, Suzuki, Swearingen, Tarver, Youskievicz. Nays: None, Abstentions: None.

The next regular meeting of the CAHELP JPA Governance Council will be held on Friday, January 29, 2021, at 10:00 a.m., at the Desert Mountain Educational Service Center, Aster/Cactus Room, 17800 Highway 18, Apple Valley, CA 92307.

Individuals requiring special accommodations for disabilities are requested to contact Jamie Adkins at (760) 955-3555, at least seven days prior to the date of this meeting.

**CAHELP JPA GOVERNANCE COUNCIL
2020-21 MEETINGS**

**Desert Mountain Education Service Center – Lilac/Yucca Room
17800 Highway 18, Apple Valley, 92307
10:00 a.m.**

September 18, 2020

February 5, 2021 at

2:00 p.m.

~~January 22, 2021~~

March 26, 2021

May 14, 2021

REQUISITION NUMBER

PREPAYMENT REQUIRED (IF YES, ATTACH VENDOR INVOICE) YES NO
 DEPOSIT REQUIRED (IF YES, ATTACH VENDOR INVOICE) YES NO
 NEW VENDOR (IF YES, ATTACH COMPLETED W-9) YES NO

VENDOR NAME: Tools to Grow, Inc. DATE: 12/16/2020
 ADDRESS: 4711 Winding Woods Lane REQUESTOR: Peggy Dunn -OT/PT DEPT.
 CITY, STATE, ZIP CODE: Hamburg, NY 47075 DELIVER TO: Desert/Mountain SELPA
 TELEPHONE NUMBER: 716-783-0663
 FAX NUMBER: _____
 VENDOR CONTACT NAME: Email: www.toolstogrowot.com
 VENDOR CONTACT EMAIL: _____

ITEM NUMBER	QUANTITY	ITEM DESCRIPTION	UNIT PRICE	EXTENDED COST
	1	Membership/license for D/M SELPA occupational and physical therapy teams. This would allow the purchase of materials for this dept. A Level #2 membership is requested which covers 10-20 members from the OT/PT teams. Jessica Marfia - Jessica.Marfia@cahelp.org PW: Tools Crystal Aden Tonia Griffin Janet Ray Lori Patricia Gonzales Lisa Sutton Wendy Guilbert-Neal Marisa DiDonato Michael Brooksby Karen Lindquist Meghan Stevens	\$ 425.00	\$ 425.00
NOTES			SUBTOTAL	\$425.00
			SALES TAX (ENTER RATE) 8.00%	\$34.00
			SHIPPING	\$0.00
			TOTAL	\$459.00

PROGRAM

- | | |
|---|---|
| ALTERNATE DISPUTE RESOLUTION (0490/DCAD) <input type="checkbox"/> | PBIS (298C) <input type="checkbox"/> |
| CAHELP (DMJ1) <input type="checkbox"/> | PROGRAM SPECIALIST (0293) <input type="checkbox"/> |
| CAPROMISE (455B) <input type="checkbox"/> | REGION 10 (0484) <input type="checkbox"/> |
| DUE PROCESS (0292) <input type="checkbox"/> | SELPA RELATED SERVICES (0297) <input checked="" type="checkbox"/> |
| FIRST 5 TRAUMA INFORMED PRESCHOOL (029P) <input type="checkbox"/> | STAFF DEVELOPMENT (0294) <input type="checkbox"/> |
| LOW INCIDENCE (0296) <input type="checkbox"/> | TPP (0455) <input type="checkbox"/> |
| OUT-OF-HOME (298B) <input type="checkbox"/> | OTHER _____ |



 APPROVED BY

_____ DATE: 12/16/2020

PURCHASE ORDER REQUISITION

REQUISITION NUMBER

PREPAYMENT REQUIRED (IF YES, ATTACH VENDOR INVOICE) YES NO

DEPOST REQUIRED (IF YES, ATTACH VENDOR INVOICE) YES NO

NEW VENDOR (IF YES, ATTACH COMPLETED W-9) YES NO

VENDOR NAME	Tools to Grow, Inc.	DATE	12/16/2020
ADDRESS	4711 Winding Woods Lane	REQUESTOR	Peggy Dunn -OT/PT DEPT.
CITY, STATE, ZIP CODE	Hamburg, NY 47075	DELIVER TO	Desert/Mountain SELPA
TELEPHONE NUMBER	716-783-0663		
FAX NUMBER	Email: www.toolstogrowot.com		
VENDOR CONTACT NAME			
VENDOR CONTACT EMAIL			

ITEM NUMBER	QUANTITY	ITEM DESCRIPTION	UNIT PRICE	EXTENDED COST
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NOTES			SUBTOTAL	\$425.00
			SALES TAX (ENTER RATE) 8.00%	\$34.00
			SHIPPING	\$0.00
			TOTAL	\$459.00

PROGRAM

ALTERNATE DISPUTE RESOLUTION (0490/DCAD) <input type="checkbox"/>	PBIS (298C) <input type="checkbox"/>
CAHELP (DMJ1) <input type="checkbox"/>	PROGRAM SPECIALIST (0293) <input type="checkbox"/>
CAPROMISE (455B) <input type="checkbox"/>	REGION 10 (0484) <input type="checkbox"/>
DUE PROCESS (0292) <input type="checkbox"/>	SELPA RELATED SERVICES (0297) <input checked="" type="checkbox"/>
FIRST 5 TRAUMA INFORMED PRESCHOOL (029P) <input type="checkbox"/>	STAFF DEVELOPMENT (0294) <input type="checkbox"/>
LOW INCIDENCE (0296) <input type="checkbox"/>	TPP (0455) <input type="checkbox"/>
OUT-OF-HOME (298B) <input type="checkbox"/>	OTHER <input type="checkbox"/>

APPROVED BY	12/16/2020 DATE
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- Print & Go Resources!
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- Excellent tools for tight spaces
- Wonderful for on the go travelling therapists
- Convenient one click download of PDF files!
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- Comprehensive and relevant for all Pediatric Therapists
- Suitable for use with clients from the early childhood through young adult years
- Effective and engaging material for use during direct treatment and assessment
- Excellent resources for use when consulting with others
- Invaluable tools for managing your caseload!
- Access to thousands of Resources, Activities, and More!!

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Free Member

Free

Free limited membership allows you access to a select amount of resources.

Individual Member

\$49.99

FULL Premium Individual Membership allows you instant access to all resources for 12 Months!

*** Excludes all items in Shop**

Group Level 1

5-9 Members

\$225.00

FULL Premium Group Membership allows your Group of 5-9 Members instant access to all resources for 12 Months!

*** Excludes all items in Shop**

Group Level 2

10-20 Members

\$425.00

FULL Premium Group Membership allows your Group of 10-20 Members instant access to all resources for 12 Months!

*** Excludes all items in Shop**

Group Level 3

21-50 Members

\$625.00

FULL Premium Group Membership allows your Group of 21-50 Members instant access to all resources for 12 Months!

*** Excludes all items in Shop**

Group Level 4

51-80 Members

\$825.00

FULL Premium Group Membership allows your Group of 51-80 Members instant access to all resources for 12 Months!

*** Excludes all items in Shop**

**** Groups of 81 or more contact us for an individualized quote =
info@ToolsToGrowOT.com**



Original Invoice
 Nonviolent Crisis Intervention® program
 Prepare Training® program
 Dementia Care Specialists

Invoice	IUS0175364
Date	7/28/2020

Federal I.D.: #39-2012874
 GST#: 86192 3753 RT0001

Bill To:

San Bernardino County Superintendent of S:
 Cheryl Goldberg-Diaz
 CAHELP
 17800 Hwy 18
 Apple Valley CA 92307
 US

Ship To:

San Bernardino County Superintendent of S:
 Cheryl Goldberg-Diaz
 CAHELP
 17800 Hwy 18
 Apple Valley CA 92307
 US

Purchase Order No.		Customer ID		Shipping Method		Payment Terms		Req Ship Date	
		1565662		US UPSND		Net 30		7/28/2020	
Ordered	Shipped	B/O	Item Number	Description				Unit Price	Ext. Price
1	1	0	CPI RECERT FEE	Annual Membership Fee Cert Year from 10/25/2020 to 10/25/2021				\$150.00	\$150.00

Thank you

Total Z-US\$	\$150.00
---------------------	-----------------

Remit to: CPI
 10850 W. Park Place, Suite 250
 Milwaukee, WI 53224 USA

Please include invoice number or customer ID with payment.

Canadian Customers - Please remit to:
 Crisis Prevention Institute, Inc
 Lockbox # 1566
 PO Box 1566, Station A
 Toronto, ON M5W 3N9 Canada

Call toll-free:
 US/Canada: 1-877-877-5390



Original Invoice
 Nonviolent Crisis Intervention® program
 Prepare Training® program
 Dementia Care Specialists

Invoice	IUS0175452
Date	7/28/2020
Federal I.D.: #39-2012874	
GST#: 86192 3753 RT0001	

Bill To:

San Bernardino County Superintendent of S
 Cecilia Holguin
 CAHELP
 17800 Hwy 18
 Apple Valley CA 92307
 US

Ship To:

San Bernardino County Superintendent of S
 Cecilia Holguin
 CAHELP
 17800 Hwy 18
 Apple Valley CA 92307
 US

Purchase Order No.		Customer ID		Shipping Method		Payment Terms		Req Ship Date	
		1565703		US UPSGND		Net 30		7/28/2020	
Ordered	Shipped	B/O	Item Number	Description		Unit Price	Ext. Price		
1	1	0	CPI RECERT FEE	Annual Membership Fee Cert Year from 10/25/2020 to 10/25/2021		\$150.00	\$150.00		
						2020 AUG -4 PM 02:05 CAHELP JPA			
						Total Z-US\$		\$150.00	

Thank you

Remit to: CPI
 10850 W. Park Place, Suite 250
 Milwaukee, WI 53224 USA

Please include invoice number or customer ID with payment.

Canadian Customers - Please remit to:
 Crisis Prevention Institute, Inc
 Lockbox # 1566
 PO Box 1566, Station A
 Toronto, ON M5W 3N9 Canada

Call toll-free:
 US/Canada: 1-877-877-5390



Invoice

2049 Ridge
Avenue
Suite 133

EIN: 36-4026564
Phone: 847.256.7334
Fax: 847.256.7370

Date	Invoice #
9/3/2020	1-44098

Customer E-mail
Chadwick.Atwater@cahelp.org

Bill To
Desert Mountain SELPA Children's Center 17800 Highway 18 Apple Valley, CA 92307

Ship To	
Desert Mountain SELPA Children's Center Rosalina Becerra Julie McNeil Janice Titherley 17800 Highway 18	
Contract	
Due Date	1/1/2021

Item	Description	Qty	Amount
Certified Therapist Dues	2021-Annual certified therapist dues Rosalina Becerra Julie McNeil Janice Titherley	3	150.00

Subtotal	\$150.00
Sales Tax (0.0%)	\$0.00
Total	\$150.00
Payments/Credits	\$0.00
Balance Due	\$150.00

Web Site
www.theraplay.org

Paid



3290 Pine Orchard Lane Suite 106 | Ellicott City, MD 21042 | 410-750-9600

Kenia Aguilar
17800 Hwy 18
Apple Valley, CA 92307
kenia.aguilar@cahelp.org

Invoice #28489

12-28-2020 15:20:56

Description	Cost
ICISF Approved Instructor valid until 12-31-2023 00:00:00 (\$93.00)	\$93.00

Transaction Details
Status: Paid
Transaction Type: Capture
Transaction ID: 42425220334
Payment Type: Credit Card
Card Holder Name: Belinda Jauregui
Card Type: Visa
Card Number:*****0906

Total Amount
\$93.00

Paid



3290 Pine Orchard Lane Suite 106 | Ellicott City, MD 21042 | 410-750-9600

Brian Follis
17800 Hwy 18
Apple Valley, CA 92307
brian.follis@cahelp.org

Invoice #28488

12-28-2020 14:38:35

Description	Cost
ICISF Approved Instructor valid until 12-31-2023 00:00:00 (\$93.00)	\$93.00

Transaction Details
Status: Paid
Transaction Type: Capture
Transaction ID: 42425135076
Payment Type: Credit Card
Card Holder Name: Belinda Jauregui
Card Type: Visa
Card Number:*****0906

Total Amount
\$93.00

Paid



3290 Pine Orchard Lane Suite 106 | Ellicott City, MD 21042 | 410-750-9600

Robin McMullen
17800 Hwy 18
Apple Valley, CA 92307
robin.mcmullen@cahelp.org

Invoice #28490

12-28-2020 15:36:59

Description	Cost
ICISF Approved Instructor valid until 12-31-2023 00:00:00 (\$93.00)	\$93.00

Transaction Details
Status: Paid
Transaction Type: Capture
Transaction ID: 42425251251
Payment Type: Credit Card
Card Holder Name: Belinda Jauregui
Card Type: Visa
Card Number:*****0906

Total Amount
\$93.00

A blurred background of a classroom with rows of wooden desks and blue chairs. A semi-transparent dark blue rectangle is overlaid in the center, containing white and green text.

California Special Education Finance System Study

Stakeholder Input Sessions

January to March 2021



Objectives for Stakeholder Engagement

1. Share findings and considerations from the implications stage of the study
2. Collect input on potential benefits and drawbacks on the considerations for inclusion in our final report



Engagement Outline

- 1) Context setting
- 2) Presentation of findings
- 3) Presentation of considerations and discussion on benefits and drawbacks
 - Inclusive Planning, Coordination, and Intervention
 - Funding for Early Childhood Special Education and other High Leverage Practices
 - Differentiated Funding Responsive to the Population



Context Setting



Purpose of the California Special Education Finance System Study

- Advance understanding of the current special education funding system.
- Learn how the system might better contribute to providing the *right* amount of funding to the *right* agencies so they can provide the *right* services to the *right* students, ultimately improving outcomes for students with disabilities.

Grounding Assumptions

- This is a study of funding distribution of state special education dollars, not funding adequacy.
- We only studied the SELPA role in the funding system, not the service delivery and other functions assigned to SELPAs.
- There is no single entity responsible for any shortcomings or able to improve the system on its own; improvement will require systemic work. We are all a part of the solution.



Study Timeline

- | | |
|------------------------------|--|
| October 2020 | Descriptive Report published |
| January to March 2021 | Gather broad stakeholder input on considerations |
| May 2021 | Publish Implications Report |

Context Setting: Key Takeaways from the Descriptive Report

- **California's special education population is growing, and the census-based allocation does not appear to have a long-term effect on identification rates.**
- **The majority of California's current special education funding formula does not differentiate based on the need of the student.**
 - 68% of students with disabilities are also low-income (versus 61% of all students)
 - 29% of students with disabilities are also English learners (versus 19% of all students)
- **Current special education funding allocation approach is a mix of funding streams that are not all purely census-based.**

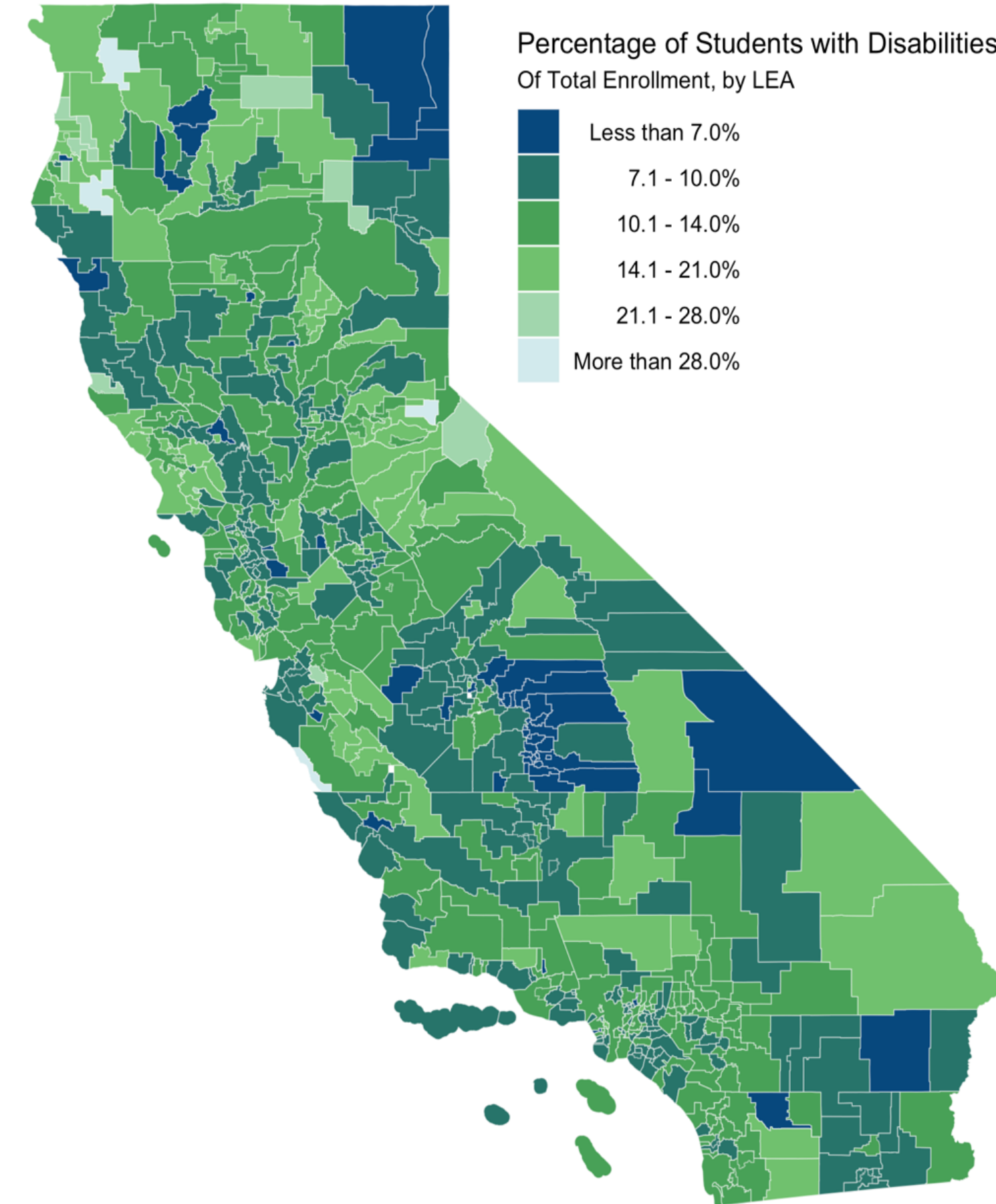
Context Setting: Key Takeaways from the Descriptive Report

- **Special education and general education funding are parallel and separate.**
- **California's approach of distributing special education funds exclusively to and through SELPAs is unique.**
 - Education Code and policies lack clarity about which entity is responsible for FAPE.
- **California's statewide high-cost pools to support LEAs with high-cost special education students are among the lowest funded in the nation.**

Key Findings and Implications

Key Finding: Current state special education allocations do not reflect variability of students with disabilities population

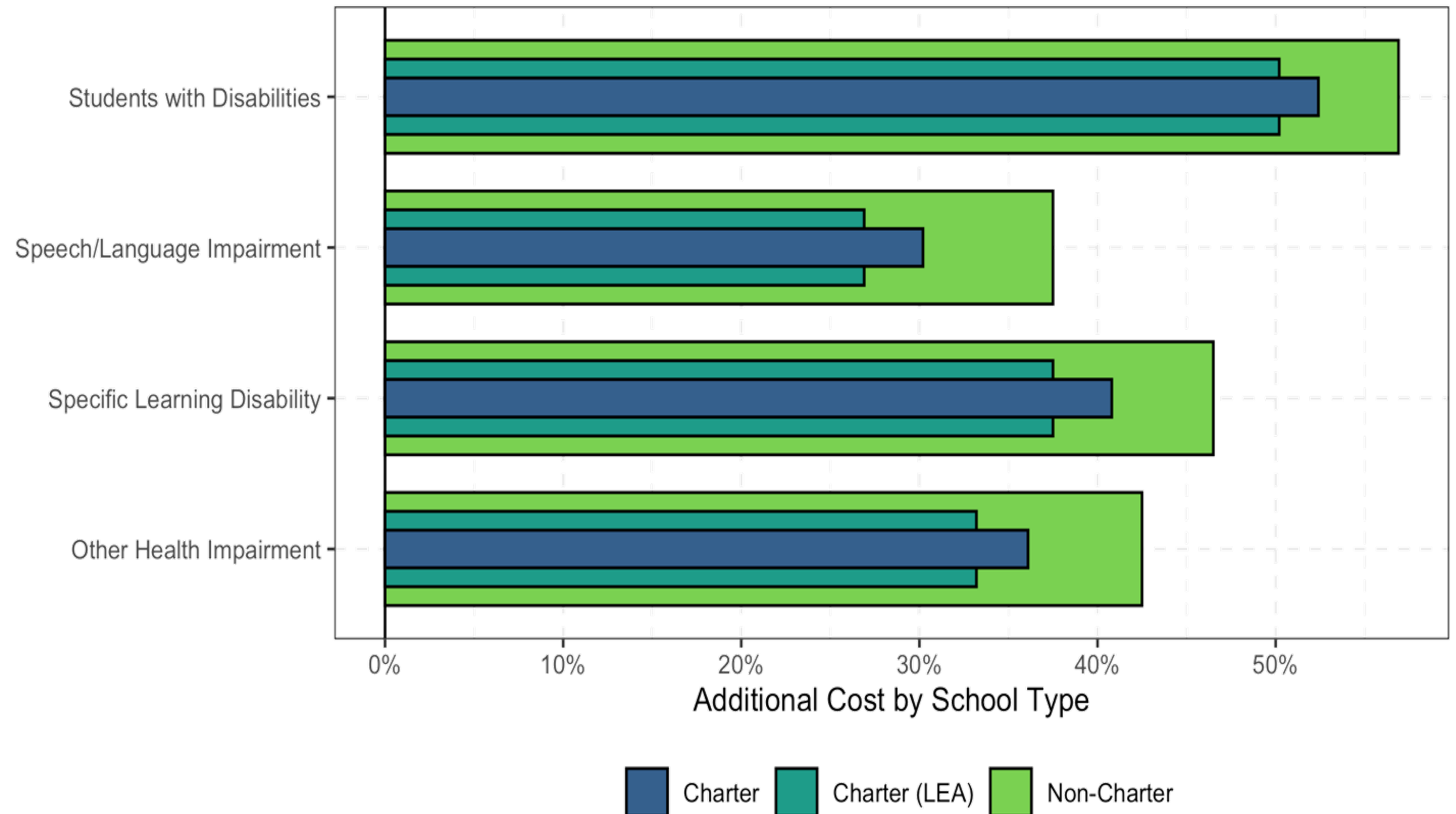
- There is a positive correlation between **cost** and **academic achievement**.
- The additional cost of programs for students with disabilities to achieve equivalent academic growth to their peers without disabilities is approximately **50.5% more**.



Source: CASEMIS, 2018-19

Key Finding: Cost of achievement varies by school type

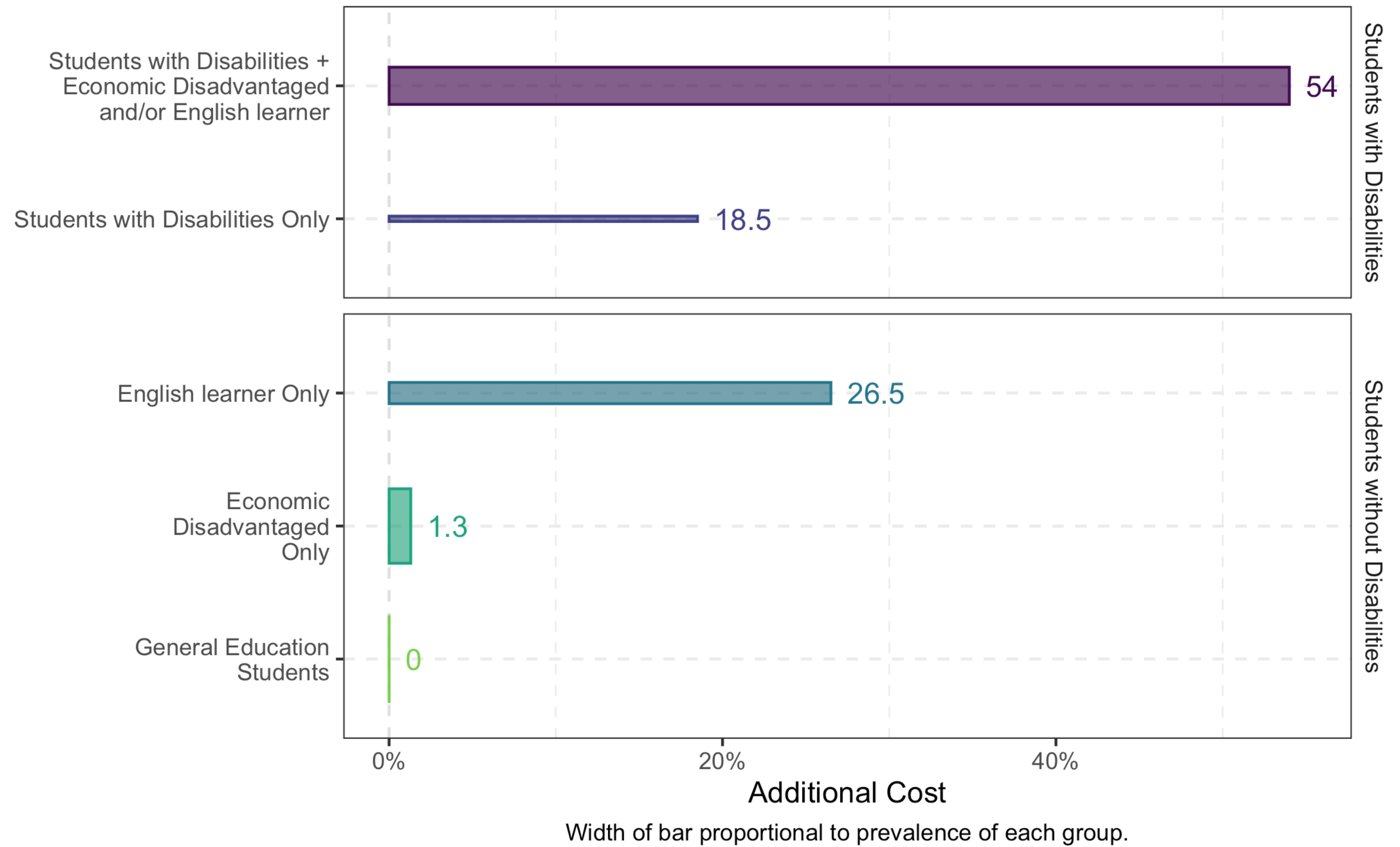
- Cost of programs that lead to student growth in **elementary** and **middle** school is **less** than cost of programs in high school.
- Cost of achieving growth for SWDs is, on average, **lower in charter schools.**

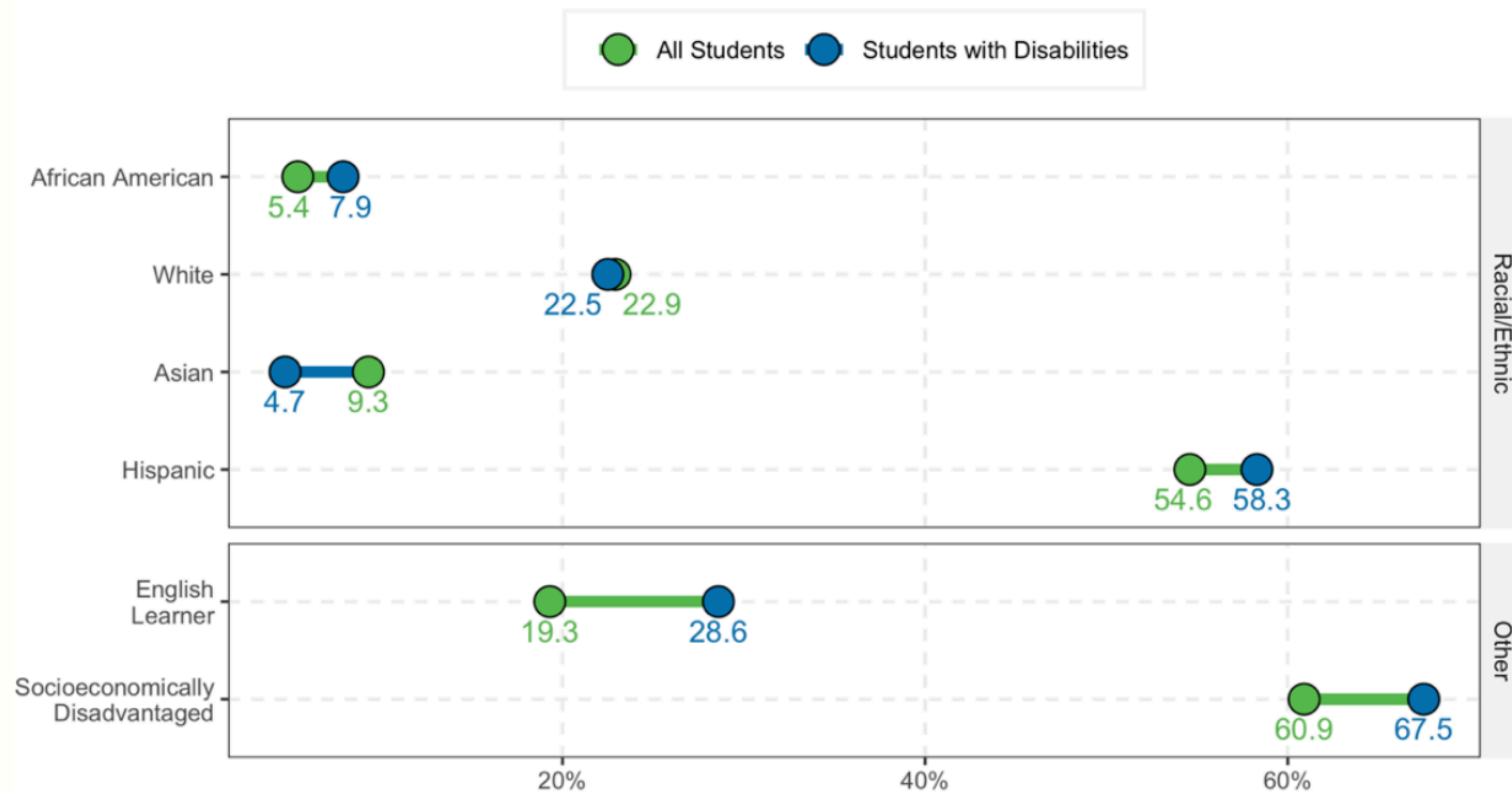


Key Finding: Cost of achievement increases with multiple needs

- The additional cost of programs for **SWDs who are also** either EL and/or economically disadvantaged is **greater than the sum** of the additional costs related to each factor alone.

Additional cost of programs for students in multiple groups compared to average cost of programs for students who do not belong to any of these groups



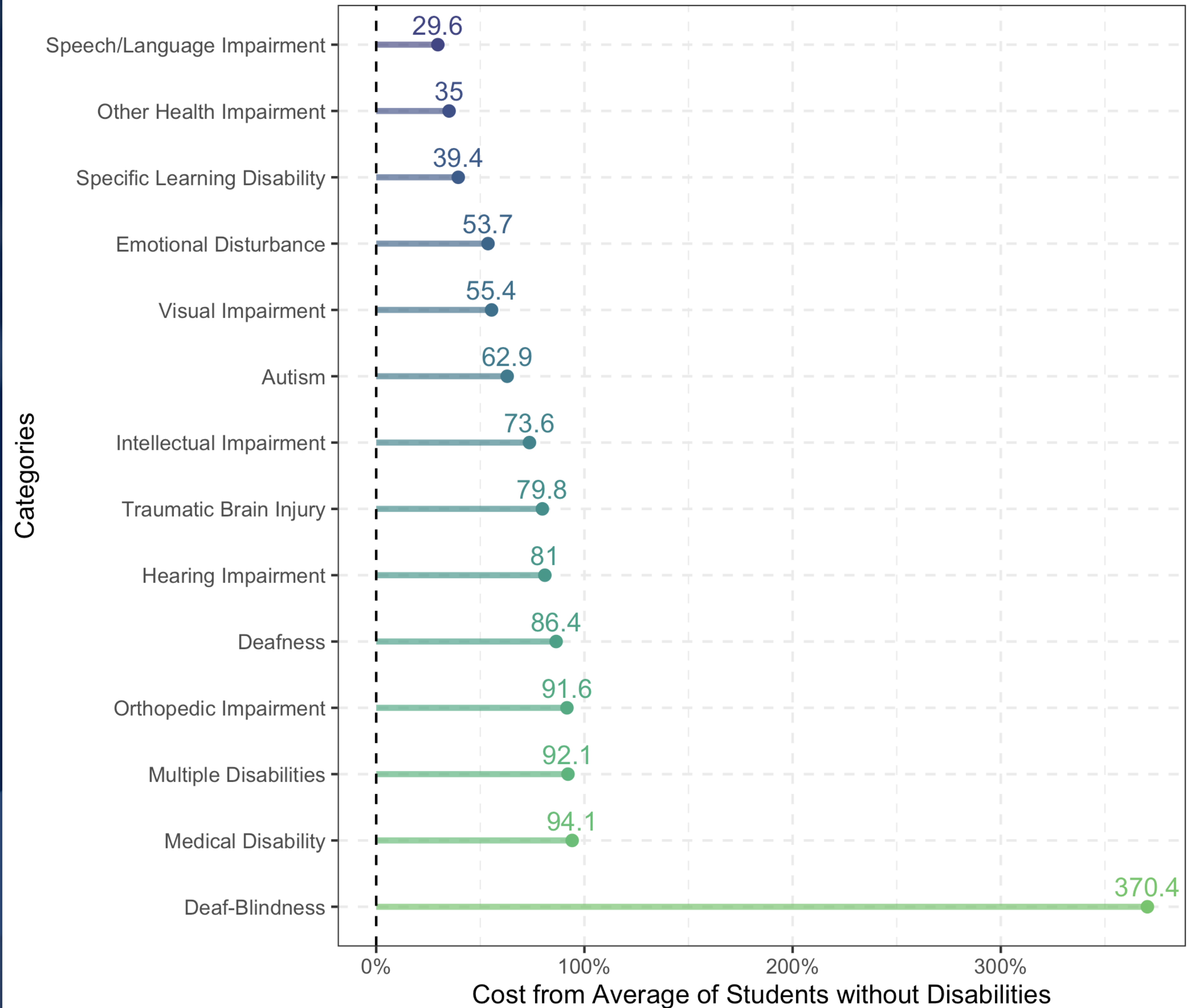


Note. Data from DataQuest Enrollment Data, 2018/19 (CDE, n.d.).

Key Finding: Students who are Hispanic, migrant, and Spanish-speaking ELs are the most likely students to be identified as having SLDs during elementary school.

Key Finding: Current allocations do not reflect variability in costs within special education

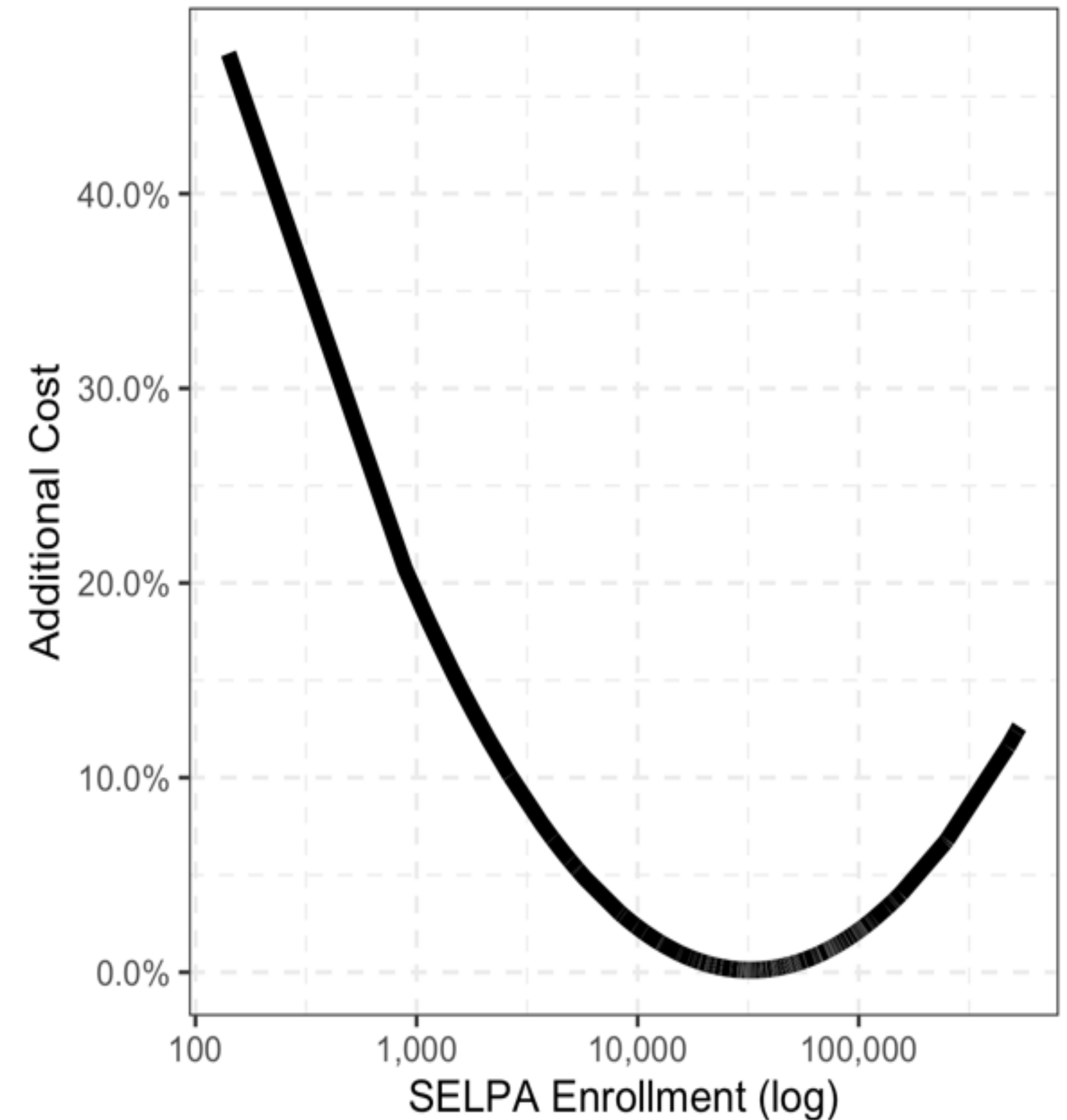
- The cost to achieve equivalent outcomes for students without disabilities varies by disability category.



Key Finding: Economies of scale for service provision observed at all levels

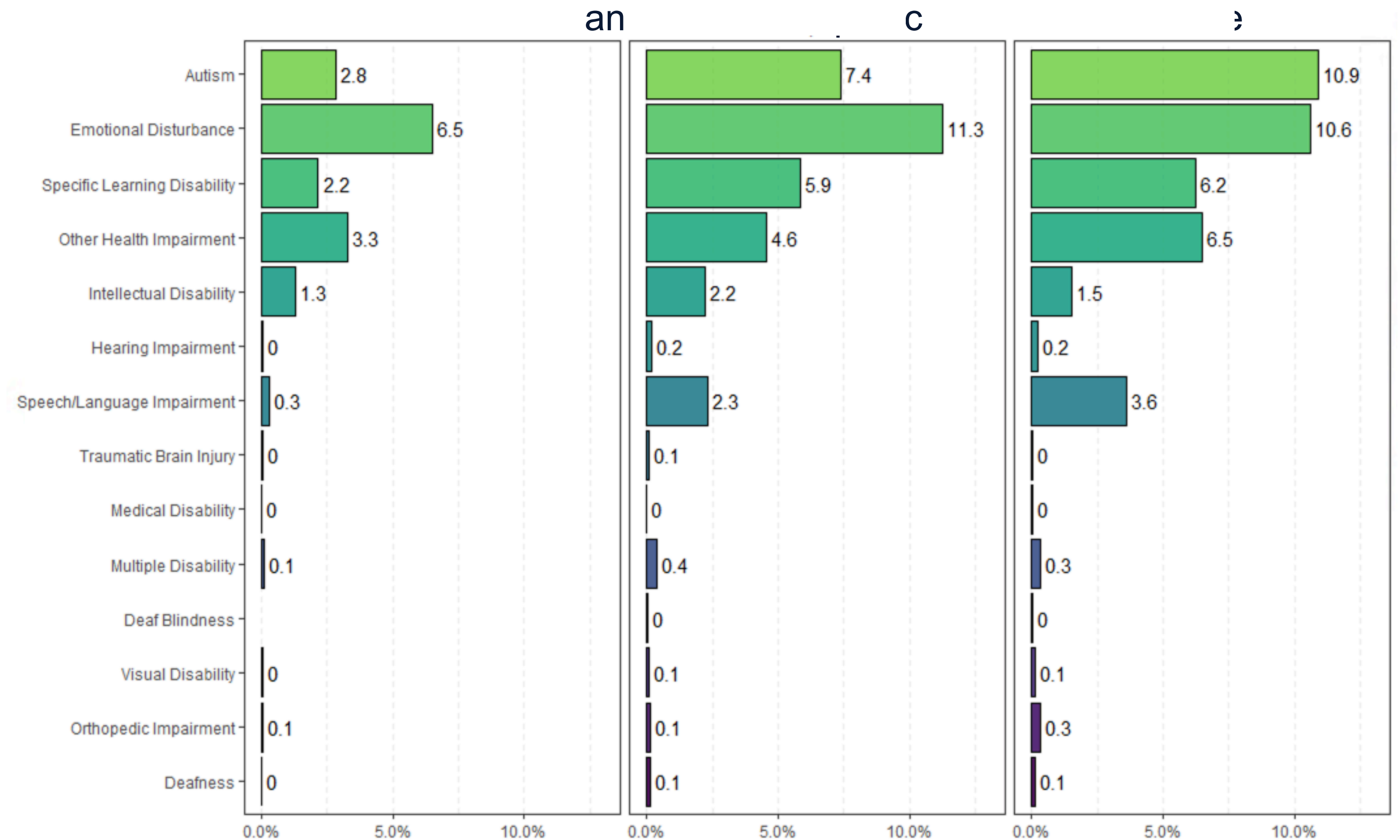
- Economies of scale were observed at the **SELPA, LEA, and school** levels.
- There are **regional differences** in the cost of providing services across CA.
- Most **educationally related mental health services** are **provided by LEAs** even though ERMHS funds are allocated and distributed to SELPAs.

Cost from minimum based on SELPA census enrollment



Key Finding: NPS Placement Patterns

- The current funding formula may incentivize placement in NPS settings.
- Students in the disability categories **Emotional Disturbance, Autism, Specific Learning Disability, and Other Health Impairment** were most likely to be placed in an NPS.
- **White students** were most likely to be placed in an NPS setting.



Percent of Total Students in an NPS Placement

Source: CASEMIS, 2018-19.

NPS placement includes Nonpublic Day School, Nonpublic Residential School (outside CA), Private Day School, Private Residential School, and Nonpublic Agency.

Considerations



Considerations

 **Inclusive Planning, Coordination, and Intervention**

 **Funding for Early Childhood Education and Other High Leverage Practices**

 **Differentiated Funding Responsive to the Population**

Inclusive Planning, Coordination, & Intervention

Long-term:

- Create one system for planning and coordination of special education and other supplemental services.

Immediate and Near-Term

- Combine planning and reporting requirements related to accountability mechanisms aimed at improving outcomes for students with disabilities, eliminating duplication between the Local Control and Accountability Plan (LCAP) and Special Education Plan (SEP).
- Identify and promote best practices for coordinating instructional supports for student groups known to be likely to be identified as having disabilities through grants for model demonstration projects and funded technical assistance projects from CDE.

Inclusive Planning, Coordination, & Intervention

Long-term:

- Continue to provide Educationally Related Mental Health Services (ERMHS) funds for services for students with and without IEPs, through a separate fund or through an allowance for flexible use of base funds.
 - Introduce flexibility for LEAs to apply to receive ERMHS funds directly when capacity to provide services is demonstrated.
 - Allow ERMHS funds to be used to develop Medi-Cal billing infrastructure and build school-based health partnerships to help LEAs realize additional reimbursement for health services.
- Transition over time from the exclusive distribution of state SPED funds to SELPAs toward a mixed distribution to LEAs and a regional entity (e.g., COEs and SELPAs).

Inclusive Planning, Coordination, & Intervention

Immediate and Near-Term:

Consider the findings from:

- Medi-Cal for Students workgroup
- LAO Workgroup examining Out-of-Home Care program
- CDE special education governance & accountability study
- CDE IEP template and alternate pathways workgroups



Discussion

- **Clarifying questions?**
- **What are the potential benefits of each of these considerations for students with disabilities?**
- **What are the potential drawbacks of each of these considerations for students with disabilities?**

Considerations

 **Inclusive Planning, Coordination, and Intervention**

 **Funding for Early Childhood Education and Other High Leverage Practices**

 **Differentiated Funding Responsive to the Population**

Funding for Early Childhood Education and Other High Leverage Practices

Long-term:

- Use one-time and ongoing funds to invest in inclusive early childhood education and early elementary personnel preparation.
- Build expertise of CDE special education and federal program staff to provide guidance to LEAs on funding strategies for coordinated interventions including braiding and blending funding strategies, incidental benefit, and the allowable use of special education funds to fund inclusive preschools.

Funding for Early Childhood Special Education and Other High Leverage Practices

Immediate and Near-term:

- Allow low incidence disabilities and other special education funds to be used for inclusive preschool programs that include students with low-incidence disabilities, other students with disabilities, and students without disabilities.
- Continue and increase competitive grant programs to create model demonstration projects for inclusive preschools and effective core instruction to reduce overidentification for special education.



Discussion

- **Clarifying questions?**
- **What are the potential benefits of each of these considerations for students with disabilities?**
- **What are the potential drawbacks of each of these considerations for students with disabilities?**

Goals of the Study's Considerations

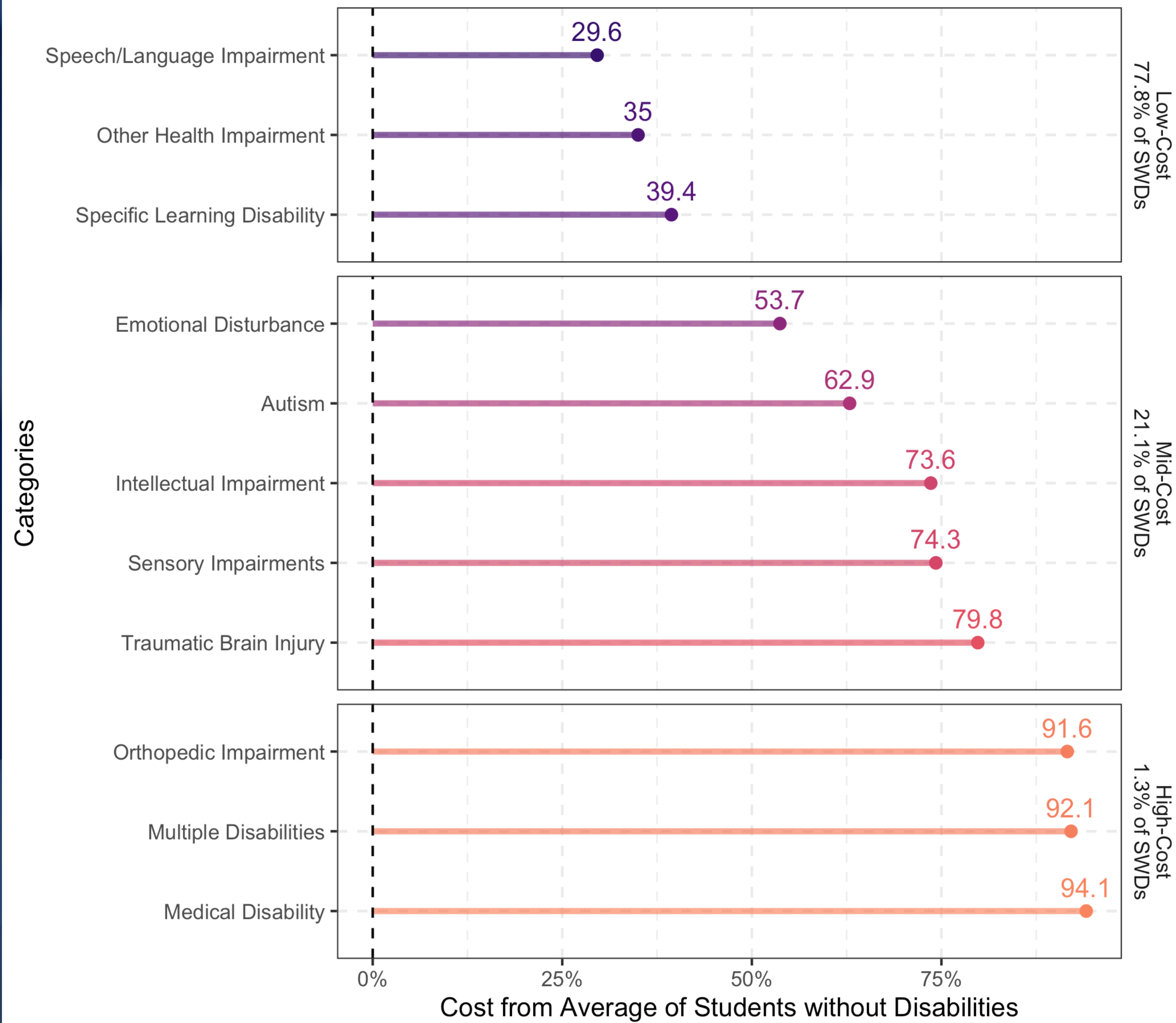
 **Inclusive Planning, Coordination, and Intervention**

 **Funding for Early Childhood Education and Other High Leverage Practices**

 **Differentiated Funding Responsive to the Population**

Long-term Consideration: Allocation Formula

- Allocate special education base funding using child count.
- Weight the allocation by disability category cost groupings; the research team established three weighted cost groupings:
 - Low: 1.34
 - Mid: 1.68
 - High: 1.92



Access to Extraordinary Cost Pool Funds

Long-term:

- Establish, adequately fund, and administer an extraordinary cost pool that is large enough to provide sufficient funds for programs for students based on a program cost threshold that is not placement dependent.
- Allow extraordinary cost pool reimbursements to be accessed by individual LEAs or consortia.
- In coordination with the LAO workgroup examining the Out-of-Home Care program and funding, consider transitioning Out-of-Home Care funds to the extraordinary cost pool.

Access to Extraordinary Cost Pool Funds

Immediate & Near-term:

- Combine the Extraordinary Cost Pool for NPS/ Licensed Children's Institutions with the Necessary Small SELPAs Mental Health Service Extraordinary Cost Pool.
- Remove the requirement for an NPS placement in order to access extraordinary cost pool funds, thereby allowing LEAs that serve students within their local community to access funds.
- Further study NPS placements.



Discussion

- **Clarifying questions?**
- **What are the potential benefits of each of these considerations for students with disabilities?**
- **What are the potential drawbacks of each of these considerations for students with disabilities?**

Thank you!

Provide additional feedback on the benefits and drawbacks of specific considerations at:

<https://forms.gle/9JZ7cbJuv4DY4Qi28>

Email questions to: caspedfunding@wested.org

Sara Doutre (sdoutre@wested.org)

Jason Willis (jwillis@wested.org)

6.2 Spirit River Complex
Verbal report, no materials

6.3 Hesperia Property

Verbal report, no materials

6.4 Desert/Mountain SELPA and Charter SELPA Local Plan Revise Board Signatures

Verbal report, no materials

6.5 Compliance Update

Verbal report, no materials

**Desert/Mountain SELPA
Due Process Summary
July 1, 2020 - January 15, 2021**

DISTRICT													CASE ACTIVITY FOR CURRENT YEAR				
	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	20/21	Total	D /W	Resolution	Mediation	Settled	Hearing
Adelanto SD	2	0	3	6	5.5	2.5	5	3	3.5	3	1.5	35	0	0	0	1.5	0
Apple Valley USD	1.33	0	0	2	1	1.5	1.5	0	3.5	10	4	24.83	1	1	1	1	0
Baker USD	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Barstow USD	1	0	0	0	0	1	3.5	0	2	0	1	8.5	0	1	0	0	0
Bear Valley USD	0	1	0	0	0	0	1	2	0	0	1	5	0	0	0	1	0
Helendale SD	0	0	0	0	0	0	0	1	0	0	0	1	0	0	0	0	0
Hesperia USD	1	5.5	4	3	5	7.5	7	6	7	17.5	5	68.5	0	0	1	4	0
Lucerne Valley USD	4	0	1	2	1	1	2	0	1.5	0	0	12.5	0	0	0	0	0
Needles USD	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Oro Grande SD	0	0	0	0	0	0	0	0	0	2	0	2	0	0	0	0	0
Silver Valley USD	0	1	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0
Snowline USD	0	2	1	1	5	4.5	6.5	2	8.5	7	1	38.5	0	0	0	1	0
Trona USD	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Victor Elementary SD	1	1	1	4.33	3.33	1.83	2.5	6.5	0	7	1	22.5	0	0	0	1	0
Victor Valley Union High SD	0	2	4	3.33	4.3	7.83	4	4	8.5	6.5	4.5	49	0	1	1	2.5	0
Academy for Academic Excellenc	1.33	0	0	4	2	0	1	2	1	1	1	13.33	0	0	0	1	0
CA Charter Academy	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Desert/Mountain OPS	0.34	0.5	1	1.33	0.83	4.33	3	1.5	3	2	0	17.83	0	0	0	0	0
Excelsior Education Center	0	0	0	0	0	0	0	0	0.5	2	0	2.5	0	0	0	0	0
Health Sciences HS & MS	0	0	0	0	0	0	0	0	1	1		2	0	0	0	0	0
SELPA-WIDE TOTALS	12	13	15	33	27.96	33	37	28	40	*59	20	304	1	3	3	13	0

Districts showing a value of .50 above indicates that the district is a co-respondent with another district.

*Number accounts for High Tech High but has exited from CAHELP. Actual count for 2019-20 is 67.

**Desert/Mountain SELPA
Due Process Activity Summary
July 1, 2020 – January 15, 2021**

LEA Case Number	Issue(s)	Date Filed	Resolution Scheduled	Mediation Scheduled	Pre-Hearing Conference	Due Process Hearing	Status
1. Apple Valley Case No. 2020070137	<ol style="list-style-type: none"> Appropriate services, goals, placement, accommodations Failure to implement IEP as written Denial of Home instruction Failure to timely assess and review evaluations Failure to provide accommodations for cheer tryouts 	07/03/20	07/13/20 07/16/20 08/14/20	08/27/20	08/17/2020 09/21/20	08/25- 8/27/2020 09/29- 10/01/20	Resolution unsuccessful. Parent demands placement of daughter on cheer team, reimbursement for private/city cheer team participation, compensatory ed, Spanish class letter grade change. Parent agreed to mediation then withdrew. Preparing for hearing. 8/26/20 parent withdrew from mediation. Prepare for hearing. 9/26/20 case dismissed by parent. CLOSED
2. Hesperia USD Case No. 2020070579	<ol style="list-style-type: none"> Appropriate placement and program Statutorily appropriate LAS assessment 	07/17/20	7/31/20 08/17/20	09/08/20	10/26/20	11/03- 11/15/20	08/26/20 settlement agreement for DMCC ERMHS, IEE-speech; service increases to speech and occupational therapy. Comp. education: speech, counseling, tutoring. CLOSED
3. VVUHSD Case No. 2020070920	<ol style="list-style-type: none"> Appropriate placement and program Failure to make progress Failure to provide ABA aide at parent request Minimal services during COVID 19 	07/29/20	08/11/20		09/11/20	09/22- 09/24/20	08/28/20 settlement agreement for comp. education: tutoring, speech language, occupational therapy. CLOSED
4. Hesperia Case No. 2020070962	<ol style="list-style-type: none"> Appropriate program in LAS, Fine Motor, Behavior Statutorily appropriate LAS assessment and psycho ed assessment 	07/30/20	08/07/2020 08/18/20	09/17/20	09/11/20	09/22- 09/24/20 10/20- 10/22/20	08/27/20 settlement agreement for IEEs: speech language, FBA, Psycho-Ed. IEP additions: increase in speech language, occupational therapy. Comp. education: tutoring, speech. CLOSED

**Desert/Mountain SELPA
Due Process Activity Summary
July 1, 2020 – January 15, 2021**

LEA Case Number	Issue(s)	Date Filed	Resolution Scheduled	Mediation Scheduled	Pre-Hearing Conference	Due Process Hearing	Status
5. VVUHSD 2020080045	Child Find 1. Severe depression 2. Hospitalized 4x 3. Failing classes	08/05/20	8/18/20		09/14/20	09/22- 09/24/20	Seeking identification as SPED in order to cover residential placement. Student in medical RTC in Whittier. Upon release, VVUHSD to commence assessment. Settlement 08/27/20 - CLOSED
6. Victor Elem SD 2020080331	Child Find 1. Failure to assess	08/12/20	09/02/20		09/28/20	10/06- 10/08/20	Student had 504 in Victor Elem SD; VVUHSD found eligible for special education. Seeking comp. education. Settlement 9/24/20 - CLOSED
7. Adelanto SD & VVUHSD 2020080427	Denial of FAPE 1. Health plan 2. Academic 3. Complete assessment	08/13/20	08/25/20		09/25/20	10/06- 10/08/20	09/28/20 settlement agreement; fund IEE – Psycho ed; IEP to modify goals, health plan, and implementation with parent; comp. education; CLOSED
8. Hesperia USD 2020090471	Denial of FAPE 1. Failure to assess in all areas 2. Failure to offer SLP, ERMHS 3. Failure to provide appropriate SAI 4. Lack of appropriate goals 5. Failure to implement IEP	09/16/20	09/23/20 10/05/20	11/17/20	11/02/20 12/21/20	11/10- 12/20/20 01/05- 01/07/21	Mediation goal: comp. ed. differences, teacher placement. Settlement agreement 11/18/20: IEP program enrollment, reassigned class to avoid teacher; CLOSED
9. Adelanto 2020090691	Denial of FAPE 1. Inappropriate program & placement 2. Inaccurate MD 3. Failure to provide FBA 4. No services Feb 2020-May 2020	09/22/20	09/29/20 expedited	10/07/20 Expedited 11/19/20 regular		10/20- 10/22/20 Expedited 11/17- 11/19/20 Regular 01/12- 01/14/21	LEA retracting MD; requesting to dismiss expedited status; gathering DLP data for expedited mediation or regular resolution; expedited status dismissed. Proceeding with regular mediation. 11/23/20 settlement agreement: FBA assessment, IEE for ERMHS, 1:1 behavior aide in home, DMCC and VCC intensive; CLOSED

**Desert/Mountain SELPA
Due Process Activity Summary
July 1, 2020 – January 15, 2021**

LEA Case Number	Issue(s)	Date Filed	Resolution Scheduled	Mediation Scheduled	Pre-Hearing Conference	Due Process Hearing	Status
10. VVUHSD 2020100043	Denial of FAPE 1. Failed to hold an IEP in February 2019 2. Failed to hold an IEP in February 2020 3. Failed to conduct triennial assessment October 2019	09/22/20	10/14/20 10/15/20 11/04/20	12/03/20	11/13/20 01/22/21	11/24- 11/25/20 02/02-04/21	Child has not been in school since before 2019. Parent refusing placement. Wants full-day SDC class with no class changes. District holds not FAPE.
11. Apple Valley USD 2020100583	Denial of FAPE 1. Substantive concerns for IEPs dated: 10/2018, 10/2019, 03/2020, and 07/2020 2. Home instruction failed to provide FAPE 3. Fall 2019 Triennial timeline 4. Failure to provide parent a copy of IEP 5. Failure to provide accommodations to cheer tryouts 6. Failure to implement IEP during COVID-19	10/16/20	10/28/20	12/17/20	11/30/20 02/08/21	12/08- 12/10/20 02/17-18/21	No settlement at resolution. Parent remains angry; filing staff complaints. LEA offering compromises and not accepted. Mediation scheduled.
12. VVUHSD 2020100503	Child Find	10/16/20	10/30/20 11/17/20		11/30/20	12/08- 12/10/20	12/03/20 student awaiting release of psychiatric hold for RTC; placement tolling agreement
13. Hesperia USD 2020110001	Denial of FAPE 1. Failure to conduct triennial assessment Sept 2020 2. Lack of educational benefit a. reading goal b. writing goal c. math goal	10/30/20	11/10/20 11/09/20		12/14/20	12/22- 12/24-20	11/30/20 settlement agreement - Comp. ed; CLOSED

**Desert/Mountain SELPA
Due Process Activity Summary
July 1, 2020 – January 15, 2021**

LEA Case Number	Issue(s)	Date Filed	Resolution Scheduled	Mediation Scheduled	Pre-Hearing Conference	Due Process Hearing	Status
14. Academy for Academic Excellence 2020110282	Denial of FAPE 1. Failure to assess comprehensively 2. Failure to provide dyslexia program	11/09/20	11/20/20		12/28/20	01/05-07/21	Preliminary agreement; 12/18/20 settlement agreement – academic ERHMS comp. ed., IEE – dyslexia assessment; CLOSED
15. Snowline JUSD 2020110297	Denial of FAPE 1. Failure to make specific offer of FAPE Denial of parent participation 1. Failure to provide timely records 2. Failure to ensure team members participation	11/09/20	11/16/20		12/28/20	01/05-07/21	Parent seeking reimbursement for tuition at NPS, for summer tutoring expenses, for summer NPS placement, transportation reimbursement for private services; settled 12/01/20; CLOSED
16. Apple Valley USD 2020110631	Denial of FAPE failure to provide: 1. FBA 2. Behavior Plan 3. Appropriate services 4. Ambitious goals 5. Distance learning FAPE Failure to assess: 1. SLP 2. OT 3. ATC 4. PT 5. Psycho-ed triennial	11/19/20	12/04/20	01/13/21	01/04/21	01/12-14/21 03/2-4/21	Settlement demand viewed as excessive. Opposing counsel seeking to amend complaint after IEP of 12/09/20. AVUSD to cross-file.

**Desert/Mountain SELPA
Due Process Activity Summary
July 1, 2020 – January 15, 2021**

LEA Case Number	Issue(s)	Date Filed	Resolution Scheduled	Mediation Scheduled	Pre-Hearing Conference	Due Process Hearing	Status
17. Hesperia USD 2020120175	Denial of FAPE 1. Failure to assess in all areas 2. Failure offer meaningful goals 3. Failure to offer appropriate goals 4. Failure to find Autism 5. No FBA 6. Learning loss as a result of COVID-19	12/03/20	12/14/20	01/19/21	01/18/21 03/08/21	01/26-28/21 03/16-18/21	12/04/20 resolution cancelled by mutual agreement.
18. Bear Valley USD 2020120196	Denial of FAPE 1. Child Find 2. Prior knowledge of TBI	12/04/20	12/10/20 Expedited	12/18/20 Expedited	01/11/21 Expedited 01/11/21 Regular	01/20-21/21 Expedited 01/26-28/21 Regular	Parent seeking to overturn expulsion. Settled all claims at mediation - full assessment by LEA, IEE for CAPD, removal of expulsion. CLOSED
19. Barstow USD 2020120631	Denial of FAPE 1. Failure to assess for ERHMS and FBA 2. Goals not reasonably calculated a. math b. reading c. writing 3. Lack of service during COVID-19	12/22/20	01/15/21 Expedited		02/01/21	02/09-11/21	
20. Apple Valley USD 2020120771	Denial of FAPE 1. Goals not reasonably calculated a. reading b. writing c. math 2. Lack of comprehensive assessment 3. Inadequate SAI	12/22/20 Received 01/04/21	01/11/21		02/01/21	02/09-11/21	

Desert /Mountain SELPA
Legal Expense Summary
As of January 15, 2021

2000-2001	\$39,301.51
2001-2002	\$97,094.90
2002-2003	\$37,695.13
2003-2004	\$100,013.02
2004-2005	\$136,514.09
2005-2006	\$191,605.08
2006-2007	\$140,793.00
2007-2008	\$171,614.04
2008-2009	\$263,390.71
2009-2010	\$114,076.96
2010-2011	\$293,578.50
2011-2012	\$567,958.10
2012-2013	\$321,646.04
2013-2014	\$250,372.65
2014-2015	\$297,277.76
2015-2016	\$204,756.26
2016-2017	\$233,130.03
2017-2018	\$247,459.52
2018-2019	\$314,479.71
2019-2020	\$475,930.79
2020-2021	\$120,111.00

**Desert/Mountain Charter SELPA
Due Process Summary
July 1, 2020 - January 14, 2021**

D = Complaint Dismissed W = Complaint Withdrawn

DISTRICT										CASE ACTIVITY FOR CURRENT YEAR					
	13/14	14/15	15/16	16/17	17/18	18/19	19/20	20/21	Total	D/W	Resolution	Mediation	Settled	Hearing	
Allegiance STEAM Acad - Thrive	N/A	N/A	N/A	N/A	N/A	0	0	0	0		0	0	0	0	0
Aveson Global Leadership Acad	N/A	N/A	2	1	5	1.5	0	0	9.5		0	0	0	0	0
Aveson School of Leaders	N/A	N/A	0	3	1	1.5	0	0	5.5		0	0	0	0	0
Ballington Acad for Arts & Sci	N/A	N/A	N/A	N/A	0	2	0	0	0		0	0	0	0	0
Desert Trails Prep Academy	0	0	0	0	0	0	0	0	0		0	0	0	0	0
Encore Junior/Senior High School	0	0	0	0	0	0	0	0	0		0	0	0	0	0
Encore High School, Riverside	N/A	N/A	0	0	0	1	1	0	2		0	0	0	0	0
Julia Lee Performing Arts Acad	N/A	N/A	N/A	N/A	N/A	0	0	0	0		0	0	0	0	0
LaVerne Elem Preparatory	0	0	0	0	0	0.5	0	0	0.5		0	0	0	0	0
Leonardo da Vinci Health Sci	0	0	0	0	0	0	0	0	0		0	0	0	0	0
Odyssey Charter School	N/A	N/A	0	0	0	0	0	0	0		0	0	0	0	0
Odyssey Charter School - South	N/A	N/A	N/A	N/A	N/A	0	0	0	0		0	0	0	0	0
Pasadena Rosebud Academy	N/A	N/A	N/A	N/A	N/A	1	0	0	1		0	0	0	0	0
Pathways to College	0	0	0	0	0	0	0	0	0		0	0	0	0	0
Taylion High Desert Academy	0	0	0	0	0	0	0	0	0		0	0	0	0	0
SELPA-WIDE TOTALS	0	0	2	4	6	7.5	1	0	18.5		0	0	0	0	0

**Desert/Mountain Charter SELPA
Due Process Activity Summary
July 1, 2020 – January 14, 2021**

LEA Case Number	Issue(s)	Date Filed	Resolution Scheduled	Mediation Scheduled	Pre-Hearing Conference	Due Process Hearing	Status
1. LEA Case No. 2020							
2. Case No. 2020							
3. Case No. 2020							
4. Case No. 2020							

Desert /Mountain Charter SELPA
Legal Expense Summary
As of January 14, 2021

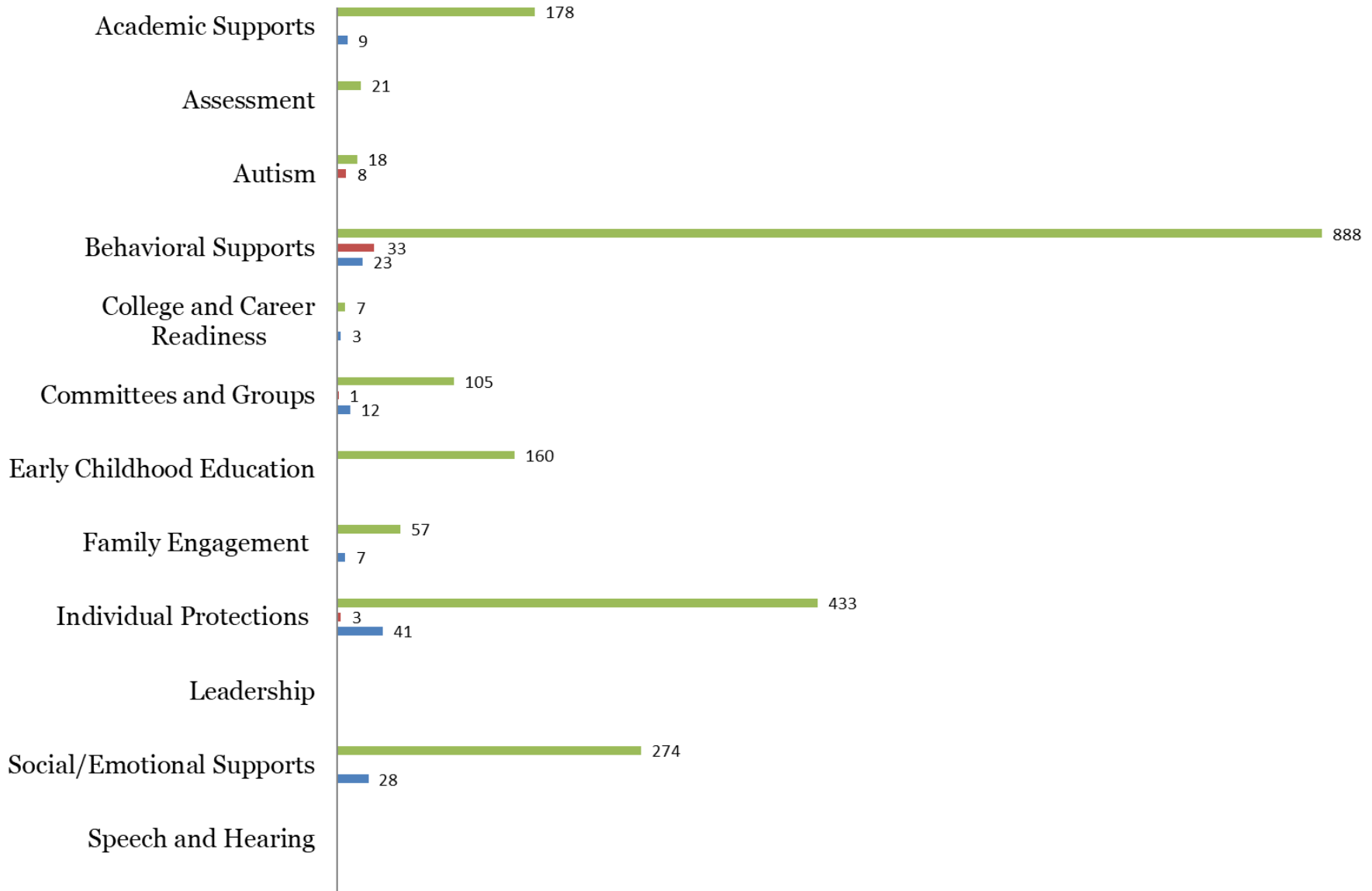
2000-2001	0.00
2001-2002	0.00
2002-2003	0.00
2003-2004	0.00
2004-2005	0.00
2005-2006	0.00
2006-2007	0.00
2007-2008	0.00
2008-2009	0.00
2009-2010	0.00
2010-2011	0.00
2011-2012	0.00
2012-2013	0.00
2013-2014	0.00
2014-2015	0.00
2015-2016	7,378.00
2016-2017	33,886.61
2017-2018	70,994.67
2018-2019	113,834.81
2019-2020	58,033.90
2020-2021	6,099.00

D/M SELPA PROFESSIONAL LEARNING PARTICIPATION SUMMARY

DECEMBER 2020 - 168 PARTICIPANTS

2141 YEAR-TO-DATE PARTICIPANTS

■ Total Participants YTD by Content Area ■ On-Site Trainings ■ Regional Trainings



D/M CHARTER SELPA PROFESSIONAL LEARNING PARTICIPATION SUMMARY

DECEMBER 2020 - 5 PARTICIPANTS

111 YEAR-TO-DATE PARTICIPANTS

■ Total Participants YTD by Content Area ■ On-Site Trainings ■ Regional Trainings

