

**CHIEF FISCAL OFFICERS MEETING  
AGENDA  
Wednesday, March 16, 2022  
12:00 p.m. – 2:30 p.m.**

12:00 p.m. – 12:15 p.m.                      Lunch  
12:15 p.m. – 2:30 p.m.                      CFO Meeting

- 1) **Introductions and What's New**
  - a) Additions to the agenda
  - b) District Sharing
- 2) **Reminders**
  - a) Interest due quarterly on federal funds if over \$500. See CDE website for list of Federal Resources that may be EXCLUDED from the calculation. <https://www.cde.ca.gov/fg/ac/co/reimbursableprograms.asp>
  - b) AB1200 Public Disclosure-include copy of Tentative Agreement (TA) and Multi-Year Projection (MYP) when submitting
    - Form should be signed by BOTH Superintendent and CBO before submitting
    - Disclosure of a settlement is required even if no salary/benefit change
  - c) AB2197 disclosure required for non-voter approved debt
  - d) Document wages charged to federal/state programs (CSAM Procedure 905: Personnel Activity Reports (PARs))
  - e) Complete Admin to Teacher ratio form. (Retain for your audit records)
  - f) Reconcile payroll liability accounts
  - g) Abatements: Please notify your Business Advisor if you are abating revenues or expenditures. This will ensure that budgets and Cash Flow projections are accurate.
- 3) **Date Reminders**
  - a) **March 17<sup>th</sup> – District Second Interims Due**
    - District Second Interim due to COE (also to SSPI and State Controller's Office [SCO] if qualified or negative) (EC § 42131[a][1],[2], and [3])
    - Second Interim Documents Due to SCSOS:
      - (1) Signed Form CI
      - (2) Official First Interim DAT file
      - (3) LCFF Calculator
      - (4) Technical Review Checklists (TRCs)
      - (5) Include Form SEMAI data
  - b) **April 1<sup>st</sup> – FY 2021-22 Auditor service contracts due to SCSOS (EC § 41020[b][3])**
  - c) **April 1<sup>st</sup> – A-G Completion Improvement Grant Plan must be in place**
  - d) **April 1<sup>st</sup> – Classified School Employees Summer Assistance Program requires that “participating LEA shall notify the CDE that it elected to participate in the program, specify the number of classified employees that have elected to participate, and estimate the total amount to be withheld from participating classified employee paychecks for the applicable school year.**
- 4) **Technology**
  - a) IT Department Update
  - b) Escape Update
- 5) **Payroll**
- 6) **2022-23 CFO Calendar Discussion (pg. 3)**
- 7) **New SACS Software Update (pg. 5)**

- 8) **ESSCO: External Services Subcommittee**
  - a) **ELOP Proposed Audit Penalties (pgs. 7-8)**
    - **Are any LEAs planning to return funding?**
  - b) **Charter Net Shift Proposed Changes (pgs. 9-10)**
  
- 9) **Articles (pgs. 11-24)**
  - a) ***CASBO NewsBreak: Top 2022 Legislative Bills to Watch; Update to Cal/OSHA Emergency Temporary Standards***
  - b) ***SSC Fiscal Report: Top Legislative Issues—March 4, 2022***
  - c) ***SSC Fiscal Report: Ask SSC . . . Transition Plan Back to In-Person Instruction***
  - d) ***SSC Fiscal Report: Critical Deadlines and Funding Opportunities***
  
- 10) **Workshops/Webinars (pgs. 25-28)**
  - a) **SSC Webinars & Workshops**
  - b) **CASBO Webinars & Workshops**
  
- 11) **Next Meeting**
  - a) **April 20<sup>th</sup> – Board Room/Zoom**

# DRAFT

## CFO Meeting Schedule

2022-2023

12:00PM\* – 3:00PM

DATE	LOCATION*
July - No Meeting	N/A
August 17, 2022	N/S Board Room
September 21, 2022	N/S Board Room
October 19, 2022	N/S Board Room
November 16, 2022	N/S Board Room
December 21, 2022	N/S Board Room
January 18, 2023	N/S Board Room
February 15, 2023	N/S Board Room
March 15, 2023	N/S Board Room
April 19, 2023	N/S Board Room
May 17, 2023	N/S Board Room
June 21, 2023	N/S Board Room

\*While COVID-19 related social distancing protocols are in place, meetings for all attendees will be held remotely via Zoom beginning at 1 pm. When social distancing protocols are not in place, meetings will be held in the location above at 12:00 pm, and attending remotely via Zoom will be optional.



[Click Here for COVID-19 Related Resources](#)

## FISCAL REPORT

*PUBLIC EDUCATION'S POINT OF REFERENCE FOR MAKING EDUCATED DECISIONS*

### CDE Releasing Web-Based SACS Software

 [BY MATT PHILLIPS, CPA](#)

 [BY TAMI MONTERO, CFE](#)

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posted March 9, 2022

After many, many years of using the legacy Standardized Account Code Structure (SACS) software, the California Department of Education (CDE) is planning to launch the web-based platform for SACS on April 5, 2022. The web-based SACS software will be required for 2021-22 Estimated Actuals and 2022-23 Adopted Budget; however, the 2021-22 Unaudited Actuals will remain on the legacy platform. The 2021-22 Unaudited Actuals will be the final time that local educational agencies (LEAs) will use the legacy platform as all reporting periods for the 2022-23 fiscal year and beyond will be reported in the web-based SACS software.

Change is never easy, especially when a lift as large as this is on the horizon. To help mitigate the learning curve, LEAs have a couple of options available. The first wave of support will be CDE-sponsored trainings provided by select county offices of education (COEs) across the state. These half-day trainings will teach end users how to use the new SACS web-based system, and will provide instruction on the utilization of the web-based SACS software, including setting up users in the system, and the navigation between the screens used to complete the financial statements and related forms. The trainings will occur between April 6 and April 26, 2022, and registration links will be available through the CDE, host COE, and the Fiscal Crisis and Management Assistance Team's (FCMAT) websites. The official schedule announcing the trainings will be available the week of March 14.

The second wave of support is a four-hour webinar on April 19, 2022—a collaboration between FCMAT and School Services of California Inc.—that provides a brief overview of the web-based SACS software, and dives deep into the completion of the necessary forms for Estimated Actuals and Adopted Budget, including the Criteria and Standards report. This training is intended to provide users with a “how-to” and best practices as they wade through the myriad forms necessary, and should be viewed as complementary, not as a replacement or alternative, to the COE trainings. More information on the collaborative webinar is available [here](#).



# Expanded Learning Opportunities Program

## Audit Penalties based on 2022-23 Governor’s Budget Trailer Bill

The proposed amendments to *Education Code* Section 46120 in the Governor’s Budget trailer bill language would delay the annual audit of the Expanded Learning Opportunities (ELO) Program to 2023-24, and define proportionate audit penalties for failure to offer the program, provide access to the program, or meet the day and/or hour requirements.

### Penalty for failure to offer the program

LEAs equal or above 75% UPP that receive the higher funding rate will be required to offer the ELO Program to all TK/K-6 students in classroom-based instructional programs; LEAs below 75% UPP that receive the lower funding rate will be required to offer the ELO Program to all unduplicated students in TK/K-6 classroom-based instructional programs.

The penalty calculation for failure to meet the offering requirement will be a proportionate entitlement reduction based on the number of students the LEA did not make the offering compared to the entire population of students that the LEA was required to make the offering.

Example:

LEA Funding Rate	Offering Requirement	Offering Requirement (Number of Students)	Actual Offering (Number of Students)	ELO Program Penalty Factor
Rate 1 (LEA =>75% UPP)	All TK/K–6 classroom-based students	1,500 (All students)	1,400	0.9333
Rate 2 (LEA >75% UPP)	All TK/K–6 classroom-based unduplicated students	750 (UPC)	725	0.9667

In the example above, if the Rate 1 LEA received a \$500,000 entitlement in 2023-24, the revised entitlement would be \$466,650 ( $\$500,000 * 0.9333$ ), and the penalty would be \$33,350.

### Penalty for failure to provide the program

LEAs equal or above 75% UPP that receive the higher funding rate will be required to provide access to the ELO Program to all TK/K-6 students in classroom-based instructional programs whose parent or guardian requests it; LEAs below 75% UPP that receive the lower funding rate will be required to provide access to the ELO Program to 50% of unduplicated students in TK/K-6 classroom-based instructional programs.

The penalty calculation for failure to meet the access requirement will be a proportionate entitlement reduction based on the number of students the LEA did not provide access to the program compared to the entire population of students that the LEA was required to provide access to the program.

Example:

LEA Funding Rate	Provide Access Requirement	Provide Access Requirement (Number of Students)	Actual Access Provided (Number of Students)	ELO Program Penalty Factor
Rate 1 (LEA =>75% UPP)	All TK/K–6 classroom-based students upon parent/guardian request	1,250 (All students whose parent/guardian requested program)	1,100	0.8800
Rate 2 (LEA >75% UPP)	50% of TK/K–6 enrolled classroom-based unduplicated students	375 (50% of UPC)	260	0.6934

In the example above, if the Rate 1 LEA received a \$500,000 entitlement in 2023-24, the revised entitlement would be \$440,000 ( $\$500,000 \times 0.8800$ ), and the penalty would be \$60,000.

### Penalty for Hours and/or Days Short

The ELO Program must be operated on all school days, plus at least 30 non-school days, during intersessional periods.

The following table displays the ELO Program annual day requirements for school districts and charter schools. The factor that will be used in the penalty calculation is based on the percentage value of one ELO Program day. The factor will be used to determine the audit penalty for failure to offer the combined 9 hours of instructional time and expanded learning time on any instructional day, or 9 hours of expanded learning time on 30 intersession days.

LEA Type	Annual Instructional Day Requirement	ELO Program Intersession Requirement	Total ELO Program Annual Day Requirement	ELO Program Penalty Factor (equals 1 day)
School District	180	30	210	.0048
Charter School	175	30	205	.0049

Example of a penalty calculation for a school district that receives \$500,000 in 2023-24 for the ELO Program, and failed to meet the 9-hour combined instructional time and ELO time on 5 days:

- Formula:  $\$500,000 \times 0.0048 \times 5 = \$12,000$



## 2022-23 Proposed Changes to Net Charter Shift

### Current Law:

Under current law, districts are funded on the greater of current year or prior year ADA. Prior year ADA for students transferring between a school of the district and a district-sponsored charter school must be reported to CDE, as this data is used to adjust a district's prior year ADA and avoid double-funding ADA.

If the amount of prior year ADA generated by students that transferred to a district-sponsored charter school is greater than the amount of ADA generated by students that transferred to a school of the district, the difference (net charter shift) results in a decrease to the district's prior year ADA. Conversely, if more students are transferring to a school of the district, no adjustment is made.

For example, if five students transfer to a district-sponsored charter school, and one student transfers to a school of the district, the district's prior year ADA will be decreased by four (assuming each student has perfect attendance).

### Proposed TBL Changes:

The 2022-23 Governor's Budget proposes a significant change to declining enrollment protection for school districts. In addition to being funded on the greater of current or prior year ADA, districts may be funded on the average of ADA from the three most recent prior years. As a result, amendments to net charter shift in *EC 42238.051* have been proposed to accommodate the new declining enrollment mechanism. The bullet points below highlight the major changes should the proposal be adopted as written:

- Commencing with FY 2024-25, school districts must report up to three years of ADA for students that transfer between a school of the district and a charter school sponsored by the district.
  - For students attending a school of the district in the current year, any ADA that student generated at a sponsored charter school in any of the three prior years must be reported.
  - For students attending a sponsored charter school in the current year, any ADA that student generated at a school of the district in any of the three prior years must be reported.
- Net charter shift reporting for each of the three prior years will phase in over time, as this data was not collected in 2020-21 or 2021-22.
  - **2022-23:** Report prior year (2021-22) ADA for net charter shift
  - **2023-24:** Report prior year (2022-23) and second prior year (2021-22) ADA for net charter shift
  - **2024-25:** Report prior year (2023-24), second prior year (2022-23), and third prior year (2021-22) ADA for net charter shift
- The net charter shift adjustment is no longer capped at zero for the school district. If there are more students transferring to a school of the district than are transferring to a sponsored charter school, the school district will receive a positive adjustment to prior year ADA.
- The statute pertaining to prior year adjustments resulting from charter schools converting back to a school of the district has been stricken, as this scenario is now covered by positive net charter shift adjustments.

### Proposed Net Charter Shift Example:

Student C attended a school of the district for three years, and transferred to a charter school sponsored by the district in the current year.

Prior year ADA generated by Student C is reported to CDE, and reduces prior year ADA for the purpose of determining the greater of current, prior, or prior year average ADA.

Prior Year ADA				Current Year ADA	
District Pupils	3PY	2PY	PY	District Pupils	CY
Student A	1.00	0.90	0.80	Student A	0.70
Student B	1.00	0.90	0.80	Student B	0.70
Student C	0.70	0.80	0.90		

  

District Pupils	3PY	2PY	PY	Charter Pupils	CY
Student D	1.00	1.00	1.00	Student C	1.00
				Student D	1.00

### Net Charter Shift Reporting in Current Year

Shift ADA	3PY	2PY	PY
Transfer to Charter School	0.70	0.80	0.90
Transfer to District School	-	-	-
<b>Total Net Charter Shift</b>	<b>(0.70)</b>	<b>(0.80)</b>	<b>(0.90)</b>

### Prior Year ADA Adjustments

ADA	3PY	2PY	PY
Prior Year ADA	2.70	2.60	2.50
Net Charter Shift	(0.70)	(0.80)	(0.90)
<b>Adjusted Prior Year ADA</b>	<b>2.00</b>	<b>1.80</b>	<b>1.60</b>

### Greater of Current, Prior, or Three Prior Year Average ADA

ADA Metric	Total
Current Year ADA	1.40
Prior Year ADA	1.60
Three Prior Year Average	1.80 *
<b>Total Funded ADA</b>	<b>1.80</b>

\*Prior Year Average ADA is calculated after net charter shift adjustments have been applied.

# NewsBreak

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2022-07

## Top 2022 Legislative Bills to Watch; Update to Cal/OSHA Emergency Temporary Standards

March 3, 2022

*Sara Bachez and Elizabeth Esquivel*

The California Legislature has introduced 2,113 measures since session resumed on January 3, 2022. On February 24, 2022, CASBO's Legislative Committee deliberated on the first round of legislative proposals, and this report highlights the major issues and positions.

### [AB 1607 \(Muratsuchi\): Education finance: Local Control Funding Formula](#)

[\(LCFF\)](#). Starting with the 2022-23 school year, this bill would calculate average daily attendance (ADA) for school districts based on a three-year average for the current fiscal year and each of the previous two fiscal years. The bill would also add \$4.2 billion (half of the estimated Proposition 98 increase) into the LCFF above the statutory cost of living adjustment (COLA) for the 2022-23 budget year, with the intent that the Legislature strive to reach the top 10 states in the country in K-12 per-pupil spending. Out of the additional \$4.2 billion above the estimated 2022-23 COLA, the base rates would increase by about \$3.4 billion so every district will benefit from this measure. In addition to the base grant increases, this measure would provide increases to the supplemental and concentration grant by roughly \$750 million each.

### [AB 1607 Fact Sheet](#)

CASBO Position: Watch

Staffer: Sara Bachez

[AB 1614 \(Muratsuchi\): Education finance: LCFF: base grants: aspirational funding level: reports](#). This bill would add \$4.2 billion into the current base grant funding, using the existing LCFF, for the 2022-23 budget year, with intent language that the Legislature strive to reach the top 10 states in the country in K-12 per-pupil spending. Commencing with the 2022-23 fiscal year, a base grant of:

- \$9,989 for ADA in grades K-3
- \$9,184 for ADA in grades 4-6
- \$9,457 for ADA in grades 7 and 8
- \$11,245 for ADA in grades 9-12

[AB 1614 Fact Sheet](#)

CASBO Position: Support

Staffer: Andrea Ball

[AB 1667 \(Cooper\): California State Teachers' Retirement System \(CalSTRS\)](#). This bill states the intent of the Legislature to enact legislation related to the CalSTRS, including, among other things, in connection with employee liability for system errors in payments, guidance provided by the system later determined to be erroneous, changes to interpretations of creditable compensation laws by the system, and system audits. The bill intends to establish a process that promotes accuracy and transparency by:

1. Ensuring retired members are not held liable for prior overpayments, except in cases of "member error;"
2. Holding CalSTRS accountable for guidance later determined to be erroneous;
3. Requiring that CalSTRS regularly update an official guidance document governing employer reporting;
4. Clarifying that any changes to CalSTRS' interpretation of creditable compensation laws must be preceded by prior notice;
5. Requiring that CalSTRS publish all audit reports on their website; and
6. Ensuring that CalSTRS' appeal process allows all individuals impacted by an audit the right to appeal.

[AB 1667 Fact Sheet](#)

CASBO Position: Support

Staffer: Elizabeth Esquivel

[AB 1948 \(Ting\): Education finance: LCFF: low-income pupils: pupils experiencing homelessness](#). This bill would replace pupils who are eligible for free or reduced-price meals with low-income pupils and pupils experiencing homelessness in the categories

of pupils who are unduplicated pupils for purposes of LCFF. The bill would require pupils who are only English learners or low-income pupils, or pupils who only fall within both categories, to be counted only once. The bill would require pupils who are pupils experiencing homelessness or foster youth, or both, or who are also English learners or low-income pupils, or both, to be counted twice. Specifically, the bill considers a revised LCFF unduplicated pupil definition that would:

- Count unhoused students, count poverty, foster and homelessness status in an duplicated way;
- Raise the poverty threshold from federal school meals to a level closer to California’s Cal Grant eligibility levels: 250% federal poverty level (\$66,000 for a family of four); and
- Increase the LCFF base funding for all students by 10.66% — double the proposed COLA.

[AB 1948 Fact Sheet](#)

CASBO Position: Watch

Staffer: Andrea Ball

[SB 3 \(Caballero\): Education finance: Local Control and Accountability Plan \(LCAP\)](#)

[portal](#). This bill would require the California Department of Education (CDE) to develop, on or before July 1, 2023, an LCAP portal that will allow comprehensive analysis by policymakers of actions, expenditures and progress on metrics included within LCAPs adopted by local education agencies (LEAs). The bill would require the portal to include a tracking mechanism for school districts, county offices of education and charter schools to use to report the types of services on which they spend their supplemental and concentration grant funds. Commencing January 1, 2024, the bill would require LEAs to annually report to CDE the types of services on which they spend their supplemental and concentration grant funds using the portal developed by CDE.

[SB 3 Fact Sheet](#)

CASBO Position: Oppose

Staffer: Sara Bachez

[SB 579 \(Allen\): Education finance: LCFF](#). This bill would, for the 2022-23 fiscal year, require apportionments to LEAs under the LCFF to be calculated based on the greater of each LEA’s 2019-20, 2021-22 or 2022-23 ADA.

CASBO Position: Watch

Staffer: Sara Bachez

[SB 830 \(Portantino\): Education finance: supplemental education funding](#). This bill would define “average daily membership” as the quotient of the aggregate enrollment days for

all pupils in a school district or county office of education, from transitional kindergarten to grade 12, inclusive, as applicable, divided by the total number of instructional days for the LEA in an academic year. The bill, commencing with the 2023-24 fiscal year, would authorize a county office of education or school district to apply each fiscal year to the State Superintendent of Public Instruction for supplemental education funding. The bill would require an LEA to receive as supplemental education funding the difference between what the LEA would have received under the LCFF based on average daily membership and what the LEA received under the LCFF based on ADA for that fiscal year, as provided. For an LEA to be eligible for supplemental educational funding, the bill would require it to report to the State Superintendent on July 1 the average daily membership for the prior academic year and to demonstrate a maintenance of effort to address chronic absenteeism and habitual truancy, as provided. The bill would require LEAs use at least 50% of their supplemental education funding to supplement existing LEA expenditures to address chronic absenteeism and habitual truancy. The bill would condition implementation of these provisions upon the appropriation of funds for these purposes in the annual Budget Act or other statute.

[SB 830 Fact Sheet](#)

[Senator Portantino's press release](#)

CASBO Position: Oppose

Staffer: Sara Bachez

[SB 878 \(Skinner\): School transportation](#). Commencing January 1, 2023, this bill would require a pupil attending a public, non-charter school to be offered free transportation to and from their neighborhood school. The bill would require a school district, county office of education, entity providing services under a school transportation joint powers agreement, or regional occupational center or program that does not currently provide transportation to all pupils in the LEA to implement a plan to ensure that all pupils attending the LEA are offered free transportation to and from school. The bill would require these plans to be developed in consultation with specified stakeholders and would make all of these provisions operative only upon an appropriation of funds for these purposes.

[SB 878 Fact Sheet](#)

CASBO Position: Concern

Staffer: Elizabeth Esquivel

### **Other Bills to Watch**

[SB 871 \(Pan\): Public health: immunizations](#). The bill would prohibit the governing authority of a school or other institution from unconditionally admitting any person as a

pupil of any public or private elementary or secondary school, childcare center, day nursery, nursery school, family day care home, or development center, unless prior to their admission to that institution they have been fully immunized against COVID-19. This bill would also repeal Section 120338 of the Health and Safety Code, thereby removing the personal belief exemption from any additional immunization requirements deemed appropriate by the California Department of Public Health (CDPH).

[AB 1973 \(McCarty\): Education finance: base grants: adjustments: kindergarten: minimum school day.](#) This bill would require, commencing with the 2025-26 school year, as a condition of receiving that additional adjustment, a school district or charter school that offers a kindergarten program, to provide, at each school site that offers a kindergarten program, a minimum school day for the kindergarten day that is at least equivalent to the minimum school day provided for grades 1 to 3.

[AB 2774 \(A. Weber\): Education finance: LCFF: supplemental grants: lowest performing pupil subgroup or subgroups.](#) This bill would, commencing with the 2023-24 fiscal year, adjust the definition of “unduplicated pupils” to include pupils who are included in the lowest performing subgroup or subgroups, based on the most recently available mathematics or language arts results on the California Assessment of Student Performance and Progress. The bill would also require the State Superintendent to annually identify the lowest performing pupil subgroup or subgroups and would authorize school districts and charter schools to review and revise their submitted data on pupils who are included in the lowest performing subgroup or subgroups.

[AB 2573 \(McCarty\): Certificated school employees: probationary employees.](#) This bill would require a certificated employee of a school district or a county superintendent of schools, regardless of the ADA of the school district or county superintendent of schools, who completes two consecutive school years and is so re-elected, to become and be classified as a permanent employee.

To learn more about the CASBO Governmental Relations areas of responsibility, click [here](#).

### **Updates to Cal/OSHA Emergency Temporary Standards**

On February 28, 2022, Governor Newsom issued an [executive order](#) to update the Division of Occupational Safety and Health (Cal/OSHA) COVID-19 Emergency Temporary Standards (ETS) to align with the updated state’s public health guidance. The order suspends the general masking requirement for those who are fully vaccinated, and instead requires employers to now follow orders from [CDPH](#) or local health departments.

The Safe Schools Team also has provided the following clarification on masking requirements on school transportation systems:

What are the implications of recent changes to CDC and CDPH masking guidance for transportation on school buses serving K-12 populations?

- 
- School buses serving K-12 populations are considered a school setting and accordingly, masking remains required through March 11, 2022, after which time masking will be strongly recommended.
- After March 11, 2022, the following [CDC statement regarding the Requirement for Face Masks on Public Transportation](#) will be relevant in California: “CDC is exercising its enforcement discretion to not require that people wear masks on buses or vans operated by public or private school systems ... CDC plans to amend its Mask Order as soon as practicable to not require that people wear masks while outdoors on conveyances or while outdoors on the premises of transportation hubs, and to not require that people wear masks on buses or vans operated by public or private school systems.”
- Additionally, as is always the case: (1) state requirements and recommendations are subject to change; and (2) local health agencies and/or educational authorities may have additional requirements beyond state and federal requirements.
- When practicable and safe, CDPH recommends optimizing air quality on school buses by opening windows to create more ventilation.

**In Other News: California Public Employees’ Retirement System (CalPERS) Annual Survey**

CalPERS is seeking input from stakeholders regarding their communications, operations, strategies to handle risk, and overall level of confidence in their ability to fund benefits, and more. You can take their annual stakeholder survey [here](#). These results are shared in aggregate with the CalPERS board in the summer and help to guide efforts for the coming year. Please complete by March 10, 2022.



[Click Here for COVID-19 Related Resources](#)

## FISCAL REPORT

*PUBLIC EDUCATION'S POINT OF REFERENCE FOR MAKING EDUCATED DECISIONS*

### Top Legislative Issues—March 4, 2022

 [BY SSC GOVERNMENTAL RELATIONS TEAM](#)

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Neither the Senate Education Committee, chaired by Senator Connie Leyva (D-Chino), nor the Assembly Education Committee, chaired by Assemblymember Patrick O'Donnell (D-Long Beach), have held a policy committee hearing since the February 18, 2022, bill introduction deadline. The Senate Education Committee will hold its first hearing on 2022 bills next Wednesday, March 9, 2022, while the Assembly Education Committee has yet to schedule its first hearing to consider bills introduced this year.

The reason that neither education committee has yet to hear any 2022 bills is because only the earliest of this year's bills have met the requirement to be in print for 30 days before receiving a policy committee hearing. Numerous bills will start being amended over the next several weeks since they were introduced as "spot bills" and must have some substance before being referred to a policy committee.

The education policy committees' agendas will be picking up over the next month and a half as hundreds of education bills that have fiscal implications will need to be approved in policy committees by April 29, 2022; bills without fiscal effects will have an additional week to meet that deadline.

To jump to certain topics, click on any of the appropriate links below:

- [Early Childhood Education](#)
- [Employees](#)
- [Facilities](#)
- [Governance and District Operations](#)
- [Instruction](#)
- [Local Control Funding Formula](#)
- [Special Education](#)

## Early Childhood Education

**Assembly Bill (AB) 2806 (Rubio, D-Baldwin Park)—State Preschool Programs: Suspension and Expulsion.** As introduced, AB 2806 would prohibit providers of State Preschool Programs from expelling or persuading or encouraging a parent to voluntarily unenroll any child from a program because of a child’s behavior. The bill establishes required procedures and timelines in order to unenroll a child for behavioral reasons. Additionally, the bill prohibits State Preschool Program providers from suspending or persuading or encouraging a parent to prematurely pick up any child from a program because of a child’s behavior and establishes that suspending a child shall only be used as a last resort.

The bill authorizes reimbursement for early mental health services if providers meet specified criteria.

## Employees

**AB 2573 (McCarty, D-Sacramento)—Certificated School Employees: Probationary Employees.** This bill would change the process for obtaining permanent status for certain certificated employees, including the following:

- A probationary employee employed in an assignment that is less than full time and who, in any one school year, has served for at least 75% of the number of days required of the assignment in which the employee is employed is deemed to have served a complete school year
- A probationary employee of an adult education program is deemed to have served a complete school year if the employee serves for at least 75% of the hours constituting a full-time equivalent position for adult education programs in the school district
- Service by an instructor at regional occupational centers or programs are included in computing the service required for classification as a permanent employee
- Removes the layoff process exemptions that apply for school districts and county offices of education with average daily attendance (ADA) of less than 250 students

**SSC Comment:** This is a reintroduction of last year’s AB 388 (Medina), which failed passage in the Senate Appropriations Committee.

## Facilities

**AB 2162 (Mullin, D-South San Francisco)—School Facilities, Good Repair.** As introduced, AB 2162 would add that, with respect to the requirement to maintain school facilities in good repair, that heating, ventilation, and air-conditioning systems are tested for their ventilation rates after initial installation and annually thereafter through a pitot traverse of the exhaust duct or equivalent measurements. The bill would also require that records of inspection be maintained for at least five years.

## Governance and District Operations

**AB 2355 (Salas, D-Bakersfield)—School Cybersecurity.** This bill would require a local educational agency (LEA) to report any cyberattack to the California Cybersecurity Integration Center. The bill would require the LEA to notify the parent or legal guardian of a pupil that a cyberattack has occurred if records pertaining to the pupil may have been accessed. The bill would require the California Cybersecurity Integration Center to establish a database that tracks reports of cyberattacks submitted by LEAs.

## Instruction

**AB 2507 (McCarty, D-Sacramento)—Pupil Instruction: The Universal Afterschool Program.** This bill would rename of the Expanded Learning Opportunities Program to the Universal Afterschool Program and would change references to “expanded learning opportunity programs” to “afterschool programs” instead. The bill would define “afterschool program” as a program of expanded learning opportunities that is offered to pupils before school, after school, both before and after school, in the summer, or during intersession. The bill would also clarify that “afterschool program” does not mean an extension of instructional time.

**SSC Comment:** This bill would not make any changes to the funding allocation formula for the Expanded Learning Opportunities Program. The bill simply looks to amend several definitions within the program.

## Local Control Funding Formula

**AB 2774 (Weber, D-San Diego)—Supplemental Grants: Lowest Performing Pupil Subgroup or Subgroups.** This bill would, beginning with the 2023-24 fiscal year, adjust the definition of “unduplicated pupils” to also include students that are identified as the lowest performing subgroup or subgroups based on the most recently available California Assessment of Student Performance and Progress (CAASPP) math and English language arts scores. The bill would require the State Superintendent of Public Instruction (SSPI) to annually identify the lowest performing pupil subgroup or subgroups. For the 2023-24 fiscal year, the bill would direct the SSPI to use the 2019 CAASPP results. The bill clarifies that the identification of this subgroup would exclude students already identified as an “unduplicated pupil” and student with disabilities.

**SSC Comment:** This is the exact same bill that Assemblymember Weber’s mother introduced in 2018 that, through a compromise with the Brown Administration and the Legislature, turned into the Low-Performing Students Block Grant in the 2018-19 State Budget.

**AB 2924 (O’Donnell, D-Long Beach)—Base Grants: Adjustments: Reduced Class Size.** Under current law, the K-3 grade span base grant is adjusted by 10.4% for school districts that maintain or make progress toward an average class enrollment of not more than 24 pupils for each school site.

This urgency bill (take effect immediately upon signature) would instead require, commencing with the 2022-23 fiscal year, the 10.4% adjustment to be applied to the K-3 base grant, grades 4-6 base grant, and the grades 7-8 base grant for a school district or charter school that maintains an average class enrollment of no

more than 24 pupils for each school site, unless a collectively bargained alternative ratio is agreed to by the school district or charter school.

**SSC Comment:** Due to the disruption of COVID-19 on public education over the past two years, Assemblymember O'Donnell claims that learning loss has led to reduced student achievement and in order for students to benefit from smaller class sizes this bill is necessary and should take effect beginning in 2022-23.

**Senate Bill (SB) 997 (Pan, D-Sacramento)—Local Control and Accountability Plans: Parent Advisory Committee: Student Advisory Committee.** This bill would require the governing board of a school district to either include at least two pupils as full members of the Local Control and Accountability Plan (LCAP) parent advisory committee or to establish a student advisory committee to provide advice to the governing board and the superintendent regarding the LCAP.

## Special Education

**AB 2427 (Rubio)—Individualized Education Programs: Postsecondary Goals and Transition Services.** This bill would reduce the minimum age that an Individualized Education Program needs to include appropriate measurable postsecondary goals and transition services needed to attain those goals from 16 to 14 years old.

**SB 1016 (Portantino, D-La Cañada Flintridge)—Eligibility: Fetal Alcohol Spectrum Disorder.** This bill would require the State Board of Education to include “fetal alcohol spectrum disorder” under the definition of “other health impairment,” entitling those children to special education and related services.

[Click Here for COVID-19 Related Resources](#)

## FISCAL REPORT

PUBLIC EDUCATION'S POINT OF REFERENCE FOR MAKING EDUCATED DECISIONS

### Ask SSC . . . Transition Plan Back to In-Person Instruction

 [BY WENDI MCCASKILL](#)

 [BY PATTI F. HERRERA, EDD](#)

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posted March 7, 2022

**Q.** Does the requirement to have a plan to transition students from independent study back to a classroom within five instructional days apply to the 2022–23 school year?

**A.** Yes. Due to the requirement that independent study be a voluntary program, historically, annual audit procedures for independent study have directed auditors to verify that school districts and county offices of education have policies and procedures to ensure that any student who ends an independent study agreement could return *immediately* to in-person instruction. Changes to independent study law in effect beginning with the 2021–22 school year extended the time for local educational agencies (LEAs) to return a student to in-person instruction, at their request or the request of their parent(s) if under the age of 18, from an *immediate* obligation to five days. More specifically, Education Code Section 51747 now provides that LEAs' independent study board policies include a plan to transition students from independent study to in-person instruction in no more than five instructional days when their families wish to return to in-person instruction. This statutory change is ongoing.

[Click Here for COVID-19 Related Resources](#)

## FISCAL REPORT

*PUBLIC EDUCATION'S POINT OF REFERENCE FOR MAKING EDUCATED DECISIONS*

### Critical Deadlines and Funding Opportunities—March 3, 2022

 [BY CHARLENE QUILAO](#)

 [BY WENDI MCCASKILL](#)

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posted March 3, 2022

(New items, if any, are listed in bold so you can see at a glance what has been added.)

Critical Deadlines—Reporting or Action Dates	
Issue	Deadline
<ul style="list-style-type: none"> <li>• Second Interim (Actuals through January 31)               <ul style="list-style-type: none"> <li>◦ Charter school Second Interim due to chartering authority and County Office of Education (COE) (Education Code Section [EC §] 47604.33[a][4])</li> </ul> </li> </ul>	3/15/22
<ul style="list-style-type: none"> <li>• Second Interim (Actuals through January 31)               <ul style="list-style-type: none"> <li>◦ District Second Interim due to COE (also to the State Superintendent of Public Instruction [SSPI] and State Controller's Office [SCO] if qualified or negative) (EC § 42131[a][1] and [2])</li> <li>◦ COE Second Interim due to SSPI (EC § 1240[l][1][A] and [B])</li> </ul> </li> </ul>	3/17/22*
<ul style="list-style-type: none"> <li>• Second Interim Status Report               <ul style="list-style-type: none"> <li>◦ COE must notify SSPI and SCO of district Second Interim certifications (EC § 42131[c])</li> </ul> </li> </ul>	4/18/22*
<ul style="list-style-type: none"> <li>• District Qualified/Negative Interims               <ul style="list-style-type: none"> <li>◦ COE must report to SSPI and SCO on district qualified or negative Second Interim reports (EC§ 42131[a][2])</li> </ul> </li> </ul>	4/18/22*

\*Date calculated as prescribed in law.

Plan Deadlines		
Plan	Link to Plan Template/More Information	Deadline
A-G Completion Improvement Grant	TBD <a href="#">EC § 41590(f)</a>	Develop a plan by 4/1/22; discuss and adopt (two separate meetings) by TBD
Pre-Kindergarten Planning and Implementation Grant	<a href="https://www.cde.ca.gov/ci/gs/em/documents/finalupktemp.doc">https://www.cde.ca.gov/ci/gs/em/documents/finalupktemp.doc</a>	Consideration by local governing board by 6/30/22
Expanded Learning Opportunities Program Plan	<a href="https://www.cde.ca.gov/ls/ex/documents/elopplogplanguide.pdf">https://www.cde.ca.gov/ls/ex/documents/elopplogplanguide.pdf</a>	Approved in a public meeting and posted on the LEA's <sup>1</sup> website by TBD
ESSER <sup>2</sup> I, II, and III Quarterly and Annual	<a href="https://www.cde.ca.gov/fg/cr/anr/eporthelp.asp">https://www.cde.ca.gov/fg/cr/anr/eporthelp.asp</a>	Various— <a href="https://www.cde.ca.gov/fg/cr/reporting.asp">https://www.cde.ca.gov/fg/cr/reporting.asp</a>
GEER <sup>3</sup> I Quarterly and Annual	<a href="https://www.cde.ca.gov/fg/cr/anr/eporthelp.asp">https://www.cde.ca.gov/fg/cr/anr/eporthelp.asp</a>	Various— <a href="https://www.cde.ca.gov/fg/cr/reporting.asp">https://www.cde.ca.gov/fg/cr/reporting.asp</a>

<sup>1</sup>Local Educational Agency

<sup>2</sup>Elementary and Secondary School Emergency Relief Fund

<sup>3</sup>Governor's Emergency Education Relief

Funding Opportunities (For program website, click program name.)		
Description	Amount	Deadline
<a href="#">Fresh Fruit and Vegetable Program</a>	Various	3/4/22
<a href="#">Individualized Education Program Facilitation Network—Request for Proposal</a>	Various	3/10/22
<a href="#">Foster Youth Services Coordinating Program Technical Assistance Provider</a>	\$1,387,000	3/15/22
<a href="#">Dual Language Immersion Grant (DLIG) Program</a>	Various	3/18/22
<a href="#">Early Education Teacher Development Grant</a>	Various	3/23/22
<a href="#">Family Empowerment Centers on Disability Grant</a>	Various	3/25/22
<a href="#">After School Education and Safety</a>	Various	3/30/22

<u><a href="#">After School Education and Safety Frontier Transportation Grant</a></u>	Maximum of \$15,000 per site per school year	3/30/22
<u><a href="#">Consolidated Application</a></u>	Various	3/31/22
<u><a href="#">Classified School Employee Summer Assistance Program Fiscal Year 2021-22</a></u>	Various	4/1/22
<u><a href="#">California Community Schools Partnership Program: Planning Grant</a></u>	Up to \$200,000	4/1/22
<u><a href="#">Migrant Education Program</a></u>	Various	4/6/22
<u><a href="#">California State Preschool Program Expansion (2021-22)</a></u>	Various	4/7/22
<u><a href="#">Federal Public Charter Schools Grant Program for Planning, Implementation, Replication, Expansion (2021-23)</a></u>	Various	4/14/22
<u><a href="#">Regional Technical Assistance and Coaching Sub-Grant (2022-23)</a></u>	\$431,333	4/18/22





## Workshop Spotlight - March 4, 2022

### UPCOMING WORKSHOPS

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Workshop	Date(s)	Locations
<u><a href="#">Federal Compliance: How to Stay Out of Trouble Webinar Series</a></u>	Mar. 8, 2022	Webinar
<u><a href="#">Charter Schools—A Webinar Series</a></u>	Mar. 22, 2022	Webinar
<u><a href="#">The Audit Challenge: Updates and New Considerations—A Webinar Series</a></u>	Apr. 5, 2022	Webinar

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<b><u>Employee Complaints and Investigations—A Webinar Series</u></b>	Apr. 12, 2022	Webinar
<b><u>SACS 101—Budget Development Webinar</u></b>	Apr. 19, 2022	Webinar
<b><u>The Mechanics of Universal TK: Staffing and Facilities Webinar</u></b>	May. 3, 2022	Webinar
<b><u>Construction Basics and Accounting—A Webinar Series</u></b>	May. 10, 2022	Webinar
<b><u>Employee Attendance and Leave Management Webinar Series</u></b>	May. 17, 2022	Webinar
<b><u>May Revision Workshop</u></b>	May. 20, 2022	Webinar

If you are interested in a topic, but are unable to attend the workshop, you can click on the workshop name and purchase the materials. SSC can also bring the workshop to your district or county office of education. Go to the [Workshop](#) page on our website and “Request A Workshop.”

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**Chief Business Official Exam**  
1 January 2021 - 30 June 2023



**2022 Payroll Essentials -**  
3/14/2022 - Twin Rivers USD  
14 - 16 March 2022



**Management & Supervision**  
101 - 3/18/2022 - Virtual  
18 March 2022



**Contracting With Confidence**  
- 3/22/2022 - Virtual  
22 March 2022



**Payroll Concepts -**  
3/25/2022 - Virtual  
25 March 2022



**2022 Annual Conference**  
Golf Tournament  
29 March 2022



**CASBO 2022 Annual**  
Conference & California  
School Business Expo  
30 March 2022 - 1 April 2022



**Payroll Concepts - 4/1/2022**  
- Merced COE  
1 April 2022



**Sell Your Strengths:**  
Marketing Techniques That  
Highlight Your Schools -  
4/6/2022 - Virtual  
6 April 2022



**2022 Payroll Essentials -**  
4/11/2022 - Orange County  
DOE  
11 - 13 April 2022



**Standardized Account Code**  
Structure: Basic Concepts -  
4/20/2022 - Virtual  
20 April 2022



**School Facilities & the CBO:**  
Best Practices in Planning  
for a Bond Measure -  
4/21/2022 - Virtual  
21 April 2022



2022 Transportation Leadership Academy - Southern CA  
22 April 2022 - 7 January 2023



In Person

Payroll Concepts - 4/22/2022 - SJ COE  
22 April 2022

Virtual



Presenter Led

Standardized Account Code Structure: Advanced Concepts - 4/29/2022 - Virtual  
29 April 2022

Virtual



Presenter Led

CalSTRS/CalPERS: Retirement Concepts - 5/2/2022 - Virtual  
2 May 2022

Virtual



Presenter Led

Advanced Management & Supervision - 5/3/2022 - Virtual  
3 May 2022



2022 Payroll Essentials - 5/17/2022 - Virtual - Presenter-Led  
17 - 20 May 2022

Virtual



Presenter Led

School Facilities & the CBO: Financial & Legal Aspects of Facility Programs - 5/18/2022 - Virtual  
18 May 2022



CASBO Leadership Summit: Leading With Confidence  
20 May 2022

Virtual



Presenter Led

Personnel Management: Using Emotional Intelligence to Increase Performance & Engagement - 5/25/2022 - Virtual  
25 May 2022



2022 Transportation Leadership Academy - Northern CA  
26 August 2022 - 20 May 2023