

FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

CSIS California School Information Services



Annual Report 2017-18

Fiscal Crisis and Management Assistance Team

Michael H. Fine, Chief Executive Officer

*Mary C. Barlow, Administrative Agent
Office of Kern County Superintendent of Schools*

<http://www.fcmat.org>

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Foreword

Thank you for your interest in the Fiscal Crisis and Management Assistance Team's 2017-18 Annual Report. This report presents an overview of the activities of the FCMAT organization for the past fiscal year. The Annual Report also gives the FCMAT staff an opportunity to reflect on the accomplishments of the past year and establish priorities and services for the years ahead.

Speaking of services, one of the realities we have come to terms with is how we describe the variety of work we do. We have struggled for years to properly identify the California School Information Services (CSIS) as a subsidiary, division or other related organization within FCMAT. In fact, CSIS is a service of FCMAT, along with the tools we offer, workshops we present, help desk database we maintain, and our core management assistance. It is both simple in concept, and yet resounding. We are committed to build upon this idea as we move forward, defining and doing the work at hand.

Just as change is a constant in the fiscal and operation workings of California's educational agencies, FCMAT must adapt to changing needs in the field. One of those is a justified interest by state policy-makers in greater transparency and accountability of the finances of local educational agencies. Within the realm of fiscal oversight, FCMAT provided policymakers with thoughts and ideas on opportunities to strengthen charter school authorization and oversight, transparency and oversight of district finances and early warning signs of fiscal distress that promote appropriately scaled intervention. This becomes even more important given the forecasted change in revenue trends in the near term, while many expenditure categories continue to trend in the opposite direction. Assisting LEAs with fiscal challenges is at the heart of our mission, and we will focus our efforts in this regard more and more.

Striking in our work last year was the near doubling of reviews we conducted in response to allegations of fraud, misappropriation of funds and other illegal fiscal practices. The normal number of such reviews conducted by FCMAT is four to eight per year, with a previous high of 10 audits in one year. FCMAT ended June with 18 extraordinary audits either completed or in progress during the preceding 12 months. In comments I've made around the state, I have described this increase as a symptom of a crisis in integrity.

This past year has been one of transition, and many plans have been laid for the months and years ahead. As the new year gets under way, we are getting ready to launch a new fiscal health risk analysis tool and our long-awaited Projection-Pro software application. New logos and designs for both CSIS and FCMAT will update our web presence and make us more accessible to our clients and the public. New features are being introduced within CALPADS, and the Standardized Account Code Structure (SACS) software replacement effort will gain full steam. And as noted above, we will be more involved in proactive and preventive services to fiscally distressed school districts.

We have never been more prepared to provide quality assistance to the field, and key to that is the outstanding FCMAT/CSIS staff that are working on behalf of the K-14 education community. The support of the FCMAT board and our public- and private-sector partners is essential to the success of our endeavors.



FCMAT Organization

In 1992, county offices of education were invited to apply to be the administrative agent for the Fiscal Crisis and Management Assistance Team. Four county offices submitted responses, and the Kern County Superintendent of Schools was chosen to be the administrative agent of FCMAT. A 25-member Board of Directors has statutory responsibility for a variety of decisions related to the Team, and is an active, engaged and important component of FCMAT.

FCMAT Agency

The team is headed by a Chief Executive Officer. All FCMAT staff members are employees of the Kern County Superintendent of Schools Office. FCMAT also provides oversight of the California School Information Services project, which is based in Sacramento.



Michael Fine joined FCMAT in 2015 as chief administrative officer, providing day-to-day supervision of operations. He was named chief executive officer effective July 1, 2017, succeeding Joel Montero.

Mike started his career in public education as director of fiscal services for the Newport-Mesa Unified School District and was assistant superintendent when he left that position in 2002 to work for the Riverside Unified School District. He served as the deputy superintendent of business and governmental relations from 2002-2015, and also as interim superintendent for the district in 2013-14.

Mike has a bachelor's degree in business administration from California State Polytechnic University, Pomona, and a master's degree in public administration from California Baptist University. He has a certificate of governmental and nonprofit accounting from the University of California, Riverside, and a certificate in school business management from

the Association of California School Administrators.

He brings a comprehensive knowledge of public traditional and charter school accounting, management and systems change to his position with FCMAT.

Administrative Agent

Dr. Mary Barlow was appointed as Kern County Superintendent of Schools (KCSOS) in 2017, after serving as associate superintendent for two years. She was elected to a new four-year term in June 2018. She provides leadership for the county office operated programs and the supporting divisions for 47 Kern County school districts serving more than 190,000 students.

Mary earned her bachelor of arts in psychology at CSU Bakersfield in 1994. She went on to earn her multiple subject teaching credential, a master's degree in educational management, and an Ed.D. in organizational leadership from the University of LaVerne.

Mary has served as a teacher, director of children and family services, and superintendent. During her tenure as superintendent of the Kernville Union School District, the district was named a California Distinguished School, Title I Academic Excellence District. She joined KCSOS in 2009 as the deputy administrative officer for FCMAT. In 2012, Mary was appointed as assistant superintendent of administration, finance & accountability for KCSOS.



She is a board member of the following organizations: California County Superintendents Educational Services Association, WestEd, Cross Agency Statewide System of Support, Association of California School Administrators (ACSA) Region XI, ACSA State Superintendency Council, California School Boards Association Superintendency Council, and the Region 8 Lead Educational Committee.

Mary serves her local community in a variety of capacities, including the Kern County Juvenile Justice Coordinating Council, the Kern Economic Development Council, the Kern County Network for Children, California Living Museum Foundation, and several other organizations.

FCMAT Board

Assisting FCMAT is a 25-member Board of Directors, composed of county and district superintendents representing 11 county office of education service regions, two community college representatives, and an administrator from the Department of Education. Other participants include a representative of charter schools and a representative from the California Collaborative for Educational Excellence. The board meets quarterly to set policies and billable rates and to monitor FCMAT's progress.

FCMAT Board Chair Mary Jane Burke began her career in education as an instructional assistant and has gone on to serve as a teacher, principal, special education director, assistant superintendent and deputy superintendent. In 1994, she was elected Marin County superintendent of schools and continues to serve in that office.



Mary Jane serves on the School/Law Enforcement Partnership, School to Career Partnership and the Marin Early Childhood Education Partnership. She has led efforts countywide to develop shared and collaborative services maximizing efficiency and the effective use of resources. Her office operates schools and a variety of programs for students as well as vital services to school districts and the community.

She is the past chair of the Marin County Treasury Oversight Committee for the county of Marin and is a past president of the California County Superintendents Educational Services Association. She is a longtime member of the FCMAT board of directors. Additionally, she serves as a member of the board of trustees of Dominican University of California.

FCMAT Background

FCMAT's Mission

The mission of the Fiscal Crisis and Management Assistance Team is to help California's local educational agencies fulfill their financial and management responsibilities by providing fiscal advice, management assistance, training and other related school business services. The Kern County Superintendent of Schools office is the administrative and fiscal agent for FCMAT, which operates within the context of several areas of the California Education Code, primarily those sections having to do with AB 1200 and AB 2756 oversight (EC 42127.1-.8, EC 41326, EC 41327).

Assembly Bill 1200 (AB 1200) created FCMAT in 1991. The team can assist county offices of education in understanding their fiscal monitoring duties as required by AB 1200, sometimes suggesting specific methods of carrying out the oversight responsibilities. FCMAT also provides management studies for school districts, county offices of education, charter schools and community colleges that request them. FCMAT develops and delivers statewide professional learning for school business officials.

The Role of FCMAT

Those who contributed to the formation of AB 1200 recognized that expanding the responsibility and authority of monitoring agencies was not enough. A statewide resource focusing on fiscal and management guidance was needed to assist monitoring agencies in the performance of their tasks and to assist educational agencies that request help in school business management and related areas. Therefore, AB 1200 called for the creation of a Fiscal Crisis and Management Assistance Team.

The mission of FCMAT is to help local educational agencies fulfill their financial and management responsibilities by providing expedient fiscal advice, management assistance, training and other related school business services. This can occur under several different circumstances. For example, if a county office reviews and disapproves a school district's annual budget, that county office may call upon FCMAT to examine the district's financial records, assist in developing an approvable budget and/or provide other operational recommendations that will ensure fiscal stability. In addition, FCMAT can respond directly at the request of a school district, county office, charter school or community college that may seek advice to improve management practices, business policies and procedures or organizational structure. The state, in its monitoring role, also can ask for FCMAT's assistance.

How FCMAT was Established

AB 1200 specified that one county office of education would be selected to administer the team. In the spring of 1992, all county offices of education were notified of the opportunity to apply to be the administrative agent for FCMAT. The selection, as required by law, was made by the Superintendent of Public Instruction and the Secretary of Child Development and Education.

The office of the Kern County Superintendent of Schools was selected to administer FCMAT and signed a contract with the governor's office to administer the team in June 1992. Overseeing the establishment and revision of policies for the agency is the FCMAT Board of Directors.

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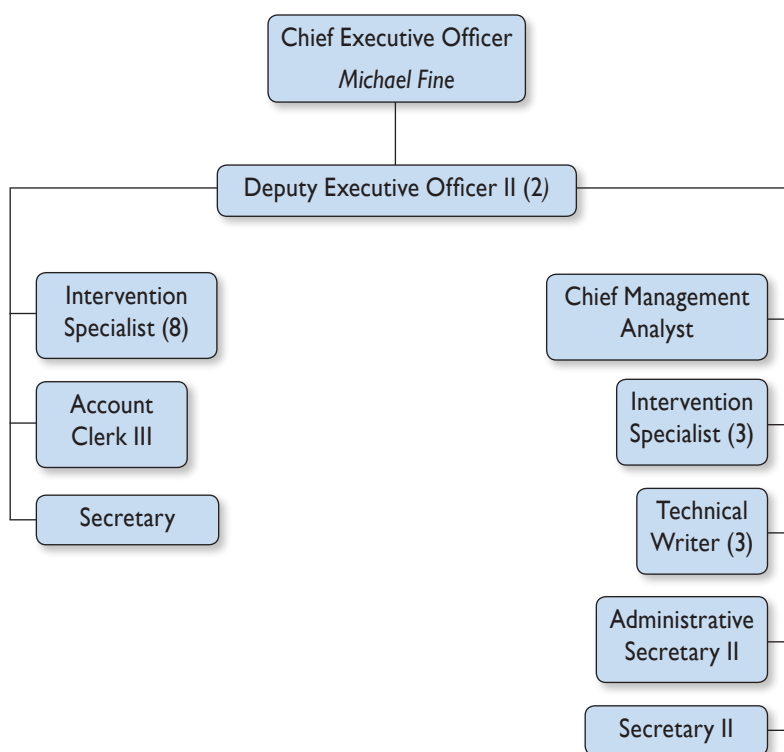
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Fiscal Issues in California Education

FCMAT's Chief Executive Officer annually delivers a status report to the education budget subcommittees of the state Legislature on the state of fiscal oversight and district solvency. This report focuses on the general fiscal health of local educational agencies (LEAs) and also attempts to identify continuing and emerging issues that will have a fiscal effect on California's school districts, county offices of education, community colleges and charter schools.

The issues identified below are some of those that may significantly alter the fiscal viability of California's school agencies both now and in future years. Issues that have been addressed here in previous years are now noted as continuing issues.

Continuing Issues

Fiscal Stability

The number of districts that certified qualified for the second interim reporting period of 2017-18 reflected a decrease from the respective numbers for the same period of 2016-17. Furthermore, the number of qualified districts dropped by 60% between the 2017-18 first interim and second interim report periods. This is a direct response to a more favorable January budget proposal by the governor (which was followed by even more positive funding commitments in the May Revision and the final Adopted Budget Act for 2018-19). The number of qualified certifications is directly related to the state budget, whereas the number of negative certifications (which has been flat over several years) is influenced by a variety of long-term issues in a district.

During the positive funding environment of the past five years, districts have had opportunities to resolve structural deficits. If structural deficits remain, the challenge to resolve the deficit and strengthen the district's fiscal stability will only grow. The projected increases in revenue from the Local Control Funding Formula (LCFF) will not completely mitigate potential insolvency issues in school districts as they align Local Control Accountability Plans (LCAPs) with resources and account for slowing revenue growth, increases in fixed expenses that are not tied to improved or expanded services, declining reserves, impacts from collective bargaining settlements and declining enrollment.

Without question, the increased employer contribution rates to the two pension systems that serve California schools is the greatest single fiscal challenge facing most LEAs. These rate increases have forced school agencies to annually readjust spending priorities. While every district has experienced a fiscal impact, most have handled it appropriately in their annual and multiyear financial plans, in part because the increases come during a time of increasing revenue – both recurring and one-time. However, as we look ahead to at least two more years of increased pension costs before the rate stabilizes, these future increases are not fully offset by projected growth in revenues.

CalSTRS rates may only be increased by the Legislature. However, the CalPERS board governs CalPERS rates. The rates are also influenced by investment and actuarial policies at both pension

systems. Many people hope that the new state administration will take a fresh look at the unfunded pension liability and the cost sharing structure. While the new administration was not a party to the last reform measure that introduced the higher contribution rates, the basic economic and mathematical considerations of the last agreement have not changed, leaving few alternatives to weigh.

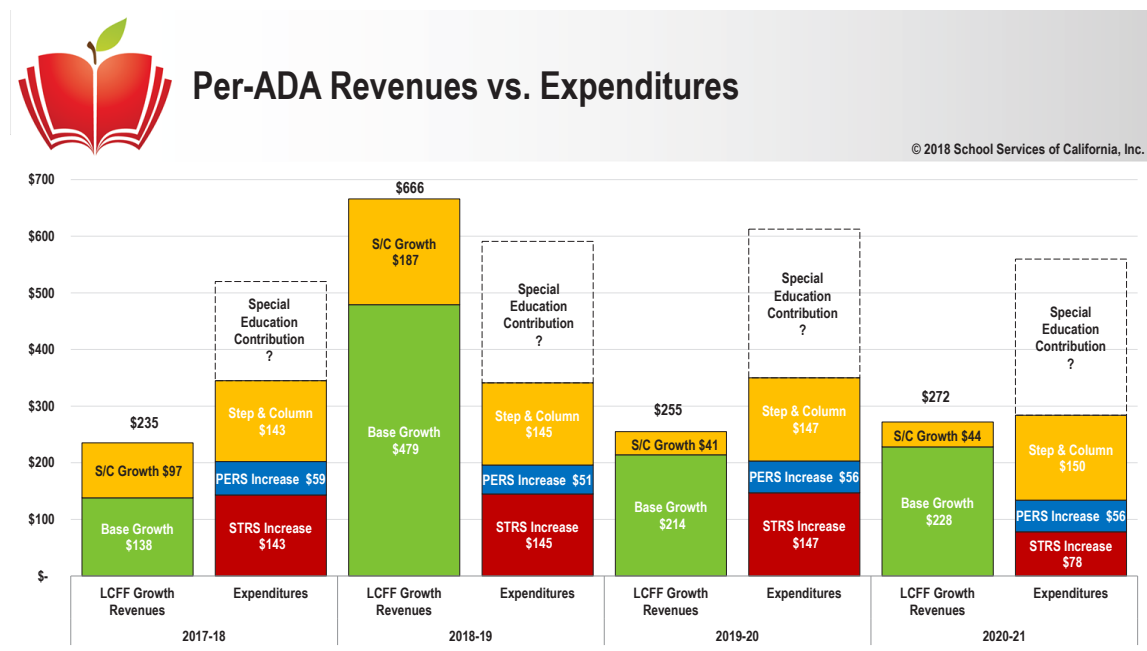
Concerns around fiscal solvency have led state policy makers to ask FCMAT to be more involved in proactive and preventive services to fiscally distressed school districts. To that end, our work in 2018-19 will be highly focused on monitoring and analyzing the fiscal risks in many districts.

Transition Period

As opined for the last few years, school funding is in a transition period. Transition years create anxiety around uncertainties. General economic indicators continue to be strong well past the traditional point of recovery in the economic cycle. Despite continued growth, significant risks are looming, and LEAs should approach their multiyear planning conservatively. This transition clearly began two years ago, with projections around state revenue changing between adopted budget, the Governor's January proposal, May Revision and the final budget. This same pattern continued last year with substantial increases in revenue over what was originally projected. Our economy is dynamic and the state budget is very reactive to those dynamics, creating levels of uncertainty as we plan for the future.

The massive effort to restore funding to schools lost during the great recession is complete. As such, year-over-year revenue gains to schools will begin to slow in 2019-20 and forward, with projected increases tied only to cost of living adjustments. It is becoming increasingly clear that the recent Proposition 98 boom years are over, and the best year for revenue growth is no longer in front of us but has passed.

In very simple terms, revenue growth at the local level will be outpaced by expenditure growth. Expenditure growth will be driven by external variables that the LEA has little control over. These include the aforementioned impacts of the CalSTRS and CalPERS employer contribution rate increases, automatic step and column salary increases, health care cost increases where hard caps do not exist, higher contributions to special education and impacts from declining enrollments that continue to plague more than half of all districts. The chart below by our colleagues at School Services of California graphically demonstrates this dilemma using only CalSTRS, CalPERS, step and column and special education impacts. Expenditures are projected to outpace revenues in both out years.



Source: School Services of California (used with permission)

Multiyear projections take a back seat during periods of economic expansion. Now is the time for business offices to reinvest in the time and details it takes to prepare meaningful multiyear financial projections (MYFP). It is also time for LEAs' executive management and policy makers to pay attention to the MYFP and how their decisions affect the MYFP model.

LEAs need to be cautious about their current and multiyear projections, keeping all available options open and planning with flexibility in mind. While the commitments made to the community in the LCAP should be retained, adjustments can be made in magnitude, time and impact.

Emerging Issues

Transition in State Administration

While the leading candidates for governor have indicated their support for the basic ideals of the LCFF, the devil is always in the details. The potential for change in the LCFF and LCAP post-Gov. Brown remains real and adds to uncertainty as we look at out-year commitments. Even without specific funding changes, a different approach with legislative leaders around policy priorities, the use of categorical programs to support these priorities and pension funding can all have material impacts on districts – good and bad. Remember that the state budget is no longer just about money but has become the vehicle to implement major policy revisions.

Data, Data, Data

Repeating the research initially conducted and released in 2007, *Getting Down to Facts II* is expected to release 36 reports and 20 briefs by more than 100 researchers. The reports, expected in October, will take deep dives on a variety of topics related to California's education system. The important topic of data will be among them. All elements of the state's new accountability system depend on quality data. FCMAT/CSIS is privileged to be part of the state's efforts to collect and report data about schools through CALPADS. With that insider's perspective we believe so much more can be done on this topic to improve accuracy, integration with other data, access by a host of stakeholders, cost effectiveness and support for LEAs.

About data, we can never say it enough times: The emphasis on data quality has never been more important. It drives LEA funding and the discussion surrounding LEA performance more than ever before.

Funding will certainly be among the topics studied, along with early childhood education, special education, student achievement, charter schools, student well-being, and teacher preparation and retention. All of these are elements that FCMAT sees LEAs struggle with every day. It is expected that this new round of research will prompt many important conversations and help policy makers set further direction.

FCMAT Strategic Plan

The 2013-14 State Budget Act included the Local Control Funding Formula (LCFF), which significantly changed the way LEAs are funded. The LCFF replaced revenue limits and most state categorical program funding with grade span adjusted base grants and supplemental and concentration grants determined by the number of unduplicated students who are English learners, foster youth, and/or eligible for free or reduced-price meals. The 2018-19 State Budget Act includes full implementation of the LCFF, two years earlier than originally anticipated.

Due to budget reductions from prior years and increased ongoing costs, including significant employer contribution rate increases for CalSTRS and CalPERS, LEAs throughout the state continue to struggle to eliminate deficit spending, maintain a balanced budget in the current and subsequent fiscal years, and sustain the recommended reserves for economic uncertainties and the cash balances necessary to maintain financial solvency. Educational services necessary for the state's K-14 student population have become more complex and costly, and experienced chief business officials and central office staff are more essential than ever for LEAs.

As these issues continue to confront LEAs, FCMAT is positioned to provide efficient, cost-effective assistance. The FCMAT organization continues to evolve to meet the increased demand for services. Management assistance, consisting of LEA reviews and written reports for numerous operational areas, continues to be a fundamental FCMAT responsibility and will remain an integral service. At the same time, FCMAT has increased its offerings to LEAs for professional and product development opportunities.

FCMAT's clientele urgently need the hands-on skills and tools to construct and maintain a solid operational infrastructure to support the best possible environment for student learning. FCMAT staff members possess top-level skills in school finance and other specialized operational areas and provide high-quality support to K-14 education. As public education changes and evolves through the legislative process, FCMAT strives to anticipate these changes and adjust its services accordingly by positioning its resources and setting goals to meet the needs of LEAs.

The Kern County Superintendent of Schools (KCSOS) operates as FCMAT's administrative agent, and FCMAT endeavors to support and enhance the goals of KCSOS and K-14 education statewide. This is evidenced in FCMAT's efforts to address its primary mission of assisting K-14 public school agencies in identifying, preventing, and resolving their financial and operational issues while providing an array of core services. The leadership and guidance of the FCMAT board also helps to shape and define FCMAT's goals and objectives.

FCMAT participated in the KCSOS 2015-18 strategic planning process and developed its objectives and action steps to align with the following KCSOS goals:

1. Improve student growth, achievement and accountability
2. Maximize service to clients and improve access to resources
3. Maintain a cohesive, productive and stable workforce

4. Maintain fiscal stability, integrity and accountability
5. Provide responsive leadership as a community partner

The following FCMAT objectives and action steps that support the goals were presented to KCSOS in June 2015:

Objective: Develop and implement updated software products to continue to support staff and local educational agencies.

Action Steps:

Develop and implement Microsoft SharePoint Office 365 to improve staff productivity and efficiency.

Develop specifications and a request for proposals to update Budget Explorer MYFP software and provide access to all K-12 local educational agencies.

Update or replace the Job Management System (JMS) to meet current needs.

Objective: Update FCMAT's comprehensive review process and standards as necessary, for use with local educational agencies that require a future emergency state appropriation, to ensure the most beneficial process for clients and that the standards are current and relevant.

Action Steps:

Obtain input from staff regarding potential changes to the comprehensive review process.

Provide information to the state administration and FCMAT board regarding potential changes to the comprehensive review process.

Obtain input from staff regarding necessary changes to the comprehensive review standards.

Provide information to the state administration and FCMAT board regarding potential changes to the comprehensive review standards.

Objective: Provide professional development opportunities that equip both FCMAT staff and those we support in the educational field with the skills, knowledge, and strategies needed to assist in maintaining fiscal solvency and accountability, as well as maximize knowledge of emerging topics.

Action Steps:

Make decisions about FCMAT's professional development offerings through needs assessments, feedback and evaluations.

Encourage broad-based ownership of professional development by involving all FCMAT staff in both internal and external trainings.

Integrate additional professional development opportunities into FCMAT's structure by including responsive trainings as the needs of our staff and LEAs continue to evolve.

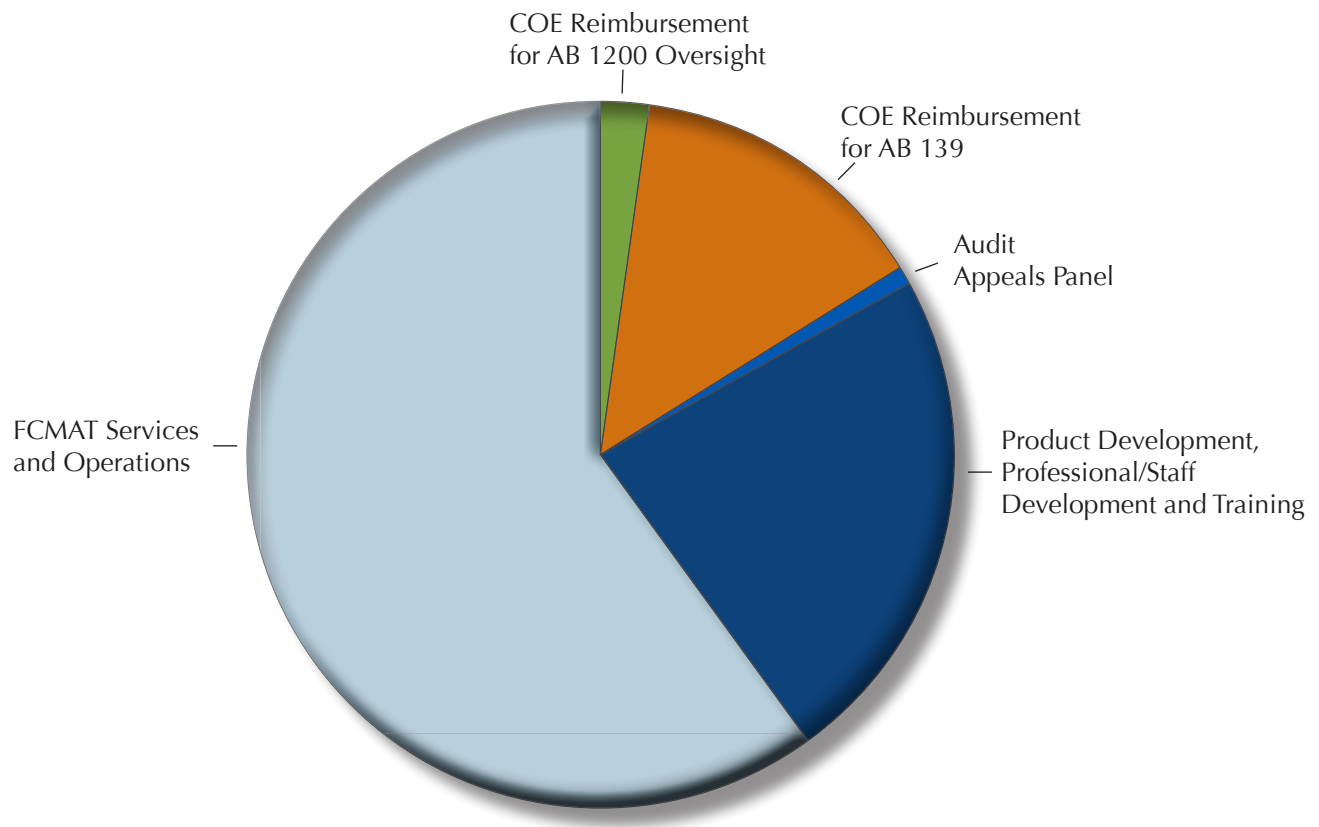
Partner with outside agencies whenever possible to offer professional development in a way to expand our audience.






FCMAT has made significant progress in achieving these objectives and action steps, including: implementation of Microsoft SharePoint Office 365; the projected release of Projection-Pro in the first quarter of 2019 to update and replace Budget Explorer MYFP software; submission of proposed revisions for the comprehensive review process and standards to the CDE; and implementation of expanded and increased professional development offerings statewide.

FCMAT Appropriations for Fiscal Year 2017-18

FCMAT Appropriations **\$4,123,000**

FCMAT Flow-Through **\$802,000**



	FCMAT Services and Operations	\$2,944,000	
	Product Development, Professional/Staff Development and Training	\$1,137,000	
	Audit Appeals Panel	\$42,000	
	COE Reimbursement for AB 139	\$687,000	(flow-through)
	COE Reimbursement for AB 1200 Oversight	\$115,000	(flow-through)

Year in Review

Partnership with the Educational Community

FCMAT provides proactive and preventive management assistance to districts, county offices, charter schools and community colleges in managing their operations. Management assistance requests from these entities represented approximately 79% of FCMAT's fieldwork in 2017-18. Additionally, the state Legislature and county superintendents of schools can assign FCMAT into a local educational agency (LEA). These assignments are typically for fiscal crisis intervention and AB 139 (fraud audit) work and represented approximately 21% of FCMAT's studies in 2017-18. Legislation in 2006 made FCMAT services available to charter schools and community colleges, expanding FCMAT's role in providing assistance to local educational agencies, K-14.

In addition to their primary work of educating students, California's LEAs handle business services, purchasing, technology, facilities, food services, transportation, and personnel. These various functions or services all affect the delivery of educational programs and are essential for success. The challenge for districts, county offices and other LEAs is to minimize the cost of these services to maximize the resources available to support instruction.

During 2017-18 FCMAT handled 88 fiscal crisis intervention and management assistance reviews (including one comprehensive assessment) for districts, county offices, charter schools and community colleges throughout the state. This number includes the AB 139 studies conducted during the fiscal year. The types of reviews performed in each of 14 major categories in the 2017-18 fiscal year is shown on page 26.

FCMAT has been assigned to review a number of school districts that required emergency state loans to continue to operate, and has been required to conduct comprehensive assessments of these districts in five operational areas: Community Relations and Governance, Pupil Achievement, Personnel Management, Financial Management and Facilities Management. FCMAT has developed recommendations and a recovery process to assist these districts in their return to local governance and fiscal solvency, and continues to be engaged with several of these districts in monitoring and reporting on the long-term recovery process.

Many monitoring agencies and the state Legislature continue to call on FCMAT as a statewide resource to assist in providing cost-effective services and products to California's public schools.

FCMAT continues to develop and/or update a number of publications and software tools to assist and guide LEAs in conducting their operations more effectively, and provides numerous training workshops to assist them in fulfilling their oversight responsibilities.

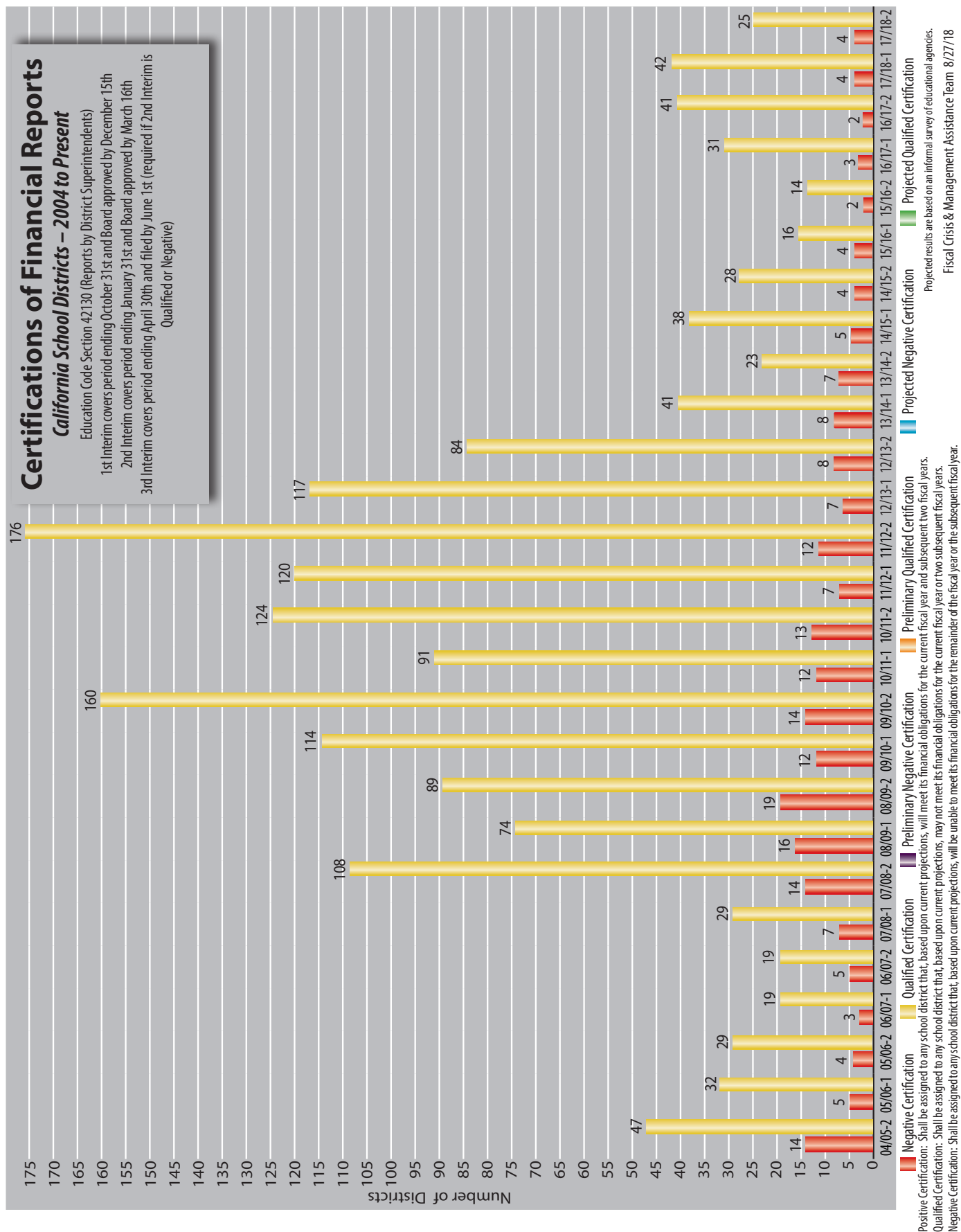
Interim Financial Report Certifications

Each LEA is required to file two reports during a fiscal year indicating the status of its financial health. The first interim report is due December 15 for the period ending October 31. The second interim report is due in mid-March for the period ending January 31.

The interim reports must include a certification of whether or not the LEA is able to meet its financial obligations. These certifications are classified as positive, qualified, or negative. A positive certification indicates that the district will meet its financial obligations for the current and two subsequent fiscal years. A qualified certification is assigned when the district may not meet its financial obligations for the current or two subsequent fiscal years. A negative certification signifies that the district will be unable to meet its financial obligations for the remainder of the current year or for the subsequent fiscal year.

As indicated in the chart on the following page, qualified certifications were at 42 in the first reporting period for 2017-18. During the second reporting period, they decreased substantially to 25. Negative certifications increased from two in the second reporting period in 2016-17 to four in the first reporting period in 2017-18, and remained at four in the second reporting period.

FCMAT has monitored interim certification status since its inception, and will continue to do so as an integral part of its efforts to assist LEAs in preserving their fiscal stability.



Professional Learning

FCMAT's professional learning offerings continue to evolve to support FCMAT's mission to help California's local educational agencies fulfill their financial and management responsibilities by providing fiscal advice, management assistance, training and other related school business services. During 2017-18, FCMAT continued to focus on providing a variety of professional learning opportunities and products to support both new and long-term colleagues in education finance. Professional learning includes regional and entity-specific workshops; various leadership preparation programs; written resources, manuals and guides; and product development. FCMAT staff provide and develop most of the opportunities, but FCMAT also partners with other education agencies when doing so would benefit the field. The goal is to reach a larger audience with a more robust offering of programs with the financial resources that FCMAT receives, and FCMAT continually evaluates how the field would best be served. FCMAT recognizes that professional learning is critical throughout school employees' employment so they can be successful and meet the increasingly tough expectations of their jobs.

Although FCMAT receives an annual state appropriation of \$1,137,000 for professional learning, additional staff and financial resources are allocated to this area so FCMAT can continue to provide responsive leadership and guidance to the field. FCMAT's workshops are provided at a nominal fee to ensure all costs are covered. Product development, leadership preparation program support and written resources are provided at no charge, with few exceptions.

The employment pool of experienced, qualified chief business officials (CBOs) continues to be critically thin in California, and retirements from these jobs remain high due to the aging of the workforce. There are many smart and interested candidates for CBO roles, but leadership skills and experience can be key missing elements. FCMAT offers workshops, tools and leadership preparation programs to help CBOs keep pace with the current needs and requirements involved in K-14 education.

FCMAT constantly monitors and continues to add to, and edit, its product and professional learning offerings to meet the ongoing needs of the education community. The support of public- and private-sector partners is essential to the success of our professional learning endeavors.

Professional Learning Utilizing FCMAT Staff

FCMAT staff continue to speak on important topics statewide in a variety of K-14 venues when requested. In addition, staff provide face-to-face workshops on a variety of topics in half-day or full-day formats throughout California. Topics are annually reviewed and updated based on latest developments in educational finance areas. These presentations are well received, and attendees share that because of their attendance they better understand the topic discussed.

The following workshops are offered at minimal fees to recover costs, and all workshop materials are developed and produced by FCMAT staff:

- Associated Student Body (ASB)
- Booster Club Training
- LCFF/LCAP Mastering the Basics
- LCFF/LCAP Beyond the Basics
- Charter Schools: Managing Challenges and Becoming Champions
- Why Data Matters

Professional Learning Partnering with Outside Agencies

FCMAT partners with outside agencies and the private sector to provide training and information to California's educational agencies. Partnering involves sharing financial and staff resources, and includes the following:

- California County Superintendents Educational Services Association (CCSESA), Business and Administration Steering Committee (BASC), External Services Subcommittee (ESSCO), County Office Finance Subcommittee (COFS) and Technology and Telecommunications Steering Committee (TTSC): Annual and AB 1200 conferences and committees
- California Charter Schools Association (CCSA): Data Management and Fraud Prevention workshops
- California Association of Directors of Activities (CADA): Associated Student Body Training
- School Services of California (SSC): May Revision and Unraveling the Mysteries of School Finance for Administrators workshops
- California Association of School Business Officials (CASBO): Accounts Payable and CBO Boot Camp workshops
- ASBWorks: Associated Student Body Training
- Charter Authorizers Regional Support Network (CARSNet): Steering Committee and Charter Oversight workshops
- Technical Assistance and Professional Development (TAPD) Grant: Steering Committee

Leadership Preparation

FCMAT recognizes the importance of leadership preparation and participates in a variety of programs. FCMAT's goal is to continue to instruct district administrative positions, including chief business officials, to better understand and perform their jobs and to learn essential leadership skills, as well as better understand the demands and the wide range of areas covered, so they can be better equipped for the job.

Most FCMAT staff members are involved in these important leadership preparation programs in some manner, whether as curriculum leaders, presenters or facilitators. Enrollment in these programs is always at capacity, and they are essential to providing California's LEAs with skilled personnel who can lead business operations in a county office, K-12 school district or charter organization.

These comprehensive leadership preparation courses that FCMAT supports in many ways include:

- FCMAT's CBO Mentor Program
- University of Southern California School Business Management Certificate
- California Association of School Business Officials CBO Partner Training Program
- Coalition of Adequate School Housing School Facilities Leadership Academy
- California Educational Technology Professionals Association, Chief Technology Officer Mentor Program
- Association of California School Administrators School Business Academy

Written Resources and Tools

FCMAT continues to maintain, update and add to its library of written resources and tools that help expand overall knowledge as well as provide guidance on legal issues and best practices. Where possible, these resources are offered as a readable document on the FCMAT website as well as a downloadable version.

These include the following:

- Associated Student Body Accounting Manual, Fraud Prevention Guide and Desk Reference
- Charter School Accounting Manual and Best Practices Manual
- Charter School Annual Oversight Checklist
- Financial Accountability & Oversight Provisions of AB 2756
- Fiscal Alerts
- Fiscal Health Risk Analysis, K-12
- Fiscal Health Risk Analysis, Community College
- Fiscal Oversight Guide
- Fiscal Procedural Manual for Business Officials in California County Offices of Education
- Indicators of Risk or Potential Insolvency, K-12
- Indicators of Risk or Potential Insolvency, Community College

Certificated Salaries and Benefits Project (J-90)

Every spring, every school district and county office of education in California is given the opportunity to complete an optional form entitled Salary and Benefit Schedule for the Certificated Bargaining Unit (Form J-90). This form, which continues to be supported by FCMAT, requests salary schedule information, employee placement on the salary schedules by full-time equivalents, bargaining unit bonuses paid for selected services, salaries and days of service for school principals and superintendents, and health and welfare benefits by carrier with amounts paid by the district or county office per employee. This data is useful to California school districts and county offices, employee bargaining units, school consulting agencies, academic institutions and state policy makers. The California Department of Education additionally uses this material for completing specified information required for the School Accountability Report Card (Education Code Section 41409.3). Although responses are voluntary, the 2016-17 J-90 contains 83% of school districts and county offices of education, representing 97.96% of the state's ADA.

FCMAT partners with School Services of California, the California Department of Education, the California Federation of Teachers and the California Teachers Association in this effort.

Product Development

Local Control Funding Formula and the LCFF Calculator

In October 2013 FCMAT partnered with members of the Business and Administration Steering Committee to help guide the educational community in estimating state funding under the new Local Control Funding Formula (LCFF), which became effective July 1, 2013. Since then, the calculator has improved each year to better meet the revenue projection needs of school districts and charter schools.

In 2017-18, FCMAT released two major versions of the calculator, aligning with the release of historical data and updated assumptions necessary to complete projections. Additionally, work was performed to minimize rounding errors that were becoming more significant with the 12-year span contained in the calculator.

Work to project the Education Protection Account funding continued in 2017-18. The calculator was realigned for the new certification process and exhibits from the CDE, and additional work was completed to help LEAs project the differences between annual entitlement and recording of receipts.

The FCMAT development team continues its efforts to enhance the calculator to meet the ongoing needs of the education community.

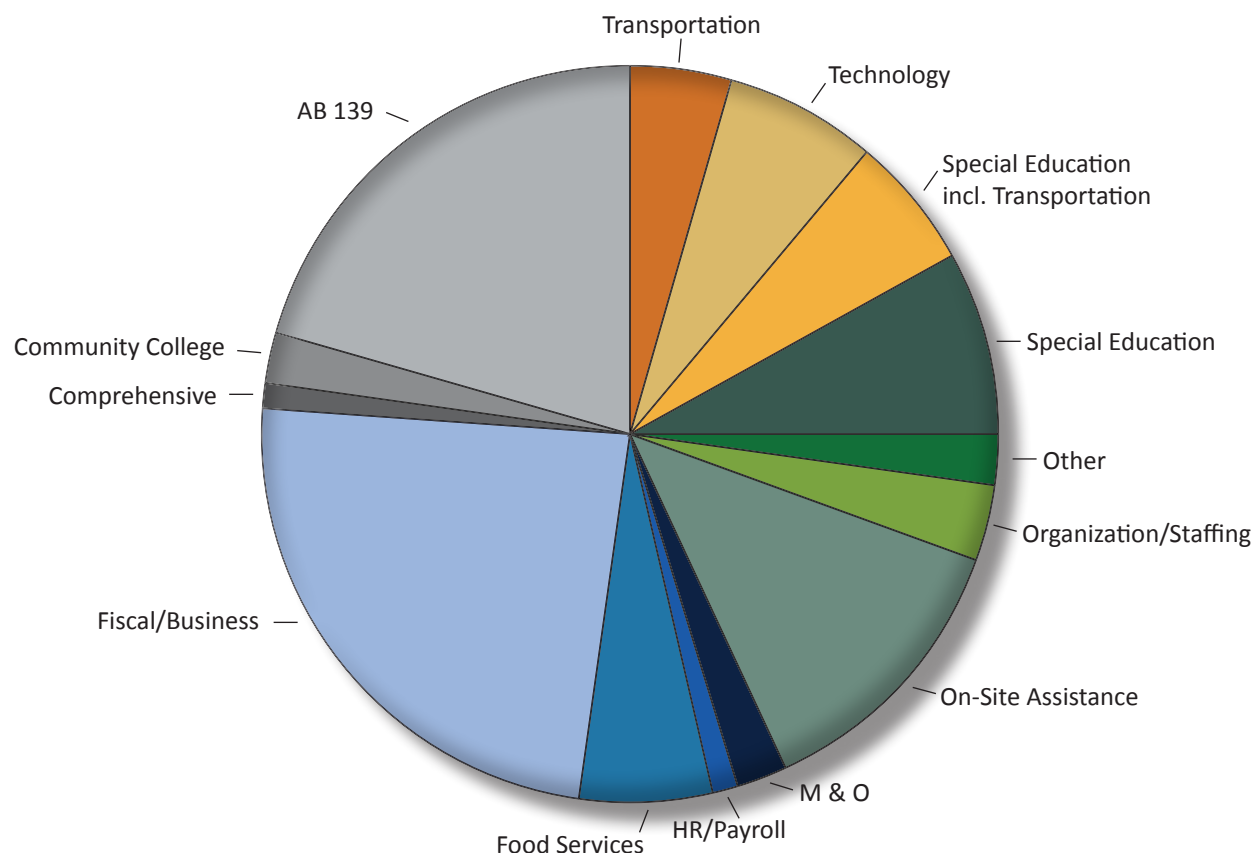
Budget Explorer and Projection-Pro

FCMAT continued development on Projection-Pro, the updated multiyear and cash flow projection software, throughout 2017-18. The development team worked in many areas of the software, including student projections, multiyear projections, cash flow projections, data exports and reports. Additionally, the team worked on a custom chart of accounts and a Charter Alternative Form format to support the needs of the growing charter community.

Early plans specified a position control projection tool in the software. After much consideration and planning, an alternative import process was developed. This allows clients to arrange the data from the local position control system or alternative tool into a specified format to be imported. While the position control projection tool was initially designed to assist small LEAs that may be operating without an integrated position control system, the new solution will be beneficial for all LEAs.

Field testing of the Projection-Pro application is ongoing. It will be released for use as soon as field testing and any required revisions are made and tested. In the interim, FCMAT continues to support Budget Explorer by providing updated assumptions to create reliable multiyear projections.

Types of Reviews for Fiscal Year 2017-18



AB 139 = 18

Community College = 2

Comprehensive = 1

Fiscal/Business = 21

Food Services = 5

Human Resources/Payroll = 1

Maintenance and Operations = 2

On-Site Assistance = 11

Organization and Staffing = 3

Other = 2

Special Education = 7

Special Education w/Transportation = 5

Technology = 6

Transportation = 4

FCMAT Trend Analysis

As in previous years, the number of studies that FCMAT engaged in increased when compared to the previous year, from 83 in 2016-17 to 88 in 2017-18.

A review of this fiscal year shows a significant increase in the number of AB 139 extraordinary audits and engagements specifically related to business and fiscal work. AB 139 extraordinary audits increased from 10 the previous year to 18 in 2017-18, with more than half focused in non-charter schools. Business/fiscal engagements increased from 11 the previous year to 21 in 2017-18. This included work such as processes and procedures for budget development and monitoring, multiyear financial projections, cash flow analysis and fiscal health risk analysis.

FCMAT continues to provide needed on-site technical assistance to LEAs. This is an opportunity for our team to quickly respond to an LEA's need, provide on-site assistance and leave it in an improved condition. Some of this work has been about building capacity of those in the field as well as creating meaningful relationships that can continue beyond the initial assistance. On-site technical assistance is a strength of our organization, with our staff being our greatest resource. We anticipate this will continue to be a priority for years to come.

FCMAT's statewide assistance includes the development of Projection-Pro: a free online software capable of multiyear financial and cash flow projections. This new service is targeted to be released in 2019 and can be used by school districts, county offices, charter schools and oversight agencies. FCMAT continues to maintain the LCFF Calculator, Calculator Caveats, LCFF Listserve subscription, LCFF and ASB Online Help Desks, Ed-Data, CALPADS Reports and LCFF Self-Paced Training links.

During 2017-18, FCMAT staff provided a variety of professional learning workshops statewide in a number of areas. These offerings were provided in response to specific requests from the field as well as staff continuing to monitor the needs of the education community.

The 2017-18 offerings included 19 regional workshops. Eight covered the topics and relationships of creating quality multiyear projections and understanding the important links to LCFF and LCAP; seven focused on the importance of proper data collection, including understanding how CALPADS data are used by federal and state agencies, how funding is generated, and the critical timelines that are essential to maximizing revenues; and the other four concentrated on charter school oversight, including the processes, requirements, timelines, best practices and other considerations to help charter school petitioners and their potential authorizers establish successful partnerships.

Additional trainings included 52 ASB workshops focusing on information school leaders need to legally account for these funds while maintaining fiscal accountability, legal compliance, transparency and accuracy in student body accounts; five workshops focused on completely meeting district responsibilities effectively when working with booster clubs, foundations, auxiliary groups and other parent-teacher organizations; three workshops specifically designed for superintendents and top administrators to assist in their understanding of the critical aspects of an LEA's finances to improve policy decisions; three presentations on the newly published Charter School Accounting and Best

Practices Manual, which contains information on recommended, required and best practices for charter school administrators and operators as well as charter authorizers; and a variety of presentations around the state in numerous K-14 venues on the many fiscal topics that FCMAT staff encounter daily as well as leadership preparation.

FCMAT will continue to offer a wide range of topics in a variety of professional learning subjects and programs in the 2018-19 fiscal year, and will continue to modify offerings based on the needs of the field as well as current requirements in K-14 education.

Based on recent trends, FCMAT's priorities will continue to be focused on business and fiscal issues affecting school districts, county offices, charter schools, and community colleges; multiyear financial projections; cash flow analysis; budget development and monitoring; AB 139 extraordinary audits; fiscal health risk analysis; professional learning and product development.

Client Evaluation Results

Upon completion of each study and workshop, FCMAT sends the client an evaluation form requesting feedback for the services provided. These evaluations help FCMAT to meet its clients' needs and document areas of service that may need improvement.

For 2017-18, FCMAT received 11 completed study evaluations and 12 completed workshop evaluations. The responses from the evaluation forms received during 2017-18 are shown in the tables below. This client evaluation summary does not reflect FCMAT's ongoing fieldwork or legislative assignments to conduct comprehensive assessments.

Study Evaluations

Did the FCMAT team complete the objective of the study as requested?			
	Yes	No	N/A
	11	0	
Did you find the FCMAT team to be:			
Qualified	11	0	
Knowledgeable	11	0	
Professional	11	0	
Cooperative	11	0	
Did the management assistance team provide the following?			
Orientation meeting	11	0	
On-site review	11	0	
Final report	11	0	
Board presentation	3	1	7
Was the timeline from request for services to fieldwork satisfactory?			
	11	0	
How would you rank FCMAT's overall assistance?			
(Scale of 1-5, 5 = Excellent)			
Ranking of 5	9		
Ranking of 4	2		

Workshop Evaluations

Did the FCMAT team meet the objective of the workshop as requested?		
	Yes	No
	11	1
Did you find the FCMAT presentation to be:		
Easy to follow	12	0
At a comfortable pace	10	2
Left time for questions	12	0
Clearly communicated	12	0
Did you find the FCMAT presenters to be:		
Qualified	12	0
Knowledgeable	12	0
Professional	12	0
Cooperative	12	0
Workshop Materials		
Were handouts provided?	11	0*
Were the handouts understandable?	11	0*
Were the handouts useful?	10	0**
How would you rank your level of satisfaction with the entire workshop process?		
Ranking of 5	9	
Ranking of 4	2	
Ranking of 2	1	

* One respondent did not answer the questions in this section.

** One respondent did not answer this question.

Comments on Study Evaluations:

"This is my first real experience with FCMAT. I found them to be extremely helpful, knowledgeable, excellent at guiding, and available. It did not matter what time we needed to conference, as busy as they are they always made the time. Outstanding organization. I cannot think of anything for them to improve on."

"All areas were covered in a thorough and professional manner."

Comments on Workshop Evaluations:

"Can't think of anything that could be improved. Michael A. is a fantastic addition to the FCMAT team!"

"Always a pleasure to work with Michelle and Michael."

Technical Support

FCMAT Help Desk

FCMAT provides support to the educational community including K-12 school districts, charter schools, community colleges and county offices by providing a free online help desk to assist those seeking guidance.

Ticket submissions in the category of ASB Organizations & Booster Clubs have significantly increased over prior year, while most other categories have remained stable or decreased. Requests in the area of “Other” pertained to a wide range of topics, such as support for FCMAT tools, listserves, and local policy best practice questions.

FCMAT responded to a total of 919 questions submitted through the online help desk during the 2017-18 fiscal year. A five-year history of FCMAT help desk activity is provided in the table below.

Topic	Number of Questions:				
	2013-14	2014-15	2015-16	2016-17	2017-18
ASB Organizations & Booster Clubs	269	305	422	273	548
Board of Education	6	3	5	1	2
Budget Explorer	97	63	41	34	33
Charter Schools	9	13	16	12	19
Community Colleges	5	2	2	1	0
County Office of Education	3	4	6	0	6
Facilities / Food Service / Transportation	6	9	13	11	19
Human Resources	0	0	6	15	9
LCFF/LCAP - Districts	280	185	121	96	88
LCFF/LCAP - Charter Schools	90	74	66	55	38
Other	23	50	61	84	125
School Business-CBO / General	62	45	45	17	32
Total	850	753	804	599	919

FCMAT added 599 responses to its searchable knowledge base to help clients to quickly resolve questions. Items that are not added are either duplicate or are requests for assistance with FCMAT tools like the LCFF Calculator or Budget Explorer.

Listserves

FCMAT maintains confidential listserves for various job-alike groups. These listserves are a vital communication link between professional colleagues and are a fast, free, and secure method for

sharing information. K-12 professionals may connect with their colleagues throughout the state to share documents and obtain relevant and timely information.

FCMAT maintains these active job-alike listserves at <http://fcmat.org/maillinglists/>:

- Charter School Administrators
- Credentials
- County Office CBOs
- District Office CBOs
- District Office HR Administrators
- Facilities Professionals
- Purchasing Professionals

FCMAT Website

FCMAT's website, www.fcmat.org, is continually updated and revised as needed to ensure that LEAs have access to the latest tools and information. The updates reflect FCMAT's purpose and mission, helping LEAs remain fiscally astute and stable. In recent times, that has included a particular focus on helping LEAs understand their LCAP and LCFF responsibilities.

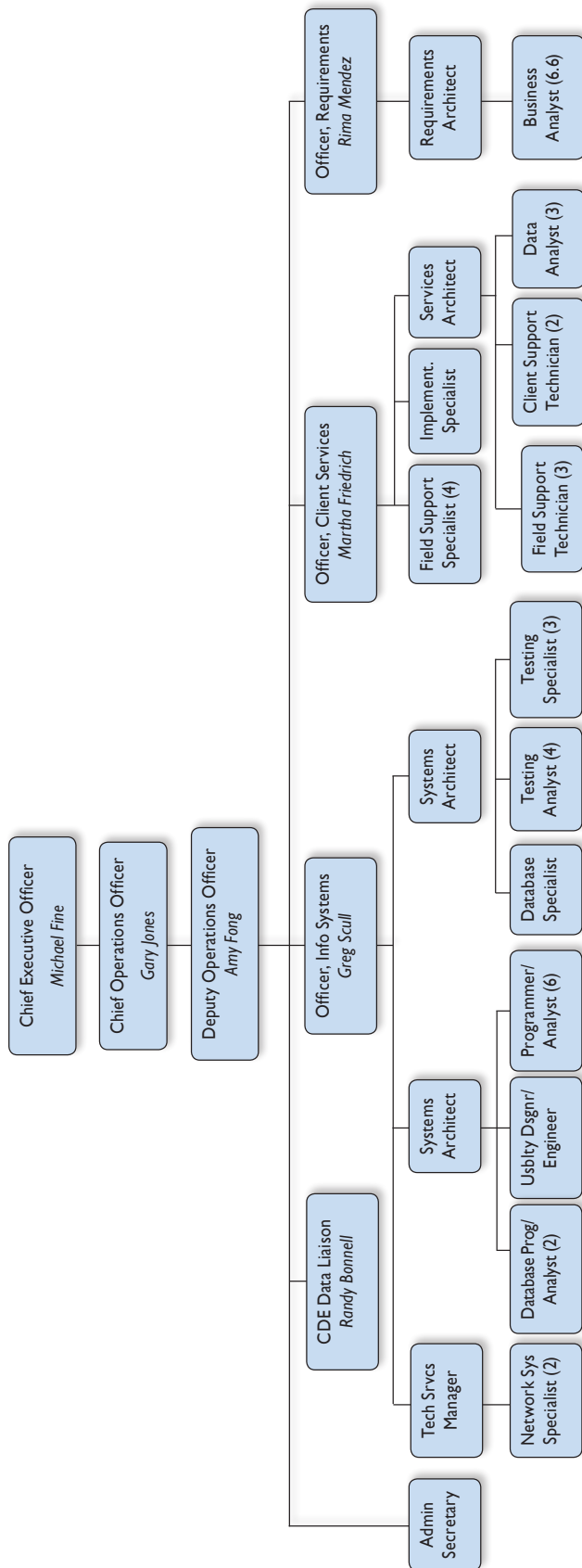
The website's professional learning calendar reflects the increase in FCMAT's professional learning offerings and provides user-friendly details and payment methods for various workshops. The LCFF Calculator resides on the website, as do major publications such as the Associated Student Body Accounting Manual, Charter School Accounting and Best Practices Manual, and others. These and other downloadable resources continue to be offered free of charge, with more interactivity for an easier user experience.

The website continues to feature its popular daily links to education news articles, as well as FCMAT's free Budget Explorer software and other fiscal tools.

Education Audit Appeals Panel

Education Code Section 41344 provides an opportunity for a local education agency to appeal a finding contained in a final audit report. This code section established an audit appeals panel consisting of the Superintendent of Public Instruction, the Director of the Department of Finance, and the Chief Executive Officer of FCMAT, or their designees. Former FCMAT CEO Joel Montero serves as the chairperson; Jennifer Whitaker represents the Director of Finance; and Nicolas Schweizer represents the Superintendent of Public Instruction. The panel meets at least monthly; its meeting schedule and other information may be found on its website: www.eaap.ca.gov.

CSIS Organizational Structure



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CSIS Strategic Plan

CSIS continues to focus on improving the California Longitudinal Pupil Achievement Data System (CALPADS) and increasing access to and use of high-quality data. CALPADS grows in importance each year. Currently, work is underway to transition the Special Education system, CASEMIS, to CALPADS over the coming years.

Strategic CALPADS activities for CSIS included:

- Providing training and assistance to LEAs on CALPADS submissions and good data management practices.
- Completing requirements, development, database maintenance and support, testing and configuration/deployment tasks associated with implementing enhancements and resolving identified defects in CALPADS per direction set by the California Department of Education (CDE). In 2017-18, this work included moving the process of the four-year adjusted cohort graduate rate (ACGR) in CALPADS and improvements in reports and validations to help LEAs submit and certify accurate data for accountability and reporting.
- In collaboration with the CDE, continuing to improve the processes used to support and maintain CALPADS.

In 2017-18, CSIS supported LEAs in completing the CALPADS submissions listed below. These submissions require LEA staff time to upload the data, resolve errors, verify reports and certify the data.

Submission Name	Data Submitted
Fall 1	Student enrollment, graduates, dropouts, English Language Acquisition Status, immigrant counts, eligibility for free or reduced-price meals (FRPM), foster youth and unduplicated count of students who are FRPM eligible, English learners and/or foster youth
Fall 2	Student course enrollment, staff assignments and full-time equivalents and English learner services
End of Year 1	Course completion and career technical education participants, concentrators and completers
End of Year 2	Program eligibility/participation, homeless students and military families
End of Year 3	Student discipline, student absence summary and cumulative enrollment
2018 Cohort	Four year ACGR

The Ed-Data website (<http://ed-data.org>) makes data from CALPADS and other sources accessible to the public and available for use in planning and decision making. CSIS works collaboratively with CDE and EdSource to update Ed-Data with data to provide educators, policymakers, the Legislature, parents, and the public quick access to timely and comprehensive data about K-12 education in California. Strategic activities for Ed-Data in 2017-18 included:

- Continuing to collaborate with CDE and EdSource to maintain the site and respond to requests and questions from users.
- Completing requirements, design, development, database maintenance and support, testing and configuration/deployment tasks associated with adding data and planned enhancements to the site.

Along with FCMAT, CSIS participated in the Kern County Superintendent of Schools (KCSOS) 2015-2018 strategic planning process. CSIS developed objectives and action steps to support KCSOS goals. The KCSOS goals and objectives as well as CSIS action steps and a summary of work completed by action step in 2017-18 are:

Goal: Improve student growth and achievement & accountability

Specific Objective: Improve Ed-Data and CALPADS functionality and/or use in support of improved student achievement and accountability.

CSIS Action Steps:

1. Modify CALPADS to support accountability.
2. Increase the number of five-year trend charts with assessment and/or accountability data on the Ed-Data website.
3. Support LEAs in their reconciliation of accountability data and use of assessment or accountability data in CALPADS.

Summary of Work Completed in 2017-18:

Action step 1: In 2017-18, CSIS collaborated with the CDE to modify both the collection and reporting of career technical education (CTE) coursework in CALPADS to support the California School Dashboard. Because completion of a CTE pathway is part of the CALPADS data used for the College and Career Indicator, CSIS implemented updated course codes. CSIS implemented more stringent validations for CTE concentrators and completers to ensure accurate data for accountability and other state and federal reporting.

Action step 2: In 2017-18, CSIS added California Assessment of Student Performance and Progress (CAASPP) data and graphs containing English-language arts/literacy and mathematics to Ed-Data.

Action step 3: CSIS continues to support LEAs in reconciling their accountability data and using data locally. In 2017-18, CSIS helped to modify CALPADS to identify the four-year ACGR. This feature enables LEAs to see their cohort counts and rates and gives them the ability to independently assess and fix inconsistencies in their data.

Goal: Maximize service to clients and improve access to resources

Specific Objective: Improve service and/or access to resources in 100% of CSIS services (CALPADS and Ed-Data).

CSIS Action Steps:

1. Increase the number of CALPADS trainings that stress the relationship between errors and data quality.
2. Increase the number of five-year trend charts on the Ed-Data website.
3. Decrease the average wait time for CALPADS snapshot reports.
4. Increase the percentage of LEAs and/or CALPADS administrators receiving CALPADS recognitions.

Summary of Work Completed in 2017-18:

Action step 1: In 2017-18, CSIS continued to stress the relationship between errors and data quality in its regular course offerings and in question and answer sessions. CSIS created a new course, Why Data Matters, to help LEAs understand the need for accurate data in CALPADS to feed into the Dashboard.

Action step 2: In 2017-18, CSIS added CAASPP data and graphs containing English-language arts/literacy and mathematics to Ed-Data.

Action step 3: In 2017-18, CSIS updated CALPADS software framework versions and helped CDE move the CALPADS physical environment to the cloud to improve performance. This work also yielded additional benefits. CSIS enhanced the CALPADS security model to give users from different organization types, such as Special Education Local Plan Areas, county offices of education, and multi-LEA users the ability to review, revise and/or certify data. CSIS added a new “view only” role to help LEAs coordinate and collaborate on reviewing and revising data submissions. The updated CALPADS user interface meets Section 508 usability requirements for accessibility. The navigation and some screens were streamlined to improve the data submission workflow.

Action step 4: In August 2018, 170 individuals received the 2017-18 Training Recognition award and 1,681 LEAs received the Data Management Recognition award. The awards this year are a decrease from last year. Since 2014, however, 1,145 individuals have completed the nine core CALPADS courses. There are plans to implement a Learning Management System to provide more visibility as to competencies and courses for individualized learning plans.

Goal: Provide responsive leadership as a community partner

Specific Objective: Promote effective use of technology, CALPADS and Ed-Data in multiple settings each fiscal year.

CSIS Action Steps:

1. Engage CCSESA's Technology and Telecommunications Steering Committee (TTSC) in discussions to increase awareness and effective use of CALPADS and Ed-Data.
2. Support the CTO Mentor Program in its efforts to train current and future chief technology officers.
3. Promote increased awareness of the role of CALPADS and Ed-Data in accountability, improved student achievement and closing the achievement gap.

Summary of Work Completed in 2017-18:

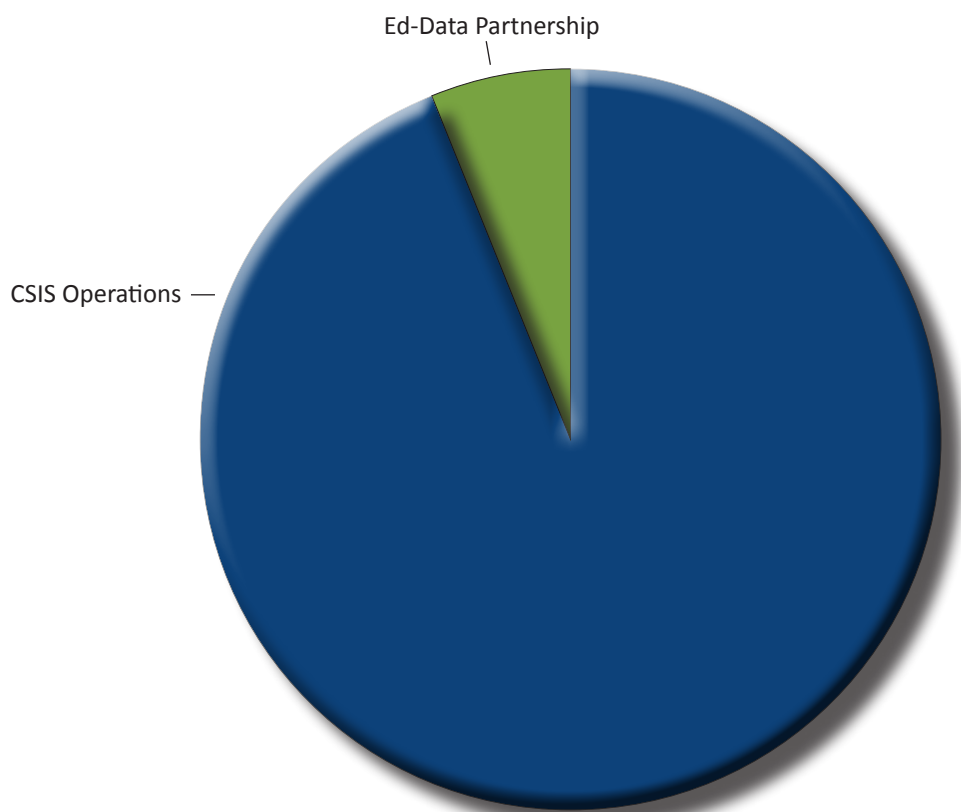
Action step 1: CSIS actively participated in TTSC and regularly shared current information about CALPADS and Ed-Data to keep the group informed and engaged in these efforts.



Action step 2: CSIS contributed to the Steering Committee for the CTO Mentor Program throughout the fiscal year and hosted the 2018 cohort classes at CSIS in Sacramento.

Action step 3: CSIS promoted the role of CALPADS and Ed-Data in accountability at charter school workshops, LCAP workshops, CCSESA workshops, and professional development workshops in county offices of education.

CSIS Appropriations for Fiscal Year 2017-18

CSIS Appropriations	\$6,182,000
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	CSIS Operations	\$5,808,000
	Ed-Data Partnership	\$374,000

CSIS Training

CALPADS

In fiscal year 2017-18, CSIS training efforts continued to focus on the California Longitudinal Pupil Achievement Data System (CALPADS). The overarching goal was to help LEAs collect, maintain, certify and use high-quality data.

CSIS trained LEAs through 22 different online and data management classes, including basic data management training for new LEA CALPADS administrators and advanced trainings for experienced administrators. In addition, CSIS provided 22 different self-paced trainings. CSIS updated the submission-based online and self-paced trainings during the year to ensure the content remained current.

The full catalog of CSIS trainings, including course descriptions and target audience, is available from the CSIS website. In 2017-18, CSIS added two courses, End of Year Preparation and CALPADS Data Privacy to inform LEA administrators of their responsibilities in accessing CALPADS data.

CSIS also provided face-to-face trainings on CALPADS data and data management at seven county offices of education and participated in three student information system vendor user conferences. These presentations were in response to county offices of education requests for more information on CALPADS and details regarding the Local Control Funding Formula reporting requirements and the California Dashboard indicators. These onsite trainings covered content from the Road Map for the School Year and State Reporting Overview for Administrators courses.

The sessions CSIS conducted at vendor conferences and onsite sessions were well attended and provided CSIS with another method to support LEAs in their CALPADS work. Chief business officials and LEA CALPADS administrators indicated the training was very helpful and they appreciated the opportunity to interact in person with CSIS staff. CSIS also presented sessions at the CASBO Annual Conference and at CASBO Shasta.

The CDE and CSIS also hosted two CDE-CSIS CALPADS Information Meetings during the fiscal year, with 631 individuals attending the October meeting and 730 attending the April session. CDE and CSIS staff shared the responsibility for presenting and responding to questions. CSIS also posted meeting materials of the October and April sessions on the CSIS website so those who could not attend could obtain the content.

In February 2014, CDE and CSIS launched the CALPADS Training Recognition Program and CALPADS Data Management Recognition Program. The CSIS website hosts the CALPADS data management and training recognition awards. The Training Recognition Program provides a certificate to individuals who complete the nine core CALPADS training courses to acknowledge an individual's effort in learning how to use CALPADS and to encourage more individuals to attend the complete set of CALPADS trainings to increase their proficiency. One thousand one hundred forty-five individuals have earned the training recognition since the inception of the recognition four years ago.

The Data Management Recognition Program acknowledges an LEA's effort to meet the CALPADS submission certification deadlines. An average of 98% of LEAs earn the data management recognition award each year. Each year superintendents express appreciation for the state's acknowledgement and staff indicate they appreciate the recognition for their hard work as well.

Ed-Data

The Ed-Data website, found at <http://ed-data.org>, is operated through a partnership of the CDE, EdSource, and FCMAT/CSIS. Ed-Data provides educators, policymakers, the Legislature, parents, and the public quick access to timely and comprehensive data about K-12 education in California. CSIS hosts and maintains the site, including real-time performance tracking that was added in May.

Adding performance data to the website as graphs and giving users the ability to compare performance data was the focus for 2017-18. Because Ed-Data graphs display five years of data and the Smarter Balanced test scores included four proficiency levels, displaying any complex student group, such as grade, gender or ethnicity, resulted in more dimensions than could fit on a two-dimensional graph. CSIS implemented a two-level drill-in solution to allow users to either view all proficiency levels for a single student group (such as 3rd grade) or data for all grades for a single proficiency level. A combined "3&4" category was developed to indicate the students that met or exceeded the state standards as a group. Ed-Data's comparison functionality was expanded to include performance data by ethnicity, English learners, students with disabilities and disadvantaged students. Ed-Data's ability to display multiyear data and compare multiple schools or districts side by side is a unique added value.

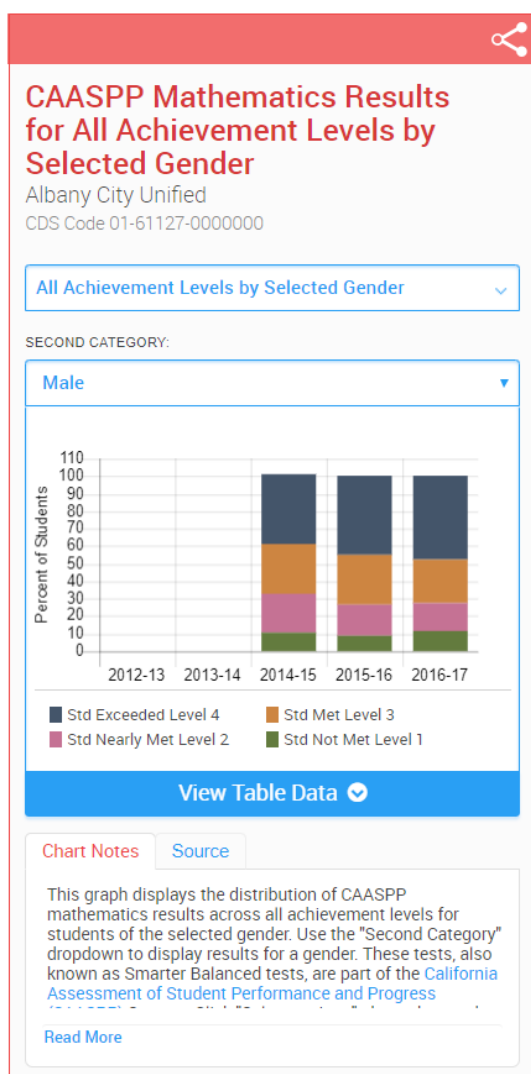
In the 2017-18 year, CSIS completed the following five Ed-Data releases:

Ed-Data Releases

Date	Release	Release Number
September 19, 2017	2016-17 student demographic data.	Release 12
December 6, 2017	Initial CAASPP release: ELA and math results for all students, and for EL, economically disadvantaged students, migrants, and students with disabilities.	Release 13
March 14, 2018	2015-16, 2016-17 staff demographics data, 2016-17 teacher salary data, CAASPP ELA and math results second category drill-ins by grade, race/ethnicity, gender and achievement levels. CAASPP data elements added to district and school comparisons.	Release 14
April 24, 2018	2016-17 financial data. Election data for all 2017 and through March 2018.	Release 15
May 15, 2018	2016-17 physical fitness test results.	Release 16

Summary of Changes:

1. The September release of student demographic data included the newly added enrollment drill-in charts for four new categories: enrollment by gender, by homeless student, by migrant student and by Special Education.
2. To keep the Ed-Data information in alignment with the California School Dashboard, in December 2017, a new section named College and Career Readiness was added to the Student tab. All relevant test results charts related to college readiness were moved from the Performance section to the College and Career Readiness section. For the first time, the December release also included the addition of two new CAASPP ELA and math charts. Each of these charts included four drill-in charts to view data across various categories. A total of three years of CAASPP data was released in December.
3. In the March 2018 release, CSIS completed a major upgrade to the underlying chart technology to support a second category drill-in. With this change, users can drill in to see the data by grade, gender and race/ethnicity CAASPP charts. New CAASPP data elements were also added to the school and district comparisons.



4. In the April release, along with adding new 2016-17 financial data, the Financial Account Code Glossary and tooltips were updated to reflect the latest changes in SACS.
5. The Ed-Data partnership continues to plan further improvements to the site. In 2018-19, the partnership will add new charter data elements and graphs to help with visualizing the charter/non-charter data side by side.

CSIS Technical Support

CSIS Service Desk Activities

CSIS consolidated its external service desks to streamline the support experience for clients and expedite service fulfillment and issue resolution. CSIS service desk operations include technical support for the California Collaborative for Educational Excellence (CCEE) and CALPADS.

CSIS provided technical support to CCEE through an agreement with CCEE's administrative agent, Marin County Office of Education. In the last quarter of 2016-17, CSIS worked closely with staff from Riverside County Office of Education to transition equipment and licenses. Between July 1, 2017 and June 30, 2018, CSIS migrated all CCEE staff accounts and mailboxes to Office 365, issued new laptops and equipment for 12 staff members and resolved 74 service desk tickets.

CSIS devotes the vast majority of its service desk resources to the CALPADS Service Desk, providing support services to 1,890 LEAs in fiscal year 2017-18, 24 more LEAs than in the previous year. These LEAs had approximately 21,747 CALPADS accounts, a decrease of 1,127 accounts from the previous year.

Between July 1, 2017 and June 30, 2018, LEAs submitted 17,426 tickets to the CALPADS Service Desk. CSIS responded to 84% of those tickets and the CDE responded to the remainder. The tables below include a breakdown of tickets by classification and by service fulfillment request category.

CALPADS Service Desk Tickets by Type - July 1, 2017 - June 30, 2018

Incident Resolution Request	820
Request for New Functionality/Service	14
Service Fulfillment Request	16,592
Total	17,426

Top 10 CALPADS Service Fulfillment Requests by Category - July 1, 2017 - June 30, 2018

Gaining Access	3,804
Reports & Extracts	1,985
Data - Exit/Enrollment	2,073
Data - Student Language	964
Data - Student Programs	868
Data - Course	687
Certification Errors	1,342
Data - Staff	430
Anomaly Resolution	303
Data – Student Absence	447

California Longitudinal Pupil Achievement Data System

In 2017-18, CALPADS continued to mature and evolve as CSIS performed the full range of activities to maintain, enhance and support CALPADS per direction set by the CDE. When the CDE and CSIS planned the work for fiscal year 2017-18, both agencies agreed the major focus for the year would be modifying the CALPADS security model to provide support for special education local plan areas (SELPA) and other organization types, and compliance with federal and state requirements for user interface accessibility.

Completing analysis on 138 change requests and 85 issues, CSIS business analysts performed change and issue management and requirements management for CALPADS. For approved changes, CSIS documented requirements in accordance with the change request, including design specifications excerpts used in development and testing activities and the subsequent final updates to CALPADS technical documentation and end-user manuals.

In June 2017, after high-level requirements and a project schedule were developed, the team moved into the design phase. As design sessions were completed, the existing CALPADS system design documents were revised to remove redundancies and isolate user functionality from back-end implementation specifications. The overall application design and navigation were addressed for usability, and CSIS developed a CALPADS style guide to ensure screen elements and controls were documented and consistent as the system was being re-engineered. With the introduction of requirements to support SELPA users and additional organization types, all new user management screens were developed. Other screens were streamlined, such as those enabling a user to view the status of and act on their submission. These wide-ranging user-facing changes meant that the entire User Manual and all training materials needed to be revised.

Technology updates were also a key component of the work completed in 2017-18. As part of the maintenance effort and to support the new security model, CALPADS was upgraded from existing Microsoft .NET framework to .NET Core. .NET Core MVC was required since web forms supporting the data grids that were prevalent in the old CALPADS application are not supported in .NET Core. CDE and CSIS collaborated on work processes and CDE procured tools to support this effort. Together, these changes required the CSIS testing team to add usability testing to the test library in addition to porting the test framework to .NET Core and adding numerous new automated tests.

CSIS technical staff supported system operations, developed new functionality and improved the usability and accuracy of CALPADS with additional bug fixes. Between July 1, 2017 and June 30, 2018, CSIS developers completed 116 change requests spanning 884 work items. Testers verified the work of CSIS and CDE developers, having tested and closed 775 work items during the fiscal year.

CSIS supported LEAs during five CALPADS submissions and the new graduation cohort process by responding to LEA questions and issues, monitoring LEA submission progress and contacting each LEA not on track to certify by the initial deadline and/or the amendment window deadline. Each submission required LEAs to reconcile a minimum of three certification reports with many aggregates. Ninety-nine percent of LEAs certified Fall 1 (one charter school failed to certify); 99% of LEAs certified Fall 2 (seven failed to certify). As of August 24, 2018, 99% of LEAs certified EOY 1, EOY 2 and EOY 3.

CSIS Website

The CSIS program's website is accessible from the FCMAT site or directly via <http://csis.fcmat.org>.

The CSIS website offers access to CALPADS training, documentation and information, as well as links to other CSIS services, such as the LEA Contact Lookup, the Secure Upload site, LEA Recognition and Ed-Data. The website includes information and resources in three areas: services, training and events, and support.

SharePoint Collaboration Sites

CSIS continues to facilitate information sharing and collaboration by maintaining SharePoint sites for use internally and with partners. The sites are accessible by authorized users. Although the sites contain other features, the most valuable part of each site is the documents library, which allows individuals to access files from any location with internet access. SharePoint automatically maintains version history and access to prior versions. The sites CSIS maintains are:

- FCMAT SharePoint site
- CSIS Internal Collaboration site
- Ed-Data Collaboration site
- CALPADS Collaboration site



Fiscal Crisis and Management Assistance Team California School Information Services

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