



CSIS California School Information Services

Bear Valley Unified School District

Management Review
January 31, 2011



Joel D. Montero
Chief Executive Officer







CSIS California School Information Services

January 31, 2011

Kegham Tashjian, Interim Superintendent
Bear Valley Unified School District
42271 Moonridge Road
Big Bear Lake, CA 92315

Dear Interim Superintendent Tashjian:

In August 2010, the Bear Valley Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for a facilities reorganization review. Specifically, the agreement states that FCMAT will perform the following:

1. Provide five-year cohort enrollment analysis by district and school including birth rate analysis for kindergarten students.
2. Develop a scoring rubric and criteria to evaluate the school closure process and provide as the baseline document for the District Advisory Committee to begin the process. The scoring rubric and criteria shall include but not be limited to the following:
 - a. Cohort enrollment analysis
 - b. Board policies regarding school site size and student capacity
 - c. Facility conditions evaluation, review of Facilities Master Plan, general obligation bond or other funding from the Office of Public School Construction
 - d. Facility capacity by site utilizing OPSC loading standards or board policies
 - e. Grade level configurations or realignment, impact to students
 - f. Location and geographic assessment by site
 - g. Academic progress including Academic Performance Index (API) or Adequate Yearly Performance (AYP) indicators by site
 - h. Transportation options regarding closure for each site
 - i. Financial analysis regarding cost savings
 - j. Special programs or schools
 - k. Impact of collective bargaining
 - l. Facility alternatives including surplus sale
 - m. Charter school analysis

FCMAT

Joel D. Montero, Chief Executive Officer

1300 17th Street - CITY CENTRE, Bakersfield, CA 93301-4533 • Telephone 661-636-4611 • Fax 661-636-4647

422 Petaluma Blvd North, Suite. C, Petaluma, CA 94952 • Telephone: 707-775-2850 • Fax: 707-775-2854 • www.fcmat.org

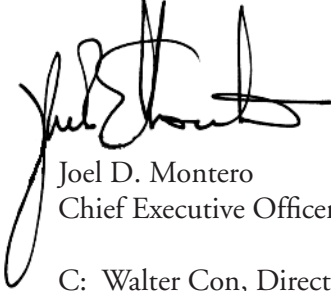
Administrative Agent: Christine L. Frazier - Office of Kern County Superintendent of Schools

3. Provide recommendations regarding the formation of the 7-11 committee and proposed time line for school closure. The time line and calendar will include the recommended scheduled presentations, sample board resolutions, and other recommended meetings and site visitations.
4. FCMAT will provide all the necessary documents and recommendations for the school closure process but will not participate as a member of the proposed 7-11 committee.

This report contains the study team's findings and recommendations.

We appreciate the opportunity to serve you and we extend our thanks to all the staff of the Bear Valley Unified School District for their cooperation and assistance during fieldwork.

Sincerely,



Joel D. Montero
Chief Executive Officer

C: Walter Con, Director, Business Services

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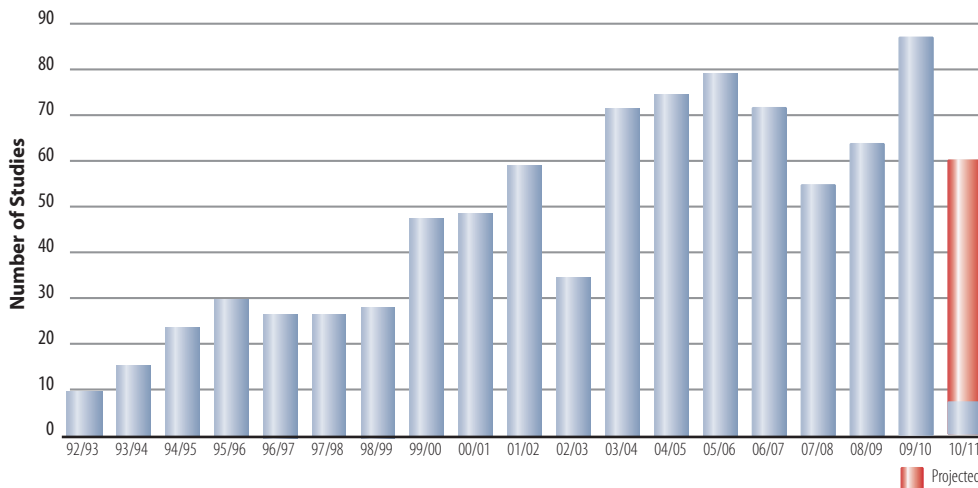
About FCMAT

FCMAT’s primary mission is to assist California’s local K-14 educational agencies to identify, prevent, and resolve financial and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related school business and data services. FCMAT’s fiscal and management assistance services are used not just to help avert fiscal crisis, but to promote sound financial practices and efficient operations. FCMAT’s data management services are used to help local educational agencies (LEAs) meet state reporting responsibilities, improve data quality, and share information.

FCMAT may be requested to provide fiscal crisis or management assistance by a school district, charter school, community college, county office of education, the state Superintendent of Public Instruction, or the Legislature.

When a request or assignment is received, FCMAT assembles a study team that works closely with the local education agency to define the scope of work, conduct on-site fieldwork and provide a written report with findings and recommendations to help resolve issues, overcome challenges and plan for the future.

Study Agreements by Fiscal Year



FCMAT also develops and provides numerous publications, software tools, workshops and professional development opportunities to help local educational agencies operate more effectively and fulfill their fiscal oversight and data management responsibilities. The California School Information Services (CSIS) arm of FCMAT assists the California Department of Education with the implementation of the California Longitudinal Pupil Achievement Data System (CALPADS) and also maintains DataGate, the FCMAT/CSIS software LEAs use for CSIS services. FCMAT was created by Assembly Bill 1200 in 1992 to assist LEAs to meet and sustain their financial obligations. Assembly Bill 107 in 1997 charged FCMAT with responsibility for CSIS and its statewide data management work. Assembly Bill 1115 in 1999 codified CSIS’ mission.

AB 1200 is also a statewide plan for county office of education and school districts to work together locally to improve fiscal procedures and accountability standards. Assembly Bill 2756

(2004) provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans.

In January 2006, SB 430 (charter schools) and AB 1366 (community colleges) became law and expanded FCMAT's services to those types of LEAs.

Since 1992, FCMAT has been engaged to perform nearly 850 reviews for LEAs, including school districts, county offices of education, charter schools and community colleges. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The team is led by Joel D. Montero, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.

Introduction

Background

Located in San Bernardino County, the Bear Valley Unified School District has a five-member elected governing board and serves approximately 2,897 students in kindergarten through twelfth grade. The district has four elementary schools, one middle school, one comprehensive high school, and one alternative high school. Student enrollment reached a peak of 3,561 students in 1997-98, but has declined each fiscal year since then except for a small increase in 2003-04.

Approximately 11% of the district's students are English learners and 52% are eligible for free and reduced-price meals. According to the 2010 Adequate Yearly Progress (AYP) Report, the district did not meet all criteria for AYP; however, it is not in program improvement (PI). Schools and local educational agencies that do not make AYP are identified as PI under the federal Elementary and Secondary Education Act (ESEA). The ESEA requires all states to implement statewide accountability systems based on state standards in reading and mathematics, annual testing for all students in grades three through eight, and annual statewide progress objectives with the goal that all students achieve proficiency by 2013-14. Schools and districts that fail to make AYP toward proficiency goals are subject to improvement and corrective-action measures.

The district passed a \$25 million general obligation bond measure in 2002 to help provide funding to renovate and build school facilities.

In August 2010, the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement with the district for management assistance. The study agreement specifies the scope and objectives of FCMAT's work as follows:

1. Provide five-year cohort enrollment analysis by district and school including birth rate analysis for kindergarten students.
2. Develop a scoring rubric and criteria to evaluate the school closure process and provide as the baseline document for the District Advisory Committee to begin the process. The scoring rubric and criteria shall include but not be limited to the following:
 - a. Cohort enrollment analysis
 - b. Board policies regarding school site size and student capacity
 - c. Facility conditions evaluation, review of facilities master plan, general obligation bond or other funding from the Office of Public School Construction
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 - j. Special programs or schools
 - k. Impact of collective bargaining
 - l. Facility alternatives including surplus sale
 - m. Charter school analysis

3. Provide recommendations regarding the formation of the 7-11 committee and proposed time line for school closure. The time line and calendar will include the recommended scheduled presentations, sample board resolutions, and other recommended meetings and site visitations.
4. FCMAT will provide all the necessary documents and recommendations for the school closure process but will not participate as a member of the proposed 7-11 committee.

Study Guidelines

FCMAT visited the district on October 27 and 28, 2010 to conduct interviews and visit school sites and student support facilities, collect data and review documents. This report is the result of those activities and is divided into the following sections:

- Executive Summary
- Guidelines for School Closure
- Financial Analysis and Cost Savings
- Necessary Small Schools Funding
- Special Schools and Programs
- Charter School Analysis
- Collective Bargaining
- Transportation
- Facility Analysis, Including Surplus Sale
- Parcel Tax
- School Closure Process
- Time Line for School Closure
- District Consolidation Committee Meetings
- Student Support Facilities
- Appendices

Study Team

The study team was composed of the following members:

Diane Branham
Fiscal Intervention Specialist
Bakersfield, CA

Leonel Martínez
FCMAT Public Information Specialist
Bakersfield, CA

Eric D. Smith*
Deputy Superintendent for Business
Santa Barbara School Districts
Santa Barbara, CA

Leigh Coop*
Director of Facilities
Vacaville Unified School District
Vacaville, CA

*As members of this study team, these consultants were not representing their respective employers but were working solely as independent contractors for FCMAT.

Executive Summary

The fiscal crisis at the state and national levels has severely affected the budgets of California school districts over the last several years. The 2010-11 state budget includes a deficit factor of 17.96% and cash deferrals of more than \$7 billion for school districts. While there are some signs of economic recovery, economic forecasters are projecting very slow growth and an extended recovery period. Because of these poor economic conditions and budget reductions to local educational agencies, the district has determined that school closure needs to be considered as one option to meet necessary expenditure reductions.

The decision to close a school is difficult because it can be disruptive to neighborhoods and communities and affects the lives of students, parents, and the district staff. However, districts throughout the state are considering school closure because of economic conditions and declining enrollment. Therefore, the district should consider this issue carefully, prepare thoroughly, and enter into a process that is defined, clear and open to the public.

The Bear Valley Unified School District engaged FCMAT to provide a five-year enrollment analysis, develop a scoring rubric and criteria to evaluate possible school closure, and to provide guidance and a sample time line for a school closure committee process.

The enrollment analysis included in this report reflects current enrollment trends and projects continued enrollment decline over the next five years. Most of the enrollment decline is expected to be at the middle and high school grade levels. The district needs to continue to monitor enrollment trends and develop a plan to address the potential enrollment decline.

Many factors need to be considered when determining whether to close a school. These include ongoing maintenance and security costs associated with a closed site, the potential loss of student attendance, the effects on special programs such as the Rainbow Kids Club, state preschool classes, and specific site-based instructional methods.

Because each district and community has its own distinct culture, the school closure process differs according to the needs of the community the school serves. Some districts go through a lengthy process with extensive community involvement to provide closure recommendations; others use internal analysis and seek comment from the public; and yet others leave the decision to the governing board without substantial public input. Depending on the process the district decides to use, there are laws, regulations, guidelines and recommendations that need to be considered.

The California Department of Education has a document entitled “Closing a School Best Practices Guide” that recommends that district school-closure committees use a fact-finding process when considering alternatives to closing schools. During this process, the committee should determine whether the decision to close a school is economically, demographically or politically motivated. In some cases, districts have found alternative uses for school sites, or other cost saving measures, that would reduce costs and allow the site to remain open and available for future growth.

According to the CDE’s Best Practices Guide, districts that decide to close a school should not do so solely because of declining enrollment. The guide suggests consideration of the following factors:

- The condition of a school facility
- The operating cost of a school
- The capacity of a school to accommodate excess students
- Special program facilities
- Environmental factors
- Ethnic balance
- Transportation
- Neighborhoods
- Education program
- Aesthetics
- Value

Because school closure disrupts students, families, the community, and the district and incurs a cost, any school that is closed should remain closed for at least five years. If the facility is needed as a school in the future, the district should carefully reverse the activities that occurred during the closure process. The costs, including personnel, utilities, maintenance and transportation should be projected and budgeted. The California Department of Education (CDE) must be notified to provide a new school code, new attendance boundaries need to be developed, and public hearings and notifications need to be conducted in the same manner as occurred during the closure process. In addition, if new construction or improvements are needed to reopen the school site, the district needs to follow the requirements of the CDE and the Division of the State Architect.

A parcel tax election is under consideration for May 2011. However, to gain operational cost savings from school closure starting in the 2011-12 school year, a school closure committee would need to operate at the same time that a parcel tax campaign is conducted. It is highly likely that the school closure issue would become the focus of the community and would decrease the likelihood of success for a parcel tax measure. Therefore, to increase the success of either effort, the district should not attempt both activities at the same time. For further advice on this issue, the district should consider consulting with parties that do not have a direct interest in the campaign results.

Findings and Recommendations

Guidelines for School Closure

There is no single formula to determine which schools to close, but guidelines include the following.

- School Utilization: The utilization of a school is a comparison of a school's capacity to its present enrollment, and schools with a utilization of less than 50 percent should be considered underutilized. These facilities are prime targets for closure if other nearby facilities can accommodate their students. However, if a school is a long distance from any other, it may still be prudent to keep it open.
- Student Travel Time: A closure should not cause students to spend an excessive amount of time on buses.
- Multiple-Grade Classrooms: Multiple-grade classrooms are a common characteristic of many low-enrollment schools. In this case, it may be more prudent to combine students in single-grade classrooms in other schools.
- Facility Condition: Older facilities that will soon need renovations should be high priorities for closure. This may even be the case if nearby newer facilities will require minor construction to accommodate more students from an older school.
- School Size/Utilization: If a school with low utilization is larger than a nearby school with a higher utilization, the less-utilized school should be maintained to accommodate students from both schools.
- Site Facilities: Schools with facilities such as gymnasiums, libraries, and multipurpose rooms should be given a higher priority in deciding which schools will remain open.
- Demographics: Because facility utilization is a primary consideration, demographic trends should be compared to the capacity of each school site. By focusing on demographic trends, all those who would be affected can make informed decisions about which school sites are underutilized and which sites may be underutilized in the future.

Enrollment Projections

Because declining enrollment is the most common reason for considering school closure, the district's historical enrollment patterns should be reviewed to estimate any decline in the near future. FCMAT used the cohort survival technique to project the district's enrollment. Cohort survival groups students by grade level upon entry and tracks them through each year they stay in school. This method evaluates the longitudinal relationship of the number of students passing from one grade to the next in the subsequent year. It more closely accounts for retention, drop-outs, and pupils who transfer to and from the district grade by grade.

Percentages are calculated from the historical enrollment data to determine a reliable percentage of increase or decrease between any two grades. For example, if 100 students enrolled in first grade in 2009-10 and that number increased to 104 students in second grade in 2010-11, the

percentage of survival would be 104%, or a ratio of 1.04. Such ratios are calculated between each pair of grades or years in school over several recent years. The ratios used are the key factors in the reliability of the projections given the validity of the data at the starting point. Each ratio encompasses the variables that could account for an increase or decrease in the size of a grade cohort as it moves to the next grade.

Projecting kindergarten enrollment differs from other grades because very little data is available regarding four- and five-year-old children that may enroll in the district the following year. The industry standard for projecting kindergarten enrollment is to identify the percentage of countywide live births that enroll in the district five years later. Based on an average of the prior three years' data, approximately .6% of countywide births become district kindergartners five years later. Assuming that this percentage holds true for the next five years, the district will have kindergarten enrollments of 225, 228, 219, 207 and 207 for the 2011-12, 2012-13, 2013-14, 2014-15, and 2015-16 school years, respectively.

San Bernardino County Live Birth Data Bear Valley Unified School District Kindergarten Projection					
Birth Year	Number of Births	Kindergarten Year	Kindergarten Students	Percent of Students to Births	Average %
					0.6469
2000	28,657	2005	210	0.7328	
2001	29,215	2006	203	0.6948	
2002	29,696	2007	184	0.6196	
2003	30,824	2008	237	0.7689	
2004	31,914	2009	181	0.5671	
2005	33,075	2010	200	0.6047	
2006	34,675	2011	225		
2007	35,193	2012	228		
2008	33,788	2013	219		
2009	31,984	2014	207		
2010	31,991	2015	207		

Source for county birth data: State Department of Finance

Source for enrollment: 2005 through 2009 – California Department of Education; 2010 – District

Further, by identifying the current percentage of kindergartners that attend each school, FCMAT has allocated the number of projected kindergartners from the whole proportionately to each school.

2010-11 Proportion of Kindergarten Students	200	Percentage
Baldwin Lane	66	33
Big Bear	56	28
Fallsvale	4	2
North Shore	74	37

The kindergarten enrollment projection by school by year is as follows:

Projected Enrollment						
	Percentage	2011-12	2012-13	2013-14	2014-15	2015-16
Baldwin Lane	33	74	75	72	68	68
Big Bear	28	63	64	61	58	58
Fallsvale	2	5	5	5	4	4
North Shore	37	83	84	81	77	77
TOTAL		225	228	219	207	207

Enrollment can be projected five years into the future by using four years of historical enrollment data, employing the cohort survival method, and projecting incoming kindergarten classes using a birth rate to future kindergarten class correlation. The enrollment projections by school are as follows:

Forecasts					
Level	11-12	12-13	13-14	14-15	15-16
BEAR VALLEY USD	2653	2640	2616	2560	2476
Elementary	1399	1399	1404	1420	1395
BALDWIN LANE	470	455	457	455	445
Kindergarten	74	75	72	68	68
1st	62	70	71	68	64
2nd	60	59	67	67	65
3rd	73	61	60	68	68
4th	62	70	58	57	65
5th	54	56	63	53	52
6th	85	64	66	74	63
BIG BEAR	367	373	382	392	389
Kindergarten	63	64	61	58	58
1st	51	57	58	55	52
2nd	50	54	60	62	58
3rd	54	47	51	56	58
4th	49	60	52	57	62
5th	45	44	54	47	52
6th	55	47	46	57	49
FALLSVALE	37	34	30	25	22
Kindergarten	5	5	5	4	4
1st	3	4	4	4	3
2nd	6	3	4	4	4
3rd	5	5	2	3	3
4th	8	5	5	2	3
5th	7	8	5	5	2
6th	3	4	5	3	3
NORTH SHORE	525	537	535	548	539
Kindergarten	83	84	81	77	77
1st	65	73	74	71	68
2nd	69	74	83	84	81
3rd	81	66	70	79	80
4th	62	83	67	71	80
5th	88	68	91	74	78

6th	77	89	69	92	75
Middle	343	339	306	274	241
BIG BEAR MIDDLE	343	339	306	274	241
7th	189	171	154	137	120
8th	154	168	152	137	121
High	911	902	906	866	840
BIG BEAR HIGH	821	820	829	809	787
9th	236	230	224	218	212
10th	218	214	209	203	198
11th	186	213	209	204	198
12th	181	163	187	184	179
CHAUTAUQUA	90	82	77	57	53
9th	15	14	13	12	11
10th	24	13	12	11	11
11th	21	28	15	14	13
12th	30	27	37	20	18

The projection shows slight declining enrollment. Because the district's residential development has been relatively low for the last five years, the cohort survival method should be adjusted for student yields from new homes once new residential development occurs. The city of Big Bear indicates that 42 multifamily residential units are under construction near Big Bear Elementary School.

A developer fee justification study prepared in December 2005 indicates that the student generation factor for residential development is .06 for the K-6 grade level. The student generation factor is not divided into single-family and multifamily developments. Therefore, the district can anticipate 2.5 K-6 grade students to be generated ($42 \times .06 = 2.5$) from the new multifamily units and assume that will be absorbed during the 2011-12 fiscal year.

Any enrollment forecast has inherent limitations because it is based on certain criteria and assumptions instead of exact calculations. Limitations include issues such as the accuracy of baseline data, unpredictable trends affecting residential housing, unanticipated changes in enrollment trends, and changing state, federal and local economic conditions. Therefore, the forecasting model should be viewed as a trend based on certain criteria and assumptions rather than as a prediction of exact numbers. To maintain the most accurate and meaningful data, the projection should be updated at least at each interim financial reporting period. By comparing actual enrollment against projections, the district should be able to identify whether enrollment is increasing, decreasing or remaining stagnant.

Because of the district's sustained pattern of declining enrollment, school closure may have to be considered sometime in the future. The governing board should consider adopting a policy that establishes a trigger, based on a specific enrollment threshold, for when school closure should be considered.

Recommendations

The district should:

1. Continue to monitor actual enrollment in relationship to projected enrollment.
2. Continue to monitor enrollment trends compared to facility capacity.
3. Adopt a board policy that establishes a trigger, based on a specific enrollment threshold, for when school closure should be considered.

Financial Analysis and Cost Savings

Most California school districts are funded on a per-pupil basis, with revenue limit funding allocated to cover the cost of operations and personnel. As a result, the decrease in revenue can be debilitating for school districts with declining enrollment. Depending on the pattern of decline, a district may lose revenue but not the need for an individual teacher. For example, a school district may lose 30 students, a few from each grade level rather than all from one grade level. As a result that district must create combination classes or make expenditure reductions elsewhere.

Revenue limit districts are guaranteed the greater of current or prior year ADA in calculating the revenue limit apportionment. The prior year guarantee enables declining enrollment districts to better manage the expenditure reductions necessary when a school district's enrollment declines. Research on the effects of declining enrollment suggests that districts are generally slow to respond because of the prior-year guarantee. Examples are as follows:

- Class sizes begin to decrease because the staff is not reduced along with the enrollment decline.
- Buildings are not fully utilized, but overhead costs continue at the same or higher levels.

School districts' operating costs do not decrease to a level that is exactly proportionate to the enrollment decrease. Examples are as follows:

- The cost to transport 50 students is the same as the cost to transport 70, presuming one bus and one driver.
- There is no significant difference between the cost of making 150 lunches and making 125.
- There is no cost difference for a custodian to clean a room that houses 23 students and one that houses 30 students.

If a school closure is under consideration for budgetary reasons, the district should review the precise cost savings that could be realized. School closure generally will result in a savings of direct costs such as site administration, support staff and utilities; however, some of the savings may be offset by the costs to preserve, monitor and protect the unused facility.

The district estimates an ongoing cost savings of \$280,000 if one school site is closed. It is unclear whether this figure includes the cost of absorbing displaced students at another campus or increasing site administrative and support staff commensurately. However, certain fixed costs, such as building and grounds maintenance, insurance, and some utility costs, will continue unabated at a closed school site. A closed school site may result in additional security and vandalism expenses because district personnel are no longer present to monitor the facility. Closing a school may also incur one-time expenses, including the construction costs necessary to secure the site and protect the district's capital investment.

While the cost savings attributed to the closure of a school site can be reasonably forecast, it is much more difficult to predict whether school closure will result in a decrease in revenue from loss of average daily attendance.

Other Cost Saving Measures

Cafeteria Fund Direct Costs

Education Code Section 38100 allows the district general fund to charge direct costs to the cafeteria fund, including the cost of telephone charges, water, electricity, gas, and waste. The charges must be applied using the procedures defined in the California School Accounting Manual (CSAM). CSAM indicates that classroom unit allocation is the appropriate method of identifying the direct cost that should be charged to the cafeteria fund.

The classroom unit (CU) allocation factor is the number of units of space occupied by each program. The CU provides a method of converting each program's square footage into a standardized allocation factor. Although the term "classroom unit" is derived from using an average classroom as the basis of measurement, all types of square footage are included in the CU count, not just classrooms.

For food services, only the kitchen and serving areas are counted as CUs. The eating area is considered common space and is omitted from the calculation unless other activities occur there. If a multipurpose room is used partly for classes and partly as the eating area, the CUs for the portion of the day attributable to classes are assigned to the appropriate program, and the portion attributable to food services is omitted.

The district's cafeteria fund has a sizeable fund balance. The fiscal year 2010-11 budget includes an estimated beginning balance of \$451,000 and planned deficit spending to decrease this fund balance by approximately \$30,000. However, there is an \$80,000 increase in the 6000 object code budget when comparing the total expenditures of the fund in the 2009-10 estimated actuals to the total expenditures budgeted for fiscal year 2010-11. If this amount could be liquidated, the projected fund balance would be increased.

The district staff indicated that the cafeteria fund is not charged its share of direct costs. Direct costs should be charged using the appropriate direct cost calculation to properly reflect the total cafeteria program costs and to capture allowable dollars in the unrestricted general fund.

Energy Savings

Although summers are generally mild and air conditioning is considered optional, temperatures in the district frequently fall well below freezing in the winter. Energy costs are more than \$1 million annually, and most of the expense is related to gas and electricity. Through cost-effective energy-efficiency improvements, many schools can reduce their energy expenses by as much as 30 percent.

Lighting may account for 50 percent or more of a facility's total electricity consumption. For most energy-efficiency retrofits, high-efficiency lighting is the key to reducing operating costs. Improvements often include the use of T8 fluorescent ballasts, compact fluorescent bulbs and electronic ballasts. Additional energy-efficiency improvements may include new, high-efficiency heating and cooling systems, motion sensors, added insulation and double-paned windows.

When choosing these projects, districts generally consider various factors such as overall project cost, available financing, and the time needed to recover costs through energy savings. A high-efficiency lighting retrofit may pay for itself in four years or less, but heating, ventilation and air-conditioning (HVAC) replacement or an energy management system may require 15 years. The shorter period for recovering retrofit costs on the lighting project can subsidize the cost of the longer period to recover costs on the HVAC project. This results in a total projected payback period of seven to 10 years, after which the savings will continue.

The community approved a \$25 million general obligation bond in November 2002. As the schools were modernized, some energy management systems and energy-efficient systems were installed, including lighting and heating/ventilation systems. According to the 2009-10 unaudited actuals report, \$3.7 million in proceeds remains. These proceeds could be used to fund additional energy management retrofits at several schools. This one-time capital investment would yield ongoing savings to the unrestricted general fund and could be accomplished without additional financing.

A districtwide energy conservation program that could provide some additional operational savings has not been implemented. Implementing such a program involves making facilities improvements and encouraging behavior changes, often taking years for significant savings to be realized. Trying to change the lifelong habits and behaviors of staff members, students, and other facilities users can meet with initial and long-term resistance.

Assembly Bill 32, the California greenhouse gas legislation, as well as the green building code, Leadership in Energy and Environmental Design (LEED), the Collaborative for High Performance Schools (CHPS), and other programs are quickly becoming the operations guidelines and will soon become mandatory for school facility construction and modernization. The district's Board Policy 3511, Energy and Water Conservation, describes energy management procedures and programs that can provide energy savings, including assessing existing buildings and facilities, developing an energy management/conservation plan, and reporting regularly to the governing board on energy management and conservation efforts.

There are many approaches to a districtwide energy management/conservation program. The district may seek advice and consultation from an energy management company or participate in various programs that claim to guarantee annual energy savings. Generally with these programs, the district pays the firm a fixed fee annually, usually in the tens of thousands of dollars, in return for a detailed energy management software setup and assistance in implementing and monitoring the program.

To achieve success, the district must create an energy manager position or incorporate that job assignment into an existing employee's tasks. The energy manager's work should continue after the energy management company's contract is completed. The energy manager position could be a part-time or full-time position and should be filled by a person who has a strong interest in energy conservation. The district would need to carefully consider contractual obligations in creating this position, but the position should pay for itself through energy cost savings.

Before the district determines whether to participate in a particular energy program, it should assess current utility expenditures and calculate the potential utility savings. This study should be completed by professional energy engineers from the local utility company or a private company that does not have an interest in providing construction work for the district. Many private companies provide the service only if they are allowed to perform the related construction work, and the district should be aware of this in determining whether to contract with a particular company.

Approaches to energy savings may include physical construction projects and/or behavior modification. Construction projects include installation of energy-savings heating/ventilation systems, automated timed thermostats and energy management system software that can be monitored from the energy manager's desktop, laptop or mobile device. Behavior modification approaches typically include turning off heating cooling and lights in unused classrooms, offices and other spaces such as gyms and multipurpose rooms; shutting doors while heating/cooling is on;

avoiding excessive cooling or heating in classrooms and offices; turning off lights, computers, and computer monitors at night, on weekends, and during holidays and other breaks.

The district should also evaluate whether its facility use policies and procedures adequately cover the cost of utilities used by outside groups. If the current fees are determined to be inadequate, the district should consider raising them. While some of the outside groups may feel that the fees should not be increased, it is incumbent upon the district to recognize the actual costs of facility use, particularly when having to reduce educational programs and staff.

Increased Student Attendance

In February 2010, the district reorganized its business office and developed the student attendance/safety officer position. The duties of this position include working with site staff on student information system issues, completing the state-required student attendance reports, and investigating ways to increase student attendance.

Like most California school districts, Bear Valley Unified's primary source of revenue is based on average daily attendance (ADA). The district's 2010-11 budget shows that each 1% increase in ADA would provide approximately \$140,000 in additional revenue. The staff indicated that steps were taken to increase ADA, including the implementation of a site-level student attendance review team, review of the school calendar structure, and review of the student attendance ratio on dates before and after holidays. The district should consider additional efforts to increase student attendance such as calendaring snow make-up days after the second principal apportionment period (P-2) and offering monthly and annual incentives to students for perfect attendance.

Recommendations

The district should:

1. Assess the ongoing maintenance and security costs of closing any school site.
2. Carefully consider the potential for loss of ADA because of school closure.
3. Examine the cost-saving alternatives to closing a school, including charging direct costs to the cafeteria fund and implementing energy management retrofits using remaining general obligation bond funds.
4. Implement its existing Board Policy 3511 by completing a feasibility study of the cost-savings potential of an energy management and conservation program.
5. Consider creating an energy manager position.
6. Assess current facilities and buildings for energy use and potential savings using professional energy engineers.
7. Consider implementing an energy savings program, soliciting bids from existing companies that can provide utility use monitoring software and suggestions for a districtwide program.
8. Consider additional efforts to increase student attendance such as calendaring snow make-up days after the second principal apportionment period (P-2) and offering incentives to students for perfect attendance.

Necessary Small Schools Funding

Enrollment projections indicate that the district's ADA will be less than 2,501 by the 2011-12 fiscal year based on the district's prior three-year attendance rate of 93.47%. This may qualify the district for necessary small school funding under the revenue limit formula. Necessary small schools serve students in remote locations and are funded by classroom instead of ADA.

To be eligible for necessary small school funding, districts must meet the following criteria:

- A districtwide ADA of less than 2,501
- An elementary school with less than 96 ADA
- Qualifications for a necessary small school.

Some schools automatically qualify as necessary small schools, such as a sole school in an elementary district with less than 96 ADA or a sole high school in a unified district if the school has less than 286 ADA. Otherwise, a school must meet standards of distance from other public schools. The standards are included in Education Code Section 42283 as follows:

(a) For the purposes of Section 42282, a "necessary small school" is an elementary school with an average daily attendance of less than 101, exclusive of pupils attending the seventh and eighth grades of a junior high school, maintained by a school district which maintains two or more schools and to which school any of the following conditions apply:

(1) If as many as five pupils residing in the district and attending kindergarten and grades 1 to 8, inclusive, exclusive of pupils attending the seventh and eighth grades of a junior high school in the elementary school with an average daily attendance of less than 101 would be required to travel more than 10 miles one way from a point on a well-traveled road nearest their home to the nearest other public elementary school.

(2) If as many as 15 pupils residing in the district and attending kindergarten and grades 1 to 8, inclusive, exclusive of pupils attending the seventh and eighth grades of a junior high school in the elementary school with an average daily attendance of less than 101 would be required to travel more than five miles one way from a point on a well-traveled road nearest their home to the nearest other public elementary school.

(3) If topographical or other conditions exist in a district which would impose unusual hardships if the number of miles specified in paragraph (1) or (2) were required to be traveled, or if during the fiscal year the roads which would be traveled have been impassable for more than an average of two weeks per year for the preceding five years, the governing board of the district may, on or before April 1, request the Superintendent of Public Instruction, in writing, for an exemption from these requirements or for a reduction in the miles required. The request shall be accompanied by a statement of the conditions upon which the request is based, giving the information in a form required by the Superintendent of Public Instruction. The Superintendent of Public Instruction shall cause an investigation to be made, and shall either grant the request to the extent he or she deems necessary, or deny the request.

(b) For the 1998-99 fiscal year and each fiscal year thereafter, a "necessary small school," as defined in subdivision (a), shall be an elementary school with an average daily attendance of less than 101 reduced by the statewide average rate of excused

absence reported for elementary school districts for the 1996-97 fiscal year pursuant to Section 42238.7, rounded to the nearest integer.

Necessary small school funding is based on a combination of the ADA for the school and the number of teachers in the school (for elementary schools) or the number of certificated employees in the school (for high schools), whichever yields the lesser amount. This allowance is an alternative to the base revenue limit funding that would otherwise be generated by the students attending the necessary small school. Districts that are eligible for necessary small school funding should calculate revenue limits with and without necessary small school funding and utilize the calculation that yields the most revenue. Necessary small school funding allows declining enrollment districts one year to make the appropriate budget adjustments and to retain some funding stability as ADA decreases. The funding rates for fiscal year 2011-11 (before the revenue limit deficit is applied) are as follows:

Number of Teachers	Average Daily Attendance	Amount to be Computed
1	1-24.49	\$137,975
2	24.5-48.49	\$275,950
3	48.5-72.49	\$413,925
4	72.5-96.49	\$551,900

A teacher is considered to be full-time for the whole year if he or she was hired full-time for more than half the days the school was maintained. The only exception is a necessary small school with one teacher.

Enrollment projections indicate that the district's ADA will be less than 2,501 by the 2011-12 fiscal year. The district operates Fallsvale Elementary School with less than 40 ADA, and the school could qualify as a necessary small school according to Education Code Section 42283 because of its geographical isolation.

The California Department of Education (CDE) does not verify whether a school is a necessary small school as defined by Education Code Section 42283. Instead, the county office certifies and submits software files to the CDE that contain the data needed to process the principal apportionment for school districts. The district should work with the San Bernardino County Office of Education to determine whether Fallsvale Elementary could qualify as a necessary small school.

Recommendations

The district should:

1. Work with the San Bernardino County Office of Education to determine whether Fallsvale Elementary School qualifies as a necessary small school according to Education Code Section 42283.
2. Calculate revenue limits with and without necessary small school funding, utilizing the calculation that yields the most revenue, if Fallsvale Elementary qualifies as a necessary small school.

Special Schools and Programs

The Rainbow Kids Club Program is a partnership between the district, the Big Bear Valley Recreation and Park District and the Soroptimist International of Big Bear Valley. The program operates at each elementary school site except for Fallsvale, and includes before and after school care for children in grades kindergarten through sixth.

The county office operates a state preschool at each of the district's elementary school sites. The California Department of Education generally contracts annually for the operation of state preschools at specific school sites. If an elementary school is closed, the county office and the Rainbow Kids Club Program should be notified well in advance so that they can adjust accordingly.

Big Bear Elementary School recently instituted a policy that requires students to wear uniforms and has embraced a new instructional method called whole brain learning. Neither the uniform requirement nor whole brain learning method exist anywhere else in the district.

Recommendations

The district should:

1. Consider the districtwide program implications before deciding on a specific school site to be closed.
2. Notify the Rainbow Kids Club Program and the county office if the district decides to close a school so both may plan accordingly.

Charter School Analysis

Proposition 39 made substantive changes to the laws governing the provision of facilities to charter schools. The basic requirement is that for each charter school operating in the district, the district is required to make sufficient facilities available to accommodate all of the school's in-district students in conditions reasonably equivalent to those of regular district schools. Regulations define "reasonably equivalent" as comparable in terms of students and grade-level organization, capacity and physical condition. Operating in the district means either currently providing public education to district students or having identified at least 80 in-district students who are meaningfully interested in enrolling in the charter school for the following year. A charter school may operate in the district regardless of whether the district authorized it or the charter has a facility inside district boundaries. If it is operating in the district boundary without district authorization, the charter must be approved by either the district's county office of education or the State Board of Education.

Proposition 39 stipulates that facilities granted to charter schools must be contiguous, furnished and equipped. Contiguous means contained on the school site or immediately adjacent unless there is no single site available, and the governing board considers safety and minimizes the numbers of sites. Furnished and equipped means that the site includes all the furnishings and equipment necessary for classroom instruction. The administrative fees for districts providing facilities for charter schools can increase from 1% to 3% in accordance with Education Code Section 47613. A chartering authority may charge for the actual costs of supervisorial oversight of a charter school not to exceed 3% of the charter revenue if the charter school is able to obtain substantially rent-free facilities.

In 2009, the State Board of Education adopted new regulations that addressed conversion charter schools and the time frame for charters to request facilities. Conversion charter schools are created when a district school's parents or faculty submit a petition to convert a district-operated school into a charter school or when a charter is created as a remedy for poor performance under the state's Public School Accountability Act. Under current regulations, a conversion charter school can remain at the school site where it operated before it became a charter school as long as the charter school annually requests the site from the school district. In addition, the school district must obtain a waiver from the State Board of Education to move a conversion charter from the previous location.

New regulations shorten the time period for districts to respond to charter school facilities requests and impose deadlines for each action to be taken during consideration of the request. The regulations also impose consequences for missed deadlines. Charter schools must submit facilities requests for the next school year to districts by November 1. Districts have until December 1 to review a charter school's enrollment projections, express any objections in writing, and calculate the enrollment projections that the district considers reasonable. If the district misses this deadline, the charter school's enrollment projections stand, and the district must base its facilities offer on those projections.

Under Proposition 39, a district can charge a charter school a prorated share of its facilities costs. However, each charter school must report to the California Department of Education (CDE), by June 1 each school year the charge per square foot it pays in the current fiscal year. CDE will post these amounts on its website.

The creation of a charter school in the district can also seriously affect the operational funding of a declining enrollment district. Revenue limit districts are guaranteed the greater of current or prior year ADA in calculating the revenue limit apportionment. This prior year guarantee enables declining enrollment districts to better manage the expenditure reductions necessary when a school district's enrollment goes into decline. However, for school districts with charter schools, the district's prior year ADA must be reduced by the ADA of students who attended a district noncharter school in the prior year and attended a district-sponsored charter school in the current year. This provision is applicable to start-up and ongoing charter schools.

In September 2006, Senate Bill (SB) 1446 was signed into law. This legislation clarified that the reduction to prior year ADA is based on the net shift of students from district schools to a district-sponsored charter school. SB 1446 also limited this adjustment so that a district cannot claim more ADA for students returning from a charter school than it adjusted for in the same year for students transferring to a charter school.

Recommendations

The district should:

1. Consider the potential for new or existing charter schools to assert a Proposition 39 request for facilities during the school closure process.
2. Carefully analyze the financial implications of charter schools in relationship to district enrollment trends.

Collective Bargaining

The effect of a school closure on collective bargaining is most challenging in the areas of class size and reassignment. When a school is closed, teacher reassignments may be accomplished through a voluntary or involuntary transfer. Although Article XVI of the district's contract with the Bear Valley Education Association (BVEA) provides the rationale and procedures for involuntary transfers and reassignments, it does not address school closure by definition and as a basis for reassignment or transfer. However, the BVEA contract stipulated that unit members who are to be involuntarily reassigned should be notified by May 1 of the prior school year.

School closure may also affect class size. It may be necessary to raise class sizes at certain grade levels depending on the number of students displaced by the closed school site. Combination classes may also be necessary if the school site that has been closed does not have enough students to fill entire classrooms at each grade level.

Recommendations

The district should:

1. Evaluate whether the number and grade level of students displaced from a closed school will result in increased class sizes and/or combination classes at other school sites.
2. Negotiate with BVEA to clarify that school closure is a criterion for the involuntary transfer of teachers.

Transportation

The district's Transportation Department has strong leadership, a good bus fleet and an above-average transportation facility. Under the transportation supervisor's leadership, the district has been able to synchronize bell schedules among school sites to increase route efficiency. The district has been active in bus replacement, aggressively pursuing replacement grants through the local air quality management district.

The district operates 10 home-to-school and three special education bus routes. Each home-to-school bus route serves one or more elementary school(s) and transports students to Big Bear Junior High School and/or Big Bear High School. Ridership is lower during the morning routes and increases in the afternoon. Information provided by district staff indicates that ridership averages approximately 3,000 rides per day.

The district's Administrative Regulation 3541 has established the following nontransportation distances by grade level:

- K-6 .75 mile
- 7-8 1.5 mile
- 9-12 2.0 mile

Depending on which elementary school is closed and where the displaced student population is redirected, additional transportation costs could vary. For example, these additional costs could be for students that require transportation but previously walked to school. Before the district decides to close an elementary school, an analysis of the potential increased transportation costs should be completed.

Recommendations

The district should:

1. Identify the number of students that walk to each elementary school in relationship to the number that are transported.
2. Complete an analysis of the increased cost of transportation based on a specific school's closure.

Facility Analysis, Including Surplus Sale

The formation of a District Advisory Committee (DAC) is not required to close a school site, but it is required when making the decision to lease or sell a closed school site. The California Department of Education's Closing a School Best Practices Guide states that "The district must appoint a DAC to advise the governing board in the use or disposition of school buildings and vacant sites not needed for school purposes (see Education Code Section 17388)." It is best if this committee is involved at the beginning of discussions about school closure, but it is a legal mandate to form and consult the committee about the use of school property once closure decisions have been made. Further guidance and recommendations from the state guide are included in the next several paragraphs.

The district should remember that proceeds from the sale or lease of surplus property generally have restricted uses. Education Code Section 17462 states that proceeds from the sale of district property must be used for capital outlay or maintenance of district property, and that the proceeds from the lease with an option to purchase district property may be deposited in a restricted fund used for routine repair of district facilities. This language excludes using the funds for general fund purposes, but it does not mention how proceeds from the lease without an option to purchase can be used.

Education Code Section 17462 also states that these funds may be deposited in the general fund if the governing board and the State Allocation Board determine that the district has "no anticipated need for additional sites or building construction for the ten-year period following the sale or lease with option to purchase," and has "no major deferred maintenance requirements." The loss of state assistance for new construction, modernization, and deferred maintenance money for 10 years usually deters districts from requesting these property disposition proceeds to be transferred to the general fund.

There are some exceptions to the restricted use of funds. Education Code Section 17463 provides for special circumstances for districts with enrollments of less than 10,001.

In addition to limitations on how the proceeds from the sale or lease of surplus property can be used, there are complicated requirements specifying to whom the property must first be offered. Many restrictions can be waived by the State Board of Education, but the following cannot (these apply to property disposed through outright sale or through lease with an option to purchase):

- Land must first be made available for use for low-income housing and for park and recreation purposes (Education Code Section 17459)
- Land must be made available to specified park and recreation departments (Education Code Section 17464[a])

Other pertinent Education Code sections that prescribe the manner in which property can be disposed are summarized as follows. These sections can be waived by action of the State Board of Education:

- Land must be offered in writing to the director of general services; regents of the University of California; trustees of the California State University; the county and city; any public housing authority; or by public notice to various public agencies and nonprofit charitable institutions. A time line to reply to the public notice is specified as 60 days after the final public notice. (Education Code Section 17464[b])

- The board must by a two-thirds vote adopt a resolution to lease or sell specific pieces of property, must specify a minimum price, and must fix a time at which sealed proposals will be received and considered (Education Code Section 17466)
- The board at an open meeting must accept the highest sealed bid (Education Code Section 17472)
- The board must accept oral bids at an open meeting and accept the highest bid (if the highest bid is oral, then it must exceed the price or rental terms by at least 5 percent) (Education Code Section 17473)

It is important to consider seeking waivers to sections that may prevent the district from choosing the most desirable new owner or lessee of its surplus property. The obligation a district has to its community is sometimes more important than realizing the highest price from district property. It is essential to confer with legal counsel before initiating the sale or lease of property.

For additional information from the CDE regarding school closure, the Best Practices Guide is located at the following website: <http://www.cde.ca.gov/ls/fa/sf/schoolclose.asp>

Recommendations

The district should:

1. Retain the services of a qualified appraiser to determine the highest and best use of any school sites proposed for closure.
2. Assign the appraiser to quantify the value of the site in terms of sale and lease.
3. Carefully consider the implications of depositing proceeds of a sold school site in the general fund according to Education Code Section 17462.

Parcel Tax

The district is considering holding a mail ballot parcel tax election in May 2011. The district contracted with Godbe Research to perform a parcel tax feasibility study, and the results were released in March 2010. The study found that the district may be successful in levying a tax of \$25 per parcel for four years, with a voter support level of 70 percent. However, as the study points out, with a plus or minus margin of error of six percent, a 70 percent voter support level may yield less than the two-thirds supermajority vote needed to pass the tax. The study also concluded that funding from the parcel tax should be targeted to the highest priorities of voters in the district, including the following:

- Emphasize improved reading, math, and science skills in all grades;
- Keep school libraries open and maintain library services for students;
- Attract and retain qualified teachers;
- Provide career development and job training programs for high school students;
- Maintain small class sizes.

Godbe Research also recommended several strategies to improve the parcel tax measure's chance of success. They include communicating the following:

- Every penny from this measure must stay local. No funds will go to the state or other school districts;
- The measure provides an exemption for senior citizens, so that it is not a burden to those living on a fixed income;
- By law, no money from this measure can be used for administrator salaries or administration;
- This measure requires citizen's oversight and yearly reports to the community to keep the school district accountable for how the funds are spent.

Although several of these strategies are designed to increase the probability that the measure will pass, it is important that the administration acknowledge the constraints that this language could impose on the district. For example, it is common practice to include language in a parcel tax measure prohibiting the use of parcel tax funds for administrator salaries. However, if that language is broadened to include all administration, it may prohibit the district from charging the parcel tax an indirect cost rate as permitted in the California School Accounting Manual. If the language in the parcel tax measure is excessively rigid, the citizen's oversight committee will likely insist that parcel tax dollars be used only to supplement, and not supplant, existing programs. If the parcel tax measure language is too rigidly constructed, it may preclude the administration from offsetting future expenditure reductions with parcel tax dollars. Discussions on school closure should not occur when the district is trying to pass a parcel tax. Because school closure is a highly emotional subject, the district should carefully consider the timing of closure discussions relative to a proposed parcel tax.

To gain operational cost savings from school closure starting in the 2011-12 school year, a district consolidation committee would need to operate at the same time as a parcel tax campaign. Potential school closure would likely become the focus of the local community, the school district and the media, and would decrease the likelihood of success for a parcel tax measure. Therefore, to increase the chances of success for either effort, the district should not attempt both activities at the same time. For further advice on this issue, the district should consider consulting with parties that do not have a direct interest in the campaign results.

Recommendations

The district should:

1. Work with affected parties to include language in the parcel tax measure that will increase the likelihood of passage without hindering flexibility regarding how the funds may be expended.
2. Avoid having a public discussion of school closure at the same time the district is pursuing a parcel tax.
3. Consider the advice of disinterested parties such as Godbe Research in deciding whether to hold a parcel tax election or implement a district consolidation committee, but do not attempt both activities at the same time.

School Closure Process

Because each district and community has its own distinct culture, the school closure process always differs. Some districts have a lengthy process with extensive community involvement to provide closure recommendations. Others consider internal analysis before approaching the public for comment. Yet others make the decision through their governing boards with little public input. No matter which process is chosen, there are laws, regulations, guidelines and recommendations that should be considered.

The CDE's Closing a School Best Practices Guide recommends that district school closure committees use a fact-finding process in considering alternatives to closing schools. During this process, the committee should identify whether the decision to close a school is economically, demographically or politically motivated. In some cases, districts have found alternative uses for school sites that would reduce costs and allow the site to remain open and available for future growth. The following is a list of possible alternatives to closing a school site. Although the list is not all-inclusive, it provides a representative sample of how school districts have utilized school sites instead of closing them. However, some options do not produce a cost savings to the district.

- Expand class-size reduction to create a need for more classrooms
- Dispose of excess portables or leased facilities
- Close surplus classrooms
- Restructure grade configurations to balance school enrollment
- Shift attendance boundaries
- Use surplus classrooms for other district functions
- Enter into joint-use/joint-occupancy agreements
- Convert to community day school use
- Lease for use as charter school (Proposition 39)
- Shift to full-day kindergarten
- Initiate universal preschool program
- Consult with National Trust for Historic Preservation for eligibility

Any decision to study school closure should not be made solely because of declining enrollment, according to the state guide. Instead, the document suggests consideration of the following factors:

- The condition of a school facility
- The operating cost of a school
- The capacity of a school to accommodate excess students
- Special program facilities
- Environmental factors
- Ethnic balance
- Transportation
- Neighborhoods
- Education program
- Aesthetics
- Value

Details on these and other factors to consider in school closure are available at the Web address mentioned above.

If a district considers school closure without the sale or lease of real property, it is permitted to appoint the 7-11 committee, also known as the district advisory committee, but a less-restrictive committee may be more useful. These committees are often referred to as the district reorganization committee, district consolidation committee or school closure committee.

These two committees have two distinct roles and responsibilities, and members usually have different interests. Therefore, a district may benefit from assigning the issues of school closure and property sale/lease to two different committees.

The following general guidelines are useful when forming and implementing a district consolidation/school closure committee process:

- 1. Communication:** Communication with the public and staff throughout the process is crucial for openness and equitability. It is essential for a process to be proposed and approved by the governing board. This should also include potential time lines for committee work, encourage open discussion among board members, and provide ample opportunity for public and staff comment.
- 2. Clear committee roles and responsibilities:** When the board decides to form a committee, the role and responsibilities should be clearly identified. The committee's role should be to provide a rank ordering of schools for closure using a rubric such as the one provided by FCMAT as a baseline. School closure should be seen as just one possible budget reduction; however, the decision belongs to the governing board.
- 3. Accurate, consistent, and justifiable data:** The data and information produced and distributed by the staff should be accurate, internally aligned and externally consistent throughout the process. The district's credibility with the public could be compromised if data is inaccurate.
- 4. Adequate time for the process:** Depending on individual circumstances, some districts have completed a school closure and boundary realignment process in three months. One advantage to an abbreviated time line is that the community moves past a difficult decision more quickly. However, a quick time line may also create a perception that the decision is being rushed, and the community and staff did not have sufficient time for comment. The key is striking a balance.
- 5. Respect for committee members' time and effort:** Meetings should begin and end as scheduled. If possible, it is more productive to have more short meetings instead of a few lengthy meetings because rested committee members make better decisions.
- 6. Acknowledgment of the outcome:** A committee's recommendations may be unanticipated, and the ultimate decision falls to the governing board. However, the community may lose confidence in the process if the board does not agree with the committee's recommendations. The board should respect and acknowledge the time, energy and emotion that can be part of a district consolidation committee's work.

7. **Separate school closure and boundary change issues:** It is usually important to make the decision to close a school first and then focus the public part of the process on the necessary boundary changes. A combined analysis will often result in the committee or parents focusing on specific boundaries too early instead of analyzing and determining which school it is most feasible to close. This could affect the outcome of the study.
8. **Committee Membership:**
 - a. **Internal Committee:** One of the first issues that should be addressed is selecting committee members, and there are pros and cons for each approach. The district may create an internal staff committee, which should minimally be made up of the chief business official, facilities/ maintenance director, transportation director, special education director, educational services/curriculum director, a principal, and a representative of the certificated and classified staff. An internal committee would review the data/factors and criteria, make a recommendation and present it to the governing board. The recommendation would ideally be presented at several community meetings to obtain public comment (more detail on the public meetings is included below). The board would hear as much public comment as it deems necessary and make a decision with a vote/resolution.
 - b. **Community-Based Committee:** Equity in representation is important to establish credibility with the community if a community-based committee is appointed. This can be accomplished as follows:
 - i. At a regular governing board meeting, the board should approve the formation of a committee, defining the number of members and categories of membership, but should direct the groups to select their own representative, with the superintendent choosing the school principal representative.
 - ii. The district should choose who will facilitate the committee meetings. This typically falls to the facilities director or CBO, but may also include a cochair from the Educational Services Department. These individuals will be responsible for the meeting logistics, including gathering and developing the factual/quantitative data, developing the agendas for the meetings (perhaps in conjunction with the committee chairperson), and spearheading the effort overall.
 - iii. The administration/staff should make a recommendation to the board regarding whether meetings should be open according to the Brown Act, closed, or open but not operating under the Brown Act. This is a critical decision and legal counsel should be consulted to ensure that the proper format is followed. Under the Brown Act, all proceedings are held in public, and agendas are available to the public no less than 72 hours before the meeting. FCMAT recommends publication of the agenda, minutes and documents one week before each meeting along with posting on the district's website. Agendas and minutes should be distributed to all school sites, with instructions for posting.

- iv. The district should specify the committee's procedural rules of operation (for example, Robert's Rules, Rosenberg's Rules, or CSBA guidelines) and provide this information at the first committee meeting. This will provide clarity to the members about how the committee will operate and how decisions will be made, including how votes are taken and what constitutes a majority or passing vote.
- v. Board members and the superintendent should consider not attending committee meetings. Community members, parents, teachers and staff will often be intimidated by board members or the superintendent. This could reduce their participation and affect the credibility of the process later.
- vi. Each school should be represented, but not overrepresented to avoid the perception that members formed a voting bloc to effect decisions.
- vii. The staff member facilitator should chair the first meeting; however, the committee should elect a chair from its membership at the beginning of the second meeting. At the end of the first meeting, the facilitator should ask for nominations and self-nominations to be sent via e-mail, including a paragraph explaining why the individual wants to be chair. The candidate nomination information should be included in the committee agenda packet in the second meeting.

Before the committee is formed, legal advice should be obtained to determine if the committee meetings are subject to the Brown Act.

Recommendations

The district should:

1. Develop a plan describing how the district will communicate with the public about the school closure process including time lines, audience, and modes of communication.
2. Determine the type of committee that will be implemented, community-based or internal, and develop the committee's roles and responsibilities.
3. Review the existing data on school closure and refine, update, and revise as needed.
4. Consider beginning the district consolidation committee process in February 2011 if cost savings for the 2011-12 fiscal year are needed. If the district decides not to proceed with school closure for 2011-12, this could begin in fall 2011, which will provide ample time to develop a strong process, balance staff workload, and allow the community to absorb the information and provide input.
5. Discuss the applicability of the Brown Act with legal counsel before a district consolidation committee is formed.

Time Line for School Closure

Depending on whether a parcel tax election is held in spring 2011, the district should determine if it is necessary to form a school closure/consolidation committee immediately or in fall 2011. Beginning the process immediately would provide for a very short time line, but could result in cost savings for the 2011-12 school year. An alternative time line is also presented below for a process that begins fall 2011 and could provide savings in the 2012-13 school year.

Before the first committee meeting, the staff should develop and prepare all data for committee use, including the criteria matrix/rubric draft. The district staff has some necessary information, but should begin an updated analysis of facilities and the costs of operating a school. Spreadsheets and documents should be prepared that include classroom capacity, teacher cost, staffing ratio scenarios, transportation route, bus fleet, and budget information. The information should be up to date and formatted for committee use.

The district lacks an up-to-date facilities master plan. Available documents include a developer fee justification study, bond program information, estimated state School Facility Program funding eligibility, and a facility implementation plan. It is not feasible to update the entire facility master plan, which is dated 2006, before completing the school closure analysis; however, it may be possible to update the data necessary for a district consolidation committee. This includes facilities classroom capacity, site capacity, core facilities capacity, facilities age and condition, and any other necessary information. The master plan should also be updated to include any construction and modernization work completed.

The facilities analysis should include the two new special education classrooms under construction at North Shore Elementary School by the county office and the classroom space this will free at other school sites.

The facilities assessment, completed in spring 2001 by WLC Architects, should be updated for each site so that the staff and committee can review and analyze current information. The district should also use updated enrollment projections such as those provided by FCMAT.

The district should consult with its legal counsel regarding any legal issues that need to be considered. These would include the requirements of the Brown Act and how the California Environmental Quality Act (CEQA) may be applicable to school closure. Legal opinions vary, but the CEQA process is likely to be applicable at some point. This can be because of potential environmental impacts such as traffic and air quality at receiving schools. The district should make sure to include CEQA activities in the time line for closure determination and boundary change processes.

The district expressed concern that a school closure may exacerbate the current enrollment decline by encouraging the formation of a new charter school or increasing home schooling. It may be beneficial to use an independent firm to conduct a formal telephone or written survey to poll parents regarding this issue and to consider the possibility of some enrollment loss because of school closure.

February 2011

At the regularly scheduled governing board meeting, the staff/administration should present a proposal for a school closure study process, including the formation of a district consolidation committee. The proposal should outline the time line, scheduled committee meetings and dates for board meetings and board action. (A sample staff memo to the board is attached as Appendix A-1 to this report.) The proposal should also provide recommendations for membership by

constituency for the internal and community-based committees with a maximum of nine to 15 people. The board should decide on the type of committee and process at the February meeting. The written invitation for membership of a community-based committee should come from the superintendent and be sent to each entity listed below. The invitation should include a fact sheet regarding the process and the purpose of the committee. (A sample is attached as Appendix A-2 to this report). Members could include the following:

- One parent from each elementary school, selected by each school principal or by the PTA, and approved by the principal
- One teacher from each elementary school, selected by the certificated bargaining unit
- Two classified employees that are not from the same elementary school, selected by the classified bargaining unit
- One principal from a school that is not affected by closure, selected by the superintendent
- The special education director
- Two or three community members from entities such as an educational foundation, the city of Big Bear Planning Department, community or economic development staff, the chamber of commerce, citizens' oversight committee. Representatives from any of these constituencies should be selected by their own membership.

One district employee who is familiar with the business and facilities issues (CBO) and one educational services administrator should be assigned to share duties as committee cofacilitators. Their role is to direct the process, provide the data and research for the committee, ensure compliance with the Brown Act (if applicable), distribute the agenda, minutes and materials, and perform all other administrative duties.

The staff should post a fact sheet about the process on the district website and distribute it to all school sites and selected community locations to provide broad outreach to the community. (A sample is attached as Appendix A-3 to this report.)

Mid-March 2011

Committee membership nominations by entities listed above should be complete.

Mid-March 2011

The first committee meeting should be conducted. It is best not to hold meetings more often than every two weeks because of the amount of preparation necessary between each meeting, including posting agendas and minutes, preparing and posting information and data, and responding to questions and media requests. A total of five to seven committee meetings would be sufficient for the committee to complete its work and provide the final report and recommendation to the governing board in May 2011.

March/April 2011

The staff works with geographic information system (GIS) and CEQA consultants to prepare boundary scenarios and CEQA documents for future board action should the governing board decide that school closure is necessary. More information regarding the process is included later in this report.

April, 2011

The staff should present the board with a progress report on the district consolidation committee and their meetings.

Early May 2011

At a regular governing board meeting, the board should hear a report from the committee, including any minority reports or statements from dissenting committee members. The board should hold a public hearing on the issue and receive public comment. The board may accept or reject the report. No vote is required at this meeting, but could occur at the next board meeting after the board has an opportunity to consider the committee recommendations.

The staff may also present a proposal for the disposition of the closed school site. Any long-term sale or lease must be accomplished through a surplus property process (utilizing a 7-11 committee) as discussed above. The process should be separate from school closure and is typically a longer process that is completed at a later date. The entire school site or part of it might also be proposed for conversion to nonschool use or specialized school use. The district should determine whether the new use will have any impacts under CEQA and if so, should be prepared to guide the proposed project through CEQA simultaneously with the boundary change process. Because CEQA and other legal issues can be quite complex, the district should continue frequent consultation with legal counsel and CEQA experts as needed.

May 2011

The governing board takes action on the school closure recommendation (a sample resolution is attached as Appendix D to this report), including which school or schools to close and requests the staff to complete a boundary change study. CEQA action should not be taken at this time, but at the time of boundary change.

Boundary Change Process**May 2011**

At a regular governing board meeting, the staff presents the board with viable boundary scenarios with a detailed presentation on attendance area changes, the number of students who will be affected in each area, and the pros and cons of each boundary scenario. The staff proposal should include appropriate CEQA documentation for governing board action. Subsequent CEQA tasks depend on the action taken and may provide for exemption, a negative declaration, or require a full environmental impact report.

Legal counsel should be frequently consulted regarding the boundary and CEQA process, timing issues, and governing board and staff actions to minimize the possibility of legal challenge.

The boundary scenarios should be posted on the district website to provide an opportunity for public comment. Information should also be posted at each school. Public input should be encouraged by e-mail and telephone, and comments should be taken at community meetings and at public hearings during governing board meetings. One district employee should be assigned to manage this process.

May 2011

Immediately following the governing board meeting, at least two community meetings should be held to explain the various boundary scenarios and receive public input. A workable meeting format could include a general presentation of the scenarios. Participants should be divided into

working groups, each group having a staff facilitator (such as a principal). The facilitator records every public comment.

After each community meeting, the staff transcribes all public comments and compiles them into the boundary binder, which eventually lists every telephone call, request, blog post, comment or question (with the response) as well as every comment made at board meetings, community meetings and the board's public hearing.

Between community meetings and board meetings, the staff should work with a GIS firm to make any necessary adjustments to the boundary scenarios. The staff should present the adjusted scenarios to the board at a regular meeting, again allowing opportunity for public comment.

Geographic Information System

A GIS graphically displays demographic data on a map, globe, or report. A GIS analysis can provide accurate quantitative information on students' enrollment and residence at one point in time and over a longer period. Using the district's student database, a GIS analysis can show student information on a district map with each student plotted and overlaying information such as boundaries, school sites and other cartographic icons. Any demographic or other data that is tracked in the district database can be displayed. For example, a critical piece of information for a school closure analysis is where students live compared with where they attend school. A GIS map could show all or any subset of students at individual schools or districtwide with various boundary scenarios and the potential enrollment of the receiving schools if a school were closed. This kind of plotting can be performed manually with maps and push pins, but GIS technology allows much quicker responses to possible scenarios.

A number of private firms offer GIS expertise for California school districts including Schoolworks, DecisionInsite and Davis Demographics. A GIS firm can be contracted for a one-time project for boundary changes or may provide ongoing enrollment projections, geocoding/mapping and boundary map services.

District transportation costs and routing should be an integral part of the boundary process, and the GIS consultant should work directly with the transportation director in analyzing boundary scenarios.

The district should not present maps with possible boundary changes during the district consolidation committee process because this can be distracting. The staff should instead work with the GIS firm and keep the maps and boundary scenarios internal until the closure decision is complete.

June 2011

The staff should present the final recommended boundary scenario to the governing board, which may adjust the boundaries or accept the recommendation as is. The recommendation should include implementation issues such as any priorities for displaced students transferring to receiving schools. These priority issues can include items such as sibling placement and in-neighborhood versus outside student placement.

A governing board vote at this time allows staff to begin implementing the school closure and boundary change. Tasks include teacher and staff relocation and possible reduction, redistribution of library and textbooks, relocation and/or disposal of computers, equipment and classroom furniture, and relocation of student and school office files and records. Board actions required under CEQA should also be taken at this governing board meeting.

In the days following board action, the district should post information sheets, new boundary maps, and any grandfathering or other transition policies at the school sites and on its website.

Implementation of School Closure

June/July 2011

A closure team should be formed that includes the closing and receiving school principals, educational services administrator, facilities/maintenance director, and information technology director. City and county officials should be notified of the changes, and emergency responders should be provided with new school site plans indicating the uses for each site, telephone numbers and contact information.

Parents should be notified regarding the new boundaries and school assignments as well as bus routes and procedures. It is often helpful for the receiving school principals and staffs to organize a welcome day for introduction and orientation of the incoming displaced students, including a bus ride to the new school. This should occur during the school day, if possible, and parents should be invited.

The moving process begins immediately following the last day of school. Depending on how the closed school site will be used, the maintenance/facilities department should begin the appropriate project including new construction or renovation if needed. New security measures such as keying, fencing or other barriers, intrusion alarm changes, and possible security camera installation should be considered and completed no later than fall 2011.

Alternative – Fall 2011 Process

If the district decides to wait to begin the school closure process because of the short amount of time remaining in the current school year, the process could begin in fall 2011 and be completed by February 2012. This would provide adequate time for public input, committee meetings, staff analysis and data/report preparation, as well as post-decision staff activities that would be needed at the school site to be closed and receiving schools.

Committee formation could occur in September with meetings occurring through October and November, a committee recommendation in December, public meetings in January and a final decision in February 2012. The boundary changes, CEQA process, and corresponding board actions could occur in March and April 2012.

Recommendations

The district should:

1. Determine whether a district consolidation committee will be formed immediately or in the future.
2. Develop and prepare data for the committee, including a draft criteria matrix (rubric).
3. Prepare new capacity information for the school closure process, including classroom, site and core facilities.
4. Prepare detailed information on the fiscal effects of school closure relative to student transportation.

5. Provide notifications in languages other than English if 15% or more of the student population is represented.
6. Consult with legal counsel to address any legal issues that the district may encounter in the school closure and boundary change processes.
7. Consider hiring a communications firm to develop a parent survey to determine the potential effects of school and program closure on student enrollment.
8. Develop a fact sheet describing the process and purpose of the district consolidation committee.
9. Consider contracting with a GIS firm early in the process to obtain the student database, verify and configure the data for use, and work with staff on potential boundary scenarios.

Sample School Closure Time Line for District Consolidation Committee (DCC) Process								
Task Name	Duration	Start	Finish	February 2011	March 2011	April 2011	May 2011	June 2011
Appoint staff subcommittee to serve as research group for DCC	From research to implementation	Feb 2010	June 2011	X				
Subcommittee begins facility and demographic research	From research to implementation	Feb 2010	June 2011	X				
Consult with legal counsel on CEQA	Throughout process	Feb 2010	June 2011	X				
Consult with GIS consultant on potential boundaries for capacity analysis	Throughout Process	Feb 2010	June 2011	X				
Staff presents school closure process proposal to board			Feb 2011	X				
Appoint district consolidation committee		Feb 2011	Mar 2011	X				
Develop fact sheet on school closure process	Develop and distribute	Feb 2011	Mar 2011	X				
DCC meetings	Two-month commitment minimum	Mar 2011	May 2011		X			
Staff Progress Reports to Board		Apr 2011	May 2011			X		
Board public hearings on school closure	At each board meeting once DCC starts meeting	Apr 2011	May 2011			X		
Committee report to board including recommendations	Regular board meeting	May 2011	May 2011				X	
Board takes action on school closure	Next board meeting		May 2011				X	
Staff presents boundary scenarios	Next regular board meeting	May 2011	May 2011				X	
Public comment on proposed boundary changes at affected school site meetings	2 months	May 2011	June 2011				X	
Staff present final recommendations on boundary changes to board		June 2011	June 2011					X
Board takes action on proposed boundary changes			June 2011					X
Staff implement school closure/ boundary change	3 months	June 2011	Aug. 2011					X

District Consolidation Committee Meetings

A community-based committee will require careful and timely facilitation to complete the school closure process. The staff should provide the committee with the board-approved document detailing the purpose and goals of the committee, school closure criteria and rubric, and information on fiscal, facilities, transportation, educational program, and demographic impacts on the district if various schools close.

The staff facilitators of the district consolidation committee should not be viewed as attempting to steer the committee to any particular decision. Meetings should be open, and proceed in a fair and equitable manner, considering the community culture to ensure all parties are represented and have a voice.

The committee chair should be elected by the group at the second meeting. The staff and chair should meet before each committee meeting to review the agenda and related data, making it easier for the chair to conduct the meetings effectively and efficiently.

Rank-Order Schools

This process may take a minimum of five meetings. The meetings should occur no more frequently than every two weeks; however, if the district wishes to expedite the time line, they could occur weekly although this would require a greater time commitment from committee members and staff.

If the committee is subject to the Brown Act, the agendas should follow the appropriate format, which is similar to a governing board meeting. This includes providing an opportunity for public comment for items that are included and not included on the agenda, time limits for speakers, and prohibiting the committee from taking action on items not on the agenda.

The meeting agendas and process that follows in this report reflect a more formalized and quantitative analysis approach to the committee's task. The district may wish to include some of the documents, but make more informal rankings without following a strict quantitative ranking formula. A combination of quantitative and qualitative judgment and ranking is probably the most effective and realistic way to approach this issue. However, it may be difficult for the public to understand that the final recommendation comes from a combination of objective, data-based decisions and other qualitative factors.

General Process

1. Philosophical/goal statements need to be reviewed and agreed on by the committee.
2. The appropriate staff members present the data that supports the factors to the committee.
3. The staff fills in the criteria ranking matrix or points-based system as data is presented to the committee. The matrix, which is used at each meeting, is filled in with the data and the resultant rank of each school.
4. The committee decides which factors ultimately are to be considered as part of the decision, checking to make sure that the factors and ranks continue to match the philosophical/goal statements.

5. The committee determines the weighting of each factor either by voting or discussing and coming to consensus. If numerous factors are used, it may be feasible to use a forced-choice method or other voting method. Alternatively, the committee could come to consensus or majority agreement on the importance of each factor.
6. Using the criteria ranking matrix, a weighting method will provide the final ranking of the schools. Alternatively, the points-based method provides for some less formal quantitative analysis, and the committee may be more comfortable with that.

Meeting Agendas and Process

Meeting No.1:

Welcome/Introductions

Committee roles and responsibilities

Time line/meeting schedule

- a. Committee agreement on its working principles and procedures, including Brown Act requirements, Robert's Rules of Order or other procedures that the district requires, member voting obligations, and agreement that the committee must work within the district's strategic plan or mission statement. The staff facilitator should discuss respectful committee meeting protocols, including listening and speaking, no cell phone use or other interruptions. (Sample staff memos for committee Meeting #1 packet are attached as Appendix A-4 to this report).
- b. Facilitators should explain the committee's general method and workflow.
- c. The committee should be informed to elect a chairperson at the start of the second meeting. Those interested should send in nomination information for themselves or someone else that they wish to nominate. The staff should include these nominations in the agenda packet for the second meeting.

Meeting No. 2:

- d. Election of chairperson and alternate chair: This should be by vote of committee members after those who wish to become chair give a statement.
- e. Philosophical/goal statements – staff presentation

Committee members and the public will be eager to begin looking at the numbers so they can evaluate their schools with others in the ranking process. However, it is important not to assume that everyone shares the same values. Philosophical or goal statements will provide the underpinning for later discussions and decisions on ranking order (A sample staff memo/explanation to committee and proposed philosophical/goal statements are attached as Appendix A-5 to this report).

Meeting No. 3-4, or as needed:

- f. At this point, numbers should not be loaded in the criteria ranking matrix, even though there will be demands for this data to be included. The staff may wish to present the rubric and a second sheet called the background matrix that includes data the committee eventually decides is important, but is not used in quantitative rankings. The committee will make decisions on the criteria at later meetings, and the criteria that are not approved are included in the background matrix and are not factored in the ranking (A sample criteria ranking matrix and background matrix are attached as Appendix B-1 to this report).
- g. Closure scenarios are presented that include the number of students who would attend the receiving schools and the classroom capacity to house additional students at each school. This should be completed in concert with the GIS services firm because the firm will be able to produce alternative scenarios and capacity impacts. This analysis should be completed for each school being considered for closure (A sample closure capacity analysis, in PowerPoint format, is attached as Appendix B-2 to this report).
- h. The facilities capacity scenario leads to a cost estimate of any classrooms that will need to be added to the receiving schools. The estimated cost savings for closure of each school should be completed for all elementary schools and presented in an easy-to-read format to the committee. District staff members such as the CBO should make the presentation and answer any committee member questions related to estimated cost savings of each school to be closed (A sample spreadsheet is attached as Appendix B-3 to this report).
- i. The maintenance director should provide information on the condition of the facilities and level of maintenance required at each school. Higher maintenance costs include older schools that have not been modernized and older portable classrooms. This information will be added to the matrix.

A distinction can generally be made between schools that have been renovated or modernized, either with state or local funds, and those that have not been modernized. If bond funds were not used, the school is a more likely candidate for closure. However, once school closure becomes an operating possibility, planned renovation work is often delayed. This appears to have occurred at Big Bear Elementary. It is important for the administration to acknowledge this and determine whether factors need to be adjusted for this situation.

- j. The maintenance director should provide information on costs anticipated to maintain a closed, unused school facility and site. This is an ongoing cost that should be deducted from the estimated cost savings.
- k. The transportation director should provide information on costs of transportation, a cost comparison for each of the elementary schools, and costs for each closure scenario. This factor could be reviewed as a change in the number of bus routes, daily miles, changes (additions or reductions) in transportation staff, and

other costs such as those for bus storage. Whatever factors are selected by the transportation director and CBO for cost comparison should be included into the criteria ranking matrix.

Meeting No. 5-6, or as needed:

- i. Facilities analysis
 - i. Current enrollment: This factor will identify the number of students and families who will be disrupted. Smaller schools will lead to fewer people disrupted, and these schools typically have a higher per-student operational cost because of set overhead personnel costs.
 - ii. Projected enrollment: A school experiencing growth may be seen as less viable for closure than a school with declining enrollment. The committee and the district should discuss the various reasons for declining enrollment, including the economic downturn.
 - iii. Capacity is seen in three different ways:
 1. Site size - The California Department of Education School Site Analysis, 2000 Edition, should be used as a guideline.
 2. Classrooms – The number of classrooms used compared to those that are vacant, including pull-out programs and storage. These should be counted as capacity.
 3. Core facilities – Completing a core facilities analysis can be complex. There should be a discussion about the effects on the receiving schools of the cafeteria/multipurpose room, kitchen, restrooms, library, parking, circulation, and play fields.
 - iv. Discussion and presentation of site size issues.
 - v. Discussion and presentation of core facilities at each school and the estimated need for additional core facilities as listed above. A core facilities analysis includes a review of CDE guidelines and applicable building codes. These need to be reviewed with an architect that is knowledgeable regarding the facilities conditions in the district. A review should also be completed with the child nutrition director regarding kitchen equipment and multipurpose room size issues (A sample worksheet on core facilities and site size is attached as Appendix B-4 to this report).

- vi. Facilities information: This factor includes the age of school and of any un-modernized portable buildings.

Meeting No. 5-7, or as needed:

- m. The staff fills in the criteria ranking matrix as data comes in according to the information given to the committee and the philosophical/goal statements. The criteria ranking matrix can be presented as an in-progress document in these meetings.
- n. The special education director should present information to the committee regarding special education programs. This should include effect on students and program, facility costs to remodel receiving schools and any additional transportation costs.
- o. The education services administrator should present the committee with information on education programs and locations, including the effect on services and any possible loss or change in revenue for Title I or other programs.
- p. The discussion should also include the one-time costs that will occur, including any facilities/portables relocation, renovation or construction.

Meeting No.____, or as needed:

- q. The transportation director should present information on transportation impacts including route changes, costs, and waiting and driving times for each closure scenario. This should be part of the Criteria Ranking Matrix, and can include additional detailed background information as provided by the transportation director.
- r. The staff presents information provided by the GIS firm regarding distance factors.
- s. The staff presents information on neighborhood density, including the percentage of students living within one mile of each school and the percentage of students attending each school who also live in the attendance area. These factors provide a sense of which schools are neighborhood schools, and the amount of disruption for the students who attend and reside in that attendance area. The committee may decide not to include these factors in the final Criteria Ranking Matrix.

Future Meetings: Any additional meetings for continuing discussion of factors.

Meeting No.____:

- t. The next step is to decide the weight of each factor. For example, while test scores may be deemed important, they may be weighted less heavily than facility capacity or condition because scores are relatively high at all district schools. This weighting can be done qualitatively, but quantitative weighting will provide more objective and data-driven decisions.

- u. This can be a difficult step for the committee because some individuals may calculate where their individual school stands in the rankings and try to influence the outcome.
- v. The facilitators may wish to vote on the importance of each factor. Numerous weighting and ranking methods can be utilized, including a forced-choice method in which each factor is voted on against each of the other factors. Because of the details in this method, it is not included with this report, but FCMAT can provide a how-to guide upon request.

The forced-choice voting method provides fairness and a guarantee that every committee member's vote counts. It also forces the committee members to make final prioritization decisions so that schools can be ranked as possible closure candidates.

Once the committee votes on the factors, they are placed into the Voting Factor sheet and percentages are included on the weighted matrix. The Weighted Matrix reflects the ranking of the schools as a summary that should be included with the report/recommendation to the governing board. (A sample worksheet of the voting factors prior to a vote is attached as Appendix B-5 to this report, and Appendix C-1 includes a sample voting factors list after the committee vote has occurred. A sample Weighted Matrix by School is also attached as Appendix C-2 to this report).

Ranking Method: The district may wish to complete a formal ranking such as what has been provided in the sample documents. An alternative is to use a points-based method, with schools ranking as one through five for more or less impact on each matrix factor. This is more subjective as committee members may disagree with each other and the staff on what it means to be "somewhat" impacted, etc.; however, it can be a very effective and less formal approach (Worksheets using this less formal method are attached as Appendix E to this report).

Recommendations

The district should:

1. Determine whether the district consolidation committee is subject to the Brown Act.
2. Determine whether the district consolidation committee will utilize a formal or informal ranking procedure.

Student Support Facilities

The district requested that FCMAT review its student support facilities and recommend changes to improve facilities and provide more efficient and effective operations while providing effective working conditions for its employees. The public does not always value expenditures of funds on activities that are perceived as being away from the classroom. Therefore, it is important for the district to consider public perception in weighing the benefits of reconfiguring support facilities. It may be prudent to delay any administrative or student support facility changes until the parcel tax or school closure process is completed.

The current needs identified by the district staff are as follows:

1. The Maintenance and Operations Department needs a training/staffroom/meeting room space. The department is located in the former bus barn at Big Bear Elementary School, which consists of a two-person office for the director and clerical position and an open space for equipment, tools and vehicles. There is no separate heated room for vendor presentations, meetings, and staff development trainings.
2. The Information Technology Department (IT) has inadequate housing at the district's central administrative facility. Department space consists of one office, one small server room, and a recently-added outside storage container. The staff has inadequate space for computer work and repair, and component and equipment storage. The server space is cramped, provides no room for servicing equipment, and needs more up-to-date temperature control to avoid system breakdown and provide for longer equipment life.
3. The board room in the central administrative facility serves as the district's only conference room and is heavily used. It has a moving partition wall used to divide the space into two smaller spaces, but lacks adequate ingress and egress. This requires individuals to squeeze through a narrow, non-ADA-compliant entrance or to walk through the superintendent's office to get from one space to the other. The facility could benefit from an additional meeting space with adequate ingress/egress. Overall, the central administrative office is a clean, modern, and centrally-located facility and should continue to be used for this purpose.
4. Two to three buses were recently relocated to the Transportation Department facility near Big Bear High School because of air quality issues at Big Bear Elementary School. These buses are used for transporting students from the western portion of the district. Therefore, this relocation has caused an increase in transportation costs because of the additional trips made without passengers.
5. The student attendance/safety officer is housed at the Transportation Department, but would more appropriately be located at the central administrative offices close to the individual's supervisor and other staff members with whom this position works.
6. Child Nutrition Department facilities are located at Big Bear Elementary School, close to the Maintenance and Operations Department. This facility has the benefit of having adequate space, but the space does not comply with the Americans with Disabilities Act (ADA) and should be upgraded. The steep terrain of the school site makes it difficult to provide simple solutions to achieve ADA compliance.

Recommendations

The district should:

1. Avoid making any changes to student support facilities at the same time as a school closure process or parcel tax measure.
2. Consider the following changes only after school closure and/or parcel tax activities have been completed and when appropriate funding is available:
 - a. If a school is closed, consider converting it to a student support facility, housing maintenance and operations in a small portion of the school and using one classroom as a maintenance-and-operations meeting/staff training/conference room.
 - b. Reconfigure the central administrative office to more efficiently house and increase the square footage provided to the Information Technology Department. This could be accomplished by relocating the Special Education Department to a closed school site or by adding a portable building to the central office facility.
 - c. Continue to house the district's main server room in the central administrative office and install a new micro-system air conditioner in that room.
 - d. Reconfigure the board room so that ingress/egress issues are better designed. This may include reconfiguration of doors and hallways.
 - e. Expand the amount of the district's meeting room/staff training room space by providing two classrooms at a closed school site or other school facility.
 - f. If Big Bear Elementary School is chosen for school closure, consider expending part of the remaining general obligation bond funds to provide ADA access at the lower part of the site for student support functions. The district should obtain a legal opinion to ensure that bond funds can be spent on the site after school closure, consult with an architect/engineer to obtain a cost estimate of the ADA and access improvements, and weigh the benefits of continued use of the site with potential costs. A cost estimate should also be completed to assess which is more cost-effective: relocating the Child Nutrition Department to the upper portion of Big Bear Elementary School or constructing ADA access to the lower portion of the school. The district should include this information as part of the school closure plan so that it is disclosed during the school closure process.

Appendices

Sample Memoranda/Letters

Appendix A-1 – Sample Staff Memo for Board Meeting to Propose District Consolidation Committee

Appendix A-2 – Sample Invitation Letters from Superintendent Seeking Parents/Community Members for Committee

Appendix A-3 – Sample District Consolidation Committee and Process Information Sheet

Appendix A-4 – Sample Staff Memos for DCC Meeting #1 Packet

Appendix A-5 – Sample Philosophical/Goal Statements

Analysis/Evaluation Documents

Appendix B-1 – Sample Draft School Closure Ranking Criteria Matrix

Appendix B-2 – Sample Closure Capacity Analysis – PowerPoint

Appendix B-3 – Sample Estimate of School Closure Savings

Appendix B-4 – Sample Core Facilities Analysis

Appendix B-5 – Sample Worksheet of Voting Factors

Appendix C-1 – Sample Voting Factors (after DCC vote)

Appendix C-2 – Sample Weighted Comparison Matrix

Appendix D – Sample Board Resolution on School Closures

Appendix E – Sample Alternative (Less Formal) School Closure Scoring Rubric

Study Agreement

Appendix A-1

Sample Staff Memo for Board Meeting to Propose District Consolidation Committee

Memorandum

Date:

To: Governing Board

From: Superintendent

The district is investigating options for budget cuts that will be necessary to achieve a balanced budget by June 30, _____. Staff proposes that because all options should be reviewed, the board should consider adopting a school closure study process.

While typically a district may consider school closures because of declining enrollment, the current state budget crisis has caused many districts to consider this option to provide budget savings even if declining enrollment is not a significant factor. School closures are emotional and cause major disruption to students, staff, families and the community, so it is important for the board to make decisions based on a fair and open process. Therefore, staff/administration proposes a committee process to provide a rank order of schools for possible closure if the Governing Board decides to close a school or schools.

State law does not include requirements for how a district may decide whether or not to close a school. However, the California Department of Education provides the Closing a School Best Practices Guide, which includes a recommendation for a community-based committee. This committee would review the various factors that would typically be a part of the decision and would provide a recommended ranking of schools to the Governing Board.

Staff/administration propose the establishment of a District Consolidation Committee (DCC) comprised of a wide range of individuals including parents, teachers, school staff, principals and community members. The committee would begin meeting on _____ and would be charged with providing a recommendation to the board on a rank ordering of schools to be closed if the decision to close one or more elementary schools is made. This DCC would not be recommending whether or not to close schools as a budget savings measure, but would only be providing a recommended ranked order if the board decides that school closure is necessary.

Staff proposes the following committee composition:

- One parent from each elementary school, selected by each school principal or by PTA, and approved by the principal
- One teacher from each elementary school, selected by the certificated bargaining unit
- Two classified employees that are not from the same elementary school, selected by the classified bargaining unit
- One principal from a school that is not affected by closure (for example, the middle or high school), selected by the superintendent

- The special education director
- Two to three community members from entities such as an educational foundation, City of Big Bear planning, community or economic development staff, Chamber of Commerce, Citizens' Oversight Committee. Representatives from any of these constituencies should be selected by their membership.

The committee will be co-facilitated by Walter Con, Director of Business Services, and Tim Larson, Director of Personnel/Educational Services. The committee will be governed by the Brown Act, meaning that all meetings are open public meetings, the meeting agenda and minutes are approved formally, and the method of public comment and discussion are regulated by state law.

The committee will meet on the following dates and time and at the following location:

All meetings will start at ___ p.m.

_____ School Gymnasium

Address

Dates of Scheduled Meetings _____

The committee would have a recommended rank ordering of schools for the Governing Board meeting to be held on _____, 2011. Staff recommends approval. Thank you.

Appendix A-2

Sample Invitation Letters from Superintendent Seeking Parents/Community Members for Committee

(Adapt as needed for specific organizations and use Bear Valley USD letterhead)

Date

Dear Parent and Elementary School Principal:

On _____, the Bear Valley Unified School District Board of Education, at its regular meeting, voted to approve the formation of a District Consolidation Committee. This committee will be comprised of a wide range of individuals including parents, teachers, school staff, principals and community members. The committee will meet starting in _____ 2011 and is charged with providing a recommendation to the board on a rank ordering of schools to be closed if the decision to close one or more elementary schools is made.

This letter is a request for interested parent volunteers from your school. We are sending this letter to the school principal, who should distribute it to your PTO/PTA as well as let all parents know about this through telephone, posting and any other means deemed necessary by the principal.

All names for possible committee membership must be submitted through the school principal to the _____ Department, to (email address of responsible staff person) or by telephone at (telephone number), no later than day, date, time. Final notifications will be made on (day, date). Names sent directly to the _____ Department will be rejected. If you are interested, please submit your name to your school principal. Please include your name, email address, mailing address and telephone number where we can reach you during the day.

We would ask that your parent representative be chosen in one of two ways: either the principal of the school may choose a representative, or if a school submits multiple names, the _____ Department will hold a lottery and choose a random name. This will take place on _____. You may want to choose one representative and one alternate who would be able to fill in if the regular parent representative cannot attend a meeting. The name of the alternate must also be submitted no later than 5 p.m. on (day, date, 2011) to the _____ Department at the email and telephone numbers listed above.

If a school does not submit a parent representative, the remaining schools may not have an increased number of representatives. The total parent representation will be decreased instead.

The board approved the following committee composition:

- One parent from each elementary school, selected by each school principal or by the PTA, and approved by the principal
- One teacher from each elementary school, selected by the certificated bargaining unit
- Two classified employees that are not from the same elementary school, selected by the classified bargaining unit
- One principal from a school that is not affected by closure (for example the middle or high school), selected by the superintendent
- The special education director
- Two to three community members from entities such as an educational foundation, City of Big Bear planning, community or economic development staff, Chamber of Commerce, Citizens' Oversight Committee. Representatives from any of these constituencies should be selected by their membership.

The committee will be co-facilitated by Walter Con, Director of Business Services, and Tim Larson, Director of Personnel/Educational Services, of the Bear Valley Unified School District. A chairperson of the committee will be voted on by committee members during the second meeting. The committee will be governed by the Brown Act, meaning that all meetings are open public meetings, the meeting agenda and minutes are approved formally, and the method of public comment and discussion are regulated by state law.

The committee will meet on the following dates and times. All meetings will be held starting at _____ p.m. Your parent volunteer from your school should be able to attend all of the following meetings (or select an alternate):

All meetings to start at _____ p.m.

Tentative location is the _____ School Multipurpose Room

(Address)

(Day, date of each meeting)

The committee is scheduled to have a recommended rank ordering of schools for the Governing Board meeting to be held on (day, date, and time).

School closures are one possible avenue of budget cuts that the board must decide on for the coming year. As the state of California continues to cut the education budget, all school districts in the state are being forced to make significant budget cuts to remain solvent.

We will not know how much our budget will need to be cut until the governor presents his tentative budget in January 2011. However, we project that the state may cut an additional \$_____ million from the district budget. School closures may be one way to help close the budget gap.

We look forward to working with you on this important issue.

Sincerely,

Superintendent

Appendix A-3

Sample District Consolidation Committee and Process Information Sheet

(Place on Bear Valley USD letterhead and translate as needed)

Date _____

On _____, the Bear Valley Unified School District Board of Education, at its regular meeting, voted to approve the formation of a District Consolidation Committee. This committee will be comprised of a wide range of individuals including parents, teachers, school staff, principals and community members. The committee will meet starting on _____ and is charged with providing a recommendation to the board on a rank ordering of schools to be closed if the decision to close one or more elementary schools is made. This DCC will not be recommending whether or not to close schools as a means to provide budget savings, but will only be providing a recommended ranked order if the board decides school closure is necessary.

The board approved the following committee composition:

Category of Representative	Total Number in this Category
One parent from each elementary school	Four parents
One teacher from each elementary school (selected by teachers' association)	Four teachers
Two classified staff not from the same school site (selected by classified association)	Two classified staff
Middle School Principal or High School Principal	One principal
Special education director	One administrator
One community member	One community member
One business person from community	One business person
Once city staff or council member	One city representative

The committee will be co-facilitated by Walter Con, Director of Business Services, and Time Larson, Director of Personnel/Educational Services, from the Bear Valley Unified School District. The committee will be governed by the Brown Act, meaning that all meetings are open public meetings, the meeting agenda and minutes are approved formally, and the method of public comment and discussion are regulated by state law.

The committee will meet on the following dates, times and location.

All meetings will start at _____ p.m.

_____ School Gymnasium, (Address)

_____ 2011 – Meeting #1

(Include dates of scheduled meetings)

The committee is scheduled to have a recommended rank ordering of schools for the Board of Education meeting to be held on _____.

Please contact _____ at (email address) or call at (telephone number) if you have questions.

Thank you.

Appendix A-4

Sample Staff Memos for DCC Meeting #1 Packet

LETTERHEAD

MEMORANDUM

DATE:

TO: District Consolidation Committee

FROM:

RE: District Consolidation Committee Overview and Time Line

The Governing Board of the Bear Valley Elementary School District, at its regular meeting on _____, approved the formation of a District Consolidation Committee. The DCC was approved as a Superintendent-appointed committee, with the Board approving the general categories and number of members.

The Board directed that the committee's purpose is to provide a recommendation to the Board on a rank ordering of schools to be closed if the decision to close one or more elementary schools is made. The Committee has not been asked by the Board to make a recommendation on whether or not to close schools.

The Board also agreed that DCC meetings are to be operated under the requirements of the Brown Act. In accordance with that Act, all meetings are to be posted and open to the public, meeting agendas are to be posted no later than 72 hours prior to the meeting, all actions and decisions of the committee are to be made in the public view at the meetings, and there is to be an opportunity for public comment at each meeting.

The meeting agendas will be posted on the District's website at www._____ and will be posted at all schools and sites. Because of the need for timely decisions in response to anticipated budget cuts from the State, Superintendent _____ has directed that this Committee complete its work and provide a ranking recommendation to the Board at the _____ regular Governing Board meeting.

Meetings of the DCC are scheduled as follows. All meetings are currently scheduled to be held at the _____, with location subject to change. All meetings will start at _____.

Future Meetings:

Meeting #2 _____

Meeting #3 _____

Meeting #4 _____

AND FUTURE MEETINGS: TBD

The Superintendent and Board asked that a recommendation from the DCC be submitted to the Board at its regular meeting on _____. It is up to the Board whether they vote to adopt the recommendation at that meeting or at a later meeting, or they may decide to take it as information and not vote on it.

District Consolidation Committee Meeting #1**Overview and Time Line****Date****Page Two of Two**

If the Board eventually decides to close one or more elementary schools, the District would then go through a boundary change process. This process will likely include community meetings and public hearings to provide information and obtain public input, presentations of different boundary scenarios and eventually Board approval of boundary changes. It is unknown when this would occur, but would need to be finalized as soon as possible in order to have adequate time to provide information to parents and staff, as well as to prepare for the implementation of the closure in time for the end of the school year.

Throughout the spring, the District will be grappling with the requirement to make budget cuts in order to have a balanced budget by June 30, _____, a requirement of State law. School closures are one option in a list of possible options for budget savings in order to maintain district fiscal solvency.

(The Budget Advisory Committee meets frequently in order to provide recommendations to the Board for budget cuts and will be the actual body recommending whether to close schools or not. The current Budget Review spreadsheet used by the Budget Advisory Committee and Board of Education is attached for your reference.) ***If applicable here, give an option for talking about the budget in general and the budget process.***

An information sheet that has been developed by the District is included for your use and reference.

The California Department of Education has produced a document on school closure best practices, which is available on their website at <http://www.cde.ca.gov/ls/fa/sf/schoolclose.asp> The document has been attached for your use and reference. It should be noted that this document was prepared with the assistance of Vacaville Unified School District staff.

If you would like copies of any information referenced here, or have questions or need additional information, please contact _____, Bear Valley Unified School District (telephone _____, email _____).

LETTERHEAD

MEMORANDUM**DATE:**

TO: District Consolidation Committee
FROM: Walter Con, Director, Business Services
DCC Co-Facilitator

RE: Brown Act Booklet

Attached please find a booklet explaining the Ralph M. Brown Act (California Government Code Sections 54950 through 54963) which governs public agencies in the State and how they conduct business.

The Board of Education voted to approve the formation of the District Consolidation Committee as a Brown Act committee, appointed by the Superintendent. As such, committee members are bound to certain requirements and are asked to review this booklet.

Staff will provide an overview of the major provisions of the Brown Act at the meeting.

Thank you.

Appendix A-5

Sample Philosophical/Goal Statements

MEMORANDUM

DATE:

TO: District Consolidation Committee (DCC)

FROM: (Staff Facilitators)

**RE: Proposed Philosophy/Goal Statements for the School Closure Analysis Process
Meeting #2, _____ (date), 2011**

One systematic way of helping to decide on an order of schools for closure is to evaluate each school using an established set of criteria developed by the district and appropriate stakeholder groups to assess each school's feasibility and impacts if it were to be closed. By ranking these criteria according to the district's philosophical/policy goals or objectives, the DCC and the board can score each school in a meaningful manner and arrive at a justifiable basis for the school closure decision.

To decide on the factors used and how to rank them, the DCC should first reach agreement on the goals that we want to strive toward in making the rank ordering decisions. At Meeting #1, we took an introductory look at what a matrix might look like eventually, but first we need to reach agreement on what we believe are the goals that should be achieved for a possible closure.

Below is a goal statement and the factors or data that we would be considering to rank the schools. Please keep in mind that these are draft statements and can be changed, added to or subtracted from. Also, please keep in mind that the ranking will be made up of a synthesis of all factors, not any one factor alone.

It is very important to realize that as much as we can quantify the factors, there are many implications and effects of each closure scenario. One change will cause ripple effects of other changes, and the committee members will be asked to evaluate many of these ripple effects.

It is proposed that we go through these one by one and either vote on each individually or as a group. We have included this item as an action item so the committee has the flexibility to vote on individual items or on the whole at this meeting or the next meeting. After there is agreement on these philosophy/goal statements, the ratings of each factor can be done to match the philosophical goals.

(Each of the philosophical/goal statements would be presented in larger type on individual sheets – see sample below after listing of all statements.)

**Fiscal Impacts:
Philosophical/Goal Statement #1**

- Save the maximum amount of general funds possible by closing the school with the highest operating costs per student, including personnel, maintenance and utilities.

Factors to evaluate (in matrix):

1. Non-teaching personnel costs per student or other unit
2. Utilities costs per student
3. Other operating costs per student

Background information needed to obtain the above factors:

1. One-time facilities costs* (ties to Statement #2 below, Item #5).
2. One-time other costs such as moving*

*These are needed to determine net estimated cost savings of school closure.

**Facilities Impacts:
Philosophical/Goal Statement #2**

- Provide adequate amount of classroom space for all students by closing the school whose adjacent schools have adequate classroom space to house the incoming students.
- Provide adequate acreage for all students by closing the school that has adjacent schools with adequate acreage to hold the incoming students.
- Provide adequate core facilities for students by closing the school that has adjacent schools with adequate core facilities to hold the incoming students.

Factors to evaluate (in matrix):

1. Ability of the adjacent receiving schools to house incoming students in current existing classrooms
2. Ability of the adjacent receiving schools' acreage to accommodate incoming students
3. Ability of the adjacent receiving schools' core facilities to accommodate incoming students

Background information needed to obtain the above factors:

1. Classroom capacity (at current 24:1 and potential 30:1 ratio or other)
2. Number of classrooms needed to house incoming students

3. Number of portable classrooms that would have to be added to house students in receiving schools (classroom impact)
4. Site acreage and its comparison to CDE School Site Analysis and Guidelines acreage recommendations
5. Site capacity based on acreage
6. Core facility capacity
7. Classroom utilization percentage (enrollment to classroom capacity at 30:1 student-teacher ratio)
8. Site utilization percentage (enrollment to site capacity)
9. Core facility utilization percentage (enrollment to core facility capacity)

Facilities Impacts:

Philosophical/Goal Statement #3

- Provide adequate facilities for all students by closing the school whose adjacent schools are adequate in condition.

Factors to evaluate (may be condensed in matrix):

1. Year school was built or modernized
2. Percentage of permanent and portable classrooms
3. Number of leased portable classrooms
4. Number of portable classrooms over 20 years of age or not modernized

Background information also needed to obtain the above factors:

1. Number of permanent classrooms
2. Number of portable classrooms and ownership
3. Maintenance costs explanation

Facilities Impacts (Also Educational Impacts):

Philosophical/Goal Statement #4

- Provide education and services for special education (special day class) students in an appropriate environment with adequate facilities in receiving schools.

Factors to evaluate (in matrix):

1. Ability of schools to provide services to special education students from closed schools

Background information needed to obtain the above factors:

1. Number and category of affected SDC students per school
2. Classroom capacity of all schools, not just adjacent schools
3. Analysis and explanation from special education director/department

**Enrollment Impacts:
Philosophical/Goal Statement #5**

- Cause the least amount of disruption possible by closing the school with the lowest enrollment.

Factors to evaluate:

1. General Enrollment (October 2010)
2. One-year projected enrollment

Background Information:

1. Five-year projected enrollment

**Educational Program Impacts:
Philosophical/Goal Statement #6**

- Provide students with education in higher-performing schools by closing the school with the lowest academic performance.

Factors to evaluate:

1. 2010 Academic Performance Index (API) score
2. Percent gain 2009 to 2010 (one-year change) in Adequate Yearly Performance (AYP) in English/language arts and in math
3. Percent gain 2005 to 2010 (five-year change) in AYP in English/language arts and in math

**Educational Program Impacts (Also Facilities Impacts):
Philosophical/Goal Statement #7**

- Provide students with the education and services they currently have as much as possible by closing the school that has adjacent or other schools that can provide those services and programs for the receiving students.

Factors to evaluate:

1. Ability of schools to provide other services to students from closed schools
2. Special program funding transferability to receiving schools

Background information needed to obtain the above factors:

1. Classroom capacity of adjacent schools
2. Program information on all programs, including, but not limited to: Title I, GATE (other special programs) (see Glossary of Terms and Acronyms)

**Transportation/Distance/Safety Impacts (Also Facilities Impacts):
Philosophical/Goal Statement #8**

- Provide education and services for general education students and special education students in a manner that provides goals of classroom dispersal balanced with transportation costs and types and numbers of classes needed.

Factors to evaluate:

1. Ability of schools to provide services to students from closed schools

Background Information needed to obtain the above factors:

1. Number and category of affected students per school
2. Transportation analysis from transportation department

**Transportation/Distance/Safety Impacts (Also Facilities Impacts):
Philosophical/Goal Statement #9**

- Keep students as relatively close as possible to their neighborhood.

Factors to evaluate:

1. Number of students living within one mile of school
2. Percentage of students living within one mile of school
3. Percentage of students who live within attendance area
4. Average distance traveled to school per student

Background information needed to obtain the above factors:

1. Intradistrict transfers
2. Interdistrict transfers
3. Open enrollment
4. Title I parent choice transfers

**Transportation/Distance/Safety Impacts (Also Facilities Impacts):
Philosophical/Goal Statement #10**

- Ensure that students have to cross the fewest major physical barriers possible, such as multilane arterial roads.
- Ensure that additional transportation costs (if any) are minimized.

Factors to evaluate:

1. Number of major roads and freeways that students from closed school would need to cross to reach receiving schools

2. Change in number of bus routes and transportation costs associated with the potential boundary change and school closure

Background information needed to obtain the above factors:

1. Spreadsheet of current bus routes, number of buses, costs per unit (mile, student)
2. Spreadsheet of potential bus route changes, change in number of routes needed and changes in number of daily miles, students
3. Discussion of bus fees

(All of the philosophical goal statements above can be presented on individual sheets so that committee members can understand each type of factor and make notes on each sheet. As the committee decides to add, delete or change the factors that they wish to review, the changes should be noted by using the “editing” mode, shown below.)

Sample Philosophical/Goal Statement

Fiscal Impacts:

Philosophical/Goal Statement #1

- Save the maximum amount of general funds possible by closing the school with the highest operating costs per student, including personnel, maintenance and utilities.

Factors to evaluate (in matrix):

1. Non-teaching personnel costs per student or other unit
2. Utilities costs per student
3. Other operating costs per student

Background information needed to obtain the above factors:

1. One-time facilities costs* (ties to Statement #2 below, Item #5)
2. ~~One-time other costs such as moving*~~ (This was deleted as a factor by the Committee during Meeting #3.)

*These are needed to determine net estimated cost savings of school closure.

Appendix B-1

Sample Draft School Closure Ranking Criteria Matrix

Sample Draft School Closure Ranking Criteria Matrix BEAR VALLEY UNIFIED SCHOOL DISTRICT - SAMPLE NUMBERS AND RANKINGS ONLY FOR DEMONSTRATION PURPOSES

Draft # _____
District Consolidation Committee Meeting # _____ (date)

Criteria/Elementary School	BALDWIN LANE ELEMENTARY	BALDWIN LANE RANK	BIG BEAR ELEMENTARY	BIG BEAR RANK	FALTSVALE ELEMENTARY	FALTSVALE RANK	NORTH SHORE ELEMENTARY	NORTH SHORE RANK	COMMENTS
Fiscal Information									
Estimated Cost Savings Per Student	\$729.35	7	\$678.11	10	\$743.65	6	\$699.22	9	
Facilities Information									
Ability of Receiving Schools to Accommodate Students in existing CR's	Adequate	0	Adequate	0	Adequate	0	Adequate	0	Estimated at 30:1 ratio
Ability of Receiving Schools to Accommodate Students in Core Facilities	Adequate	0	Adequate	0	Adequate	0	Adequate	0	
Ability of Receiving Schools to Accommodate Students in Core Facilities Year Modernized	129.6%	6	150.5%	10	111.7%	2	111.9%	3	
Number of Permanent Classrooms	2003	0	2007	0	2007	0	2007	0	Modernization Dates
% Permanent CR's	19	0	20	0	20	0	19	0	
Number of Portable Classrooms	65.5%	6	50.0%	3	60.6%	5	51.4%	4	
% Portable CR's	10	0	20	0	13	0	18	0	
Number of Leased (non-owned) portable classrooms	34.5%	0	50.0%	0	39.4%	0	48.6%	0	
% of Portable CR's Over 20 Year Old and Not Modernized	0	0	0	0	0	0	0	0	
# of Portable CR's Over 20 Year Old and Not Modernized	0	0	0	0	0	0	0	0	
Enrollment/Demographic Information									
Enrollment Gen. Ed. Only (Oct. 02, 2010)	588	5	919	10	798	7	880	9	
Educational Information									
2010 Academic Performance Index (API) Score	849	7	861	8	822	6	863	9	
Percent Gain 2009 to 2010 AYP English/Language Arts	-0.40%	0	7.70%	0	7.80%	0	1.70%	0	
Percent Gain 2009 to 2010 AYP Math	2%	0	-1.60%	0	1.40%	0	-1.50%	0	
Percent Gain 2005 to 2010 AYP English/Language Arts	13.50%	3	15.30%	6	16.80%	7	12.00%	2	
Percent Gain 2005 - 2010 AYP Math	15.70%	5	10.80%	3	18.20%	6	9.50%	2	
Ability of receiving schools to provide services to Special Education Students	0	0	0	0	0	0	0	0	
Transportation/Distance Information									
# of Students Living within One Mile of School (road mile)	791	3	717	2	1387	9	1172	7	
# of Enrolled Students Living within One Mile of School (road mile)	415	4	547	6	618	9	689	10	
% of Enrollment Living in Attendance Area	67.7%	3	86.7%	10	76.4%	6	75.4%	5	
% of students Living within One Mile of School (road mile)	70.6%	5	59.5%	1	77.4%	6	78.3%	7	
Number of Major Roads/Freeways/inter-ped-friendly within One Mile of School	0	0	1.263	0	0.814	0	0.702	0	Does not include Interdistrict
Average distance traveled to School per student (in road miles)	0.886	0	1.0	0	1.3	0	1.8	0	From GIS Files
Distance to Nearest School (Road Miles)	1.0	0	1.0	0	1.3	0	1.8	0	
Nearest School(s)	school name		school name		school name		school name		
COMPOSITE SCORE		54		69		69		67	
LOW SCORE HAS HIGHEST CLOSURE RANKING.									

Appendix B-2

Sample Closure Capacity Analysis – PowerPoint

Sample Closure Capacity Analysis for DCC Bear Valley Unified School District

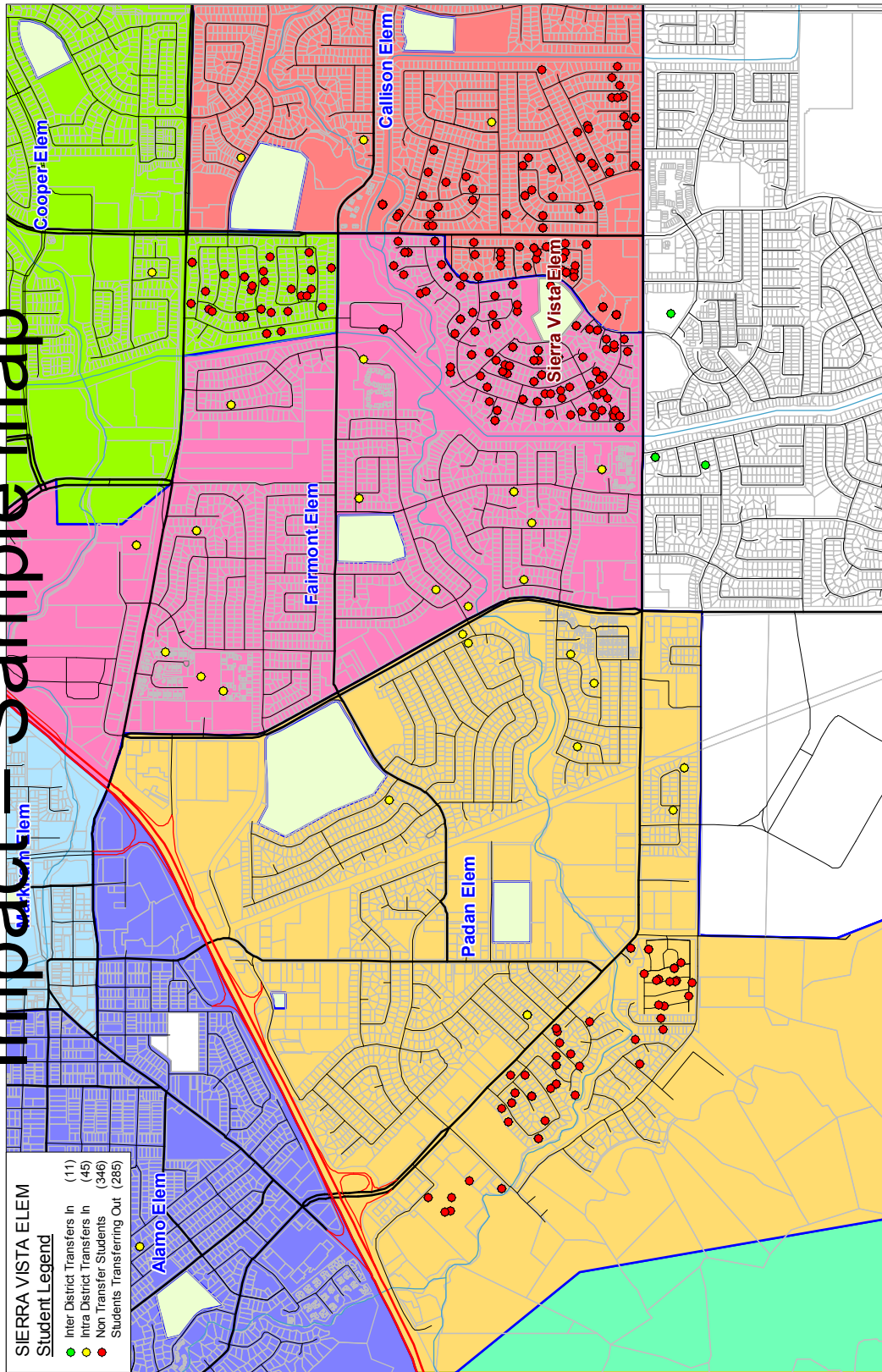
(This shows a map and an analysis for two schools only. All four school's analyses would be needed.)

Bear Valley Unified School District

- Elementary School Closure Scenarios
 - Baldwin Lane
 - Big Bear Elementary
 - Fallsvale
 - North Shore
- Classroom Loading Assumptions
 - 24:1 for K-3
 - 30:1 for K-3

Baldwin Lane Elem. Closure

Impact - Sample map



Baldwin Lane School Closure Impacts – sample numbers only at 24:1 student:teacher ratio

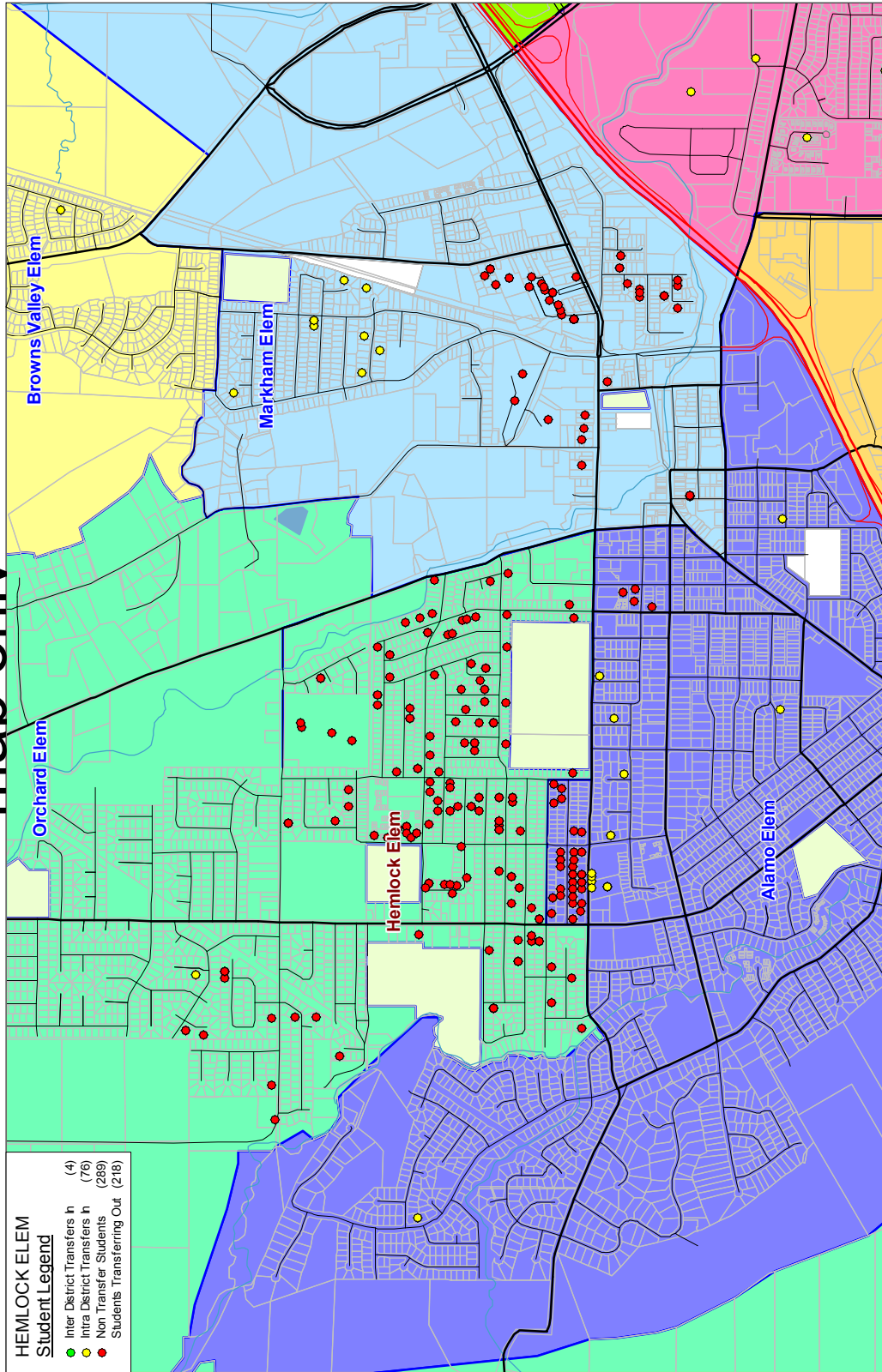
School Impacted	Students		Students Returned	Total Impact	Projected Enrollment	(24:1)	
	Re-Assigned	Re-Assigned				Facility Capacity	Classrooms Needed
Big Bear Elem	131	6	137	935	912	Impacted	
Fallsvale	35	1	36	905	936	None	
North Shore	118	21	139	639	654	None	
TOTALS	284	28	312				

Baldwin Lane Elem. School Closure Impacts – sample numbers only at 30:1 student:teacher ratio

School Impacted	Students		Students Returned	Total Impact	Projected Enrollment	(30:1)	
	Re-Assigned	Re-Assigned				Facility Capacity	Classrooms Needed
Big Bear Elem	131	6	137	935	1050	None	
Fallsvale	35	1	36	905	1080	None	
North Shore		21	139	639	750	None	
TOTALS	166	28	312				

Big Bear Elem. Closure Impact -- sample

map only



Big Bear Elem School Closure Impacts – sample numbers only

School Impacted	(Red Dots) (Yellow Dots)		Total Impact	Projected Enrollment	(24:1) Facility Capacity	Classrooms Needed
	Students Re-Assigned	Students Returned				
Baldwin Lane	46	18	64	660	654	Impacted
Fallsvale	88	9	97	965	948	Impacted
North Shore	155	3	158	553	444	4 CR
		11	11	920	1032	None
TOTALS	289	76	365			

Big Bear Elem School Closure Impacts – sample numbers only

School Impacted	(Red Dots) (Yellow Dots)		Total Impact	Projected Enrollment	(24:1) Facility Capacity	Classrooms Needed
	Students Re-Assigned	Students Returned				
Baldwin Lane	46	18	64	660	654	Impacted
Fallsvale	88	9	97	965	948	Impacted
North Shore	155	3	158	553	444	4 CR
					1032	None
TOTALS	289	76	365			

Appendix B-3

Sample Estimate of School Closure Savings

BEAR VALLEY UNIFIED SCHOOL DISTRICT 2010/11 ESTIMATE OF SCHOOL CLOSURE SAVINGS (SAMPLE NUMBERS ONLY)

Prepared: DATE

Prepared by: Business Department, Bear Valley Unified School District

	SCHOOL	FTE	SCHOOL	FTE	SCHOOL	FTE	SCHOOL	FTE
PRINCIPAL	\$ 129,027.00	1.00	\$ 127,282.00	1.00	\$ 123,214.00	1.00	\$ 116,771.00	1.00
ASST.PRINCIPAL	\$ -		\$ -		\$ 69,291.00	0.60	\$ -	
SECRETARIES	\$ 123,386.00	2.00	\$ 75,026.00	1.50	\$ 153,205.00	2.80	\$ 114,576.00	2.00
LIBRARY CLERKS	\$ 24,718.00	0.50	\$ 24,170.00	0.38	\$ 33,099.00	0.75	\$ 27,679.00	0.50
HEALTH CLERK	\$ 11,613.00	0.38	\$ 10,329.00	0.25	\$ 14,103.00	0.50	\$ 12,001.00	0.38
NOON DUTY	\$ 22,805.00	1.26	\$ 9,934.00	0.86	\$ 30,633.00	1.75	\$ 20,438.00	1.04
CUSTODIANS	\$ 107,873.00	2.00	\$ 105,847.00	1.75	\$ 135,011.00	2.50	\$ 160,992.00	2.50
50% UTILITIES	\$ 29,441.00		\$ 33,298.00		\$ 49,618.00		\$ 43,969.00	
75% TELEPHONES	\$ 764.00		\$ 1,498.00		\$ 977.00		\$ 1,251.00	
	\$ 449,627.00		\$ 387,384.00		\$ 609,151.00		\$ 497,677.00	
Oct 2010 CBEDS Enrollment	593		406		882		519	
Overhead/Student	\$ 758.22		\$ 954.15		\$ 690.65		\$ 958.92	

Notes:

- 1) FTE = Full Time Equivalent
- 2) 50% Utilities assumes some electrical and natural gas power remains to maintain buildings
- 3) 75% telephones assumes some amount of telephone usage for main line connect, fire alarm and intrusion alarm

Appendix B-4

Sample Core Facilities Analysis

CORE FACILITIES ANALYSIS: BIG BEAR ELEM CLOSURE -- SAMPLE NUMBERS ONLY -- THIS WOULD BE DONE FOR EACH SCHOOL CONSIDERED FOR CLOSURE

	A	B	C	D	E	F	H	I	J
	IMPACTED SCHOOLS	GEN. ED. CLASSROOM CAPACITY (B+C)	CURRENT ENROLL. STUDENTS	ADDITIONAL STUDENTS	PROJECTED ENROLLMENT (FROM CLOSURE SCENARIOS)	UNHOUSED STUDENTS* (E-B)	CURRENT CORE FACILITIES MAXIMUM ENROLLMENT (FROM MASTER PLAN TABLE 22)	% PROJ. ENROLLMENT TO ADEQUATE CORE FACILITIES	CORE FACILITY COMMENTS
1	BALDWIN LANE	750	588	110	706	-44	531	133.0%	This would be above historical maximum enrollments. Increased lunch periods, serving line reconfig needed. Impact on girls' and boys' restrooms.
2	FALLSVALE	1140	867	97	965	-175	558	172.9%	MP Room and kitchen impacted; equipment needed. Impact on girls' and boys' restrooms.
3	NORTH SHORE	510	392	112	507	-3	374	135.6%	MP Room would require increased lunch periods/kitchen more equipment. Enrollment will increase over historical maximums. Impact on girls' and boy's restrooms.
4	TOTAL CORE FACILITIES CAPACITY			319	2178	-222	1463	148.9%	
5									
6									
7	ADDITIONAL STUDENTS AND RESULTING ENROLLMENT == FROM CLOSURE SCENARIOS SPREADSHEETS								
8	* UNHOUSED STUDENTS = Resulting Enrollment minus Total Capacity. If the number is positive, additional classrooms are needed.								
9	If the number is negative, the school has adequate capacity to house the students.								
10	This summary sheet links back to Scenario Closures for Resulting Enrollment and Tables 16 and 17B for capacity information.								
11	CAPACITY AND ENROLLMENT ARE GENERAL EDUCATION ONLY. SPECIAL EDUCATION ANALYZED SEPARATELY.								
12	ASSUMED 30:1 RATIO								
13									
14	YEAR BUILT: 1957								
15	YEAR MODERNIZED: 2005								
16									
17	PERMANENT CLASSROOMS:		16	72.7%					
18	PORTABLE CLASSROOMS:		6	27.3%					
19	TOTAL CLASSROOMS:		22	100.0%					

Appendix B-5

Sample Worksheet of Voting Factors

Voting Factors -- SAMPLE ONLY -- BVUSD DCC WOULD VOTE ON WHICH FACTORS THEY WANTED TO INCLUDE.

Bear Valley Unified School District
 District Consolidation Committee
 Meeting # _____ (Date)

Directions:

These are the eleven factors that the DCC voted on at Meeting # _____.
 Start with the first one (the one that says "a or b") and go to the first square and ask yourself "is a or b more important to me?"
 Circle a or b.

Next, move on to the next square to the right, (the one that says "a or c"), going across each row, until you get to the end of that row, considering one factor against the other, and circling the one that is more important to you.
 Next, move to the next row down (the "B" row) and go across in the same manner.

Next, count the total number of letters and place it in that letter's row in the Total column.

For example, if you have 5 'a's circled, go across in the "A" row and type 5 into the Total column in the "A" row.
 The percentages should fill in and you can see what is your most important criteria, then your next most important, and so on.

In our scenario, the maximum any one letter can have is 10. If you've counted 11, something is wrong.
 Don't forget to count all the letters; it's not just that row, you may have circled that letter in previous rows (cannot be rows after that).
 It works. Try it and see.

If you use this as an Excel spreadsheet, the percentage column formula is already included, so if you input your totals into the "Total" column, you'll see your weighting.
 Once you've done that, print it and bring it to Meeting # _____. We'll vote on each square.

Bring this sheet with all your circles completed to Meeting # _____ on (date).

At the meeting, we will then take a vote on each square and circle the letter with the highest number of votes.

Next, we count the total number of each letter and place that number into the "Total" score.

There should be a total of 55 (that's the number of squares), and a total percent of 100%

Criteria	a	b	c	d	e	f	g	h	i	j	k	Total	%
a Estimated Cost Savings Per Student	A												
b Ability of Receiving Schools to Accommodate Students in Existing Core Facilities	B												
c Percentage of Permanent Classrooms	C												
d Enrollment General Education Only (October 2009)	D												
e 2009 Academic Performance Index (API) Score	E												
f Percent Gain 2004 to 2009 AYP - English/Language Arts	F												
g Percent Gain 2004 to 2009 AYP - Math	G												
h # of Students Living within One Mile of School (road mile)	H												
i # of Enrolled Students Living within One Mile of School (road mile)	I												
j % of Enrollment Living in Attendance Area													
k % of Students Living within One Mile of School (road mile)													
TOTAL	0												
%	0												

Sum should be 55.

Appendix C-1

Sample Voting Factors (after DCC vote)

Criteria Value Analysis - SAMPLE Voting Factors (after DCC vote)
 Bear Valley Unified School District
 District Consolidation Committee
 Meeting # _____ (date)

Criteria	18	8	24	3	17	10	21	6	22	5	22	5	19	8	19	8	17	10	19	8	TOTAL	%	
a	Vote Counts (a)																					10	20.4%
a	Estimated Cost Savings Per Student																						
b	Vote Counts (b)																						
b	Ability of Receiving Schools to Accommodate Students in Existing Core Facilities																						
c	Vote Counts (c)																						
c	Percentage of Permanent Classrooms																						
d	Vote Counts (d)																						
d	Enrollment General Education Only (October 2009)																						
e	Vote Counts (e)																						
e	2009 Academic Performance Index (API) Score																						
f	Vote Counts (f)																						
f	Percent Gain 2004 to 2009 AYP - English/Language Arts																						
g	Vote Counts (g)																						
g	Percent Gain 2004 to 2009 AYP - Math																						
h	Vote Counts (h)																						
h	# of Students Living within One Mile of School (road mile)																						
i	Vote Counts (i)																						
i	# of Enrolled Students Living within One Mile of School (road mile)																						
j	Vote Counts (j)																						
j	% of Enrollment Living in Attendance Area																						
k	Vote Counts (k)																						
k	% of Students Living within One Mile of School (road mile)																						

Appendix C-2

Sample Weighted Comparison Matrix

SAMPLE - DISTRICT CONSOLIDATION COMMITTEE WEIGHTED COMPARISON MATRIX
 BEAR VALLEY UNIFIED SCHOOL DISTRICT
 (DATE) Board Meeting

EVALUATIVE CRITERIA	WEIGHT OF IMPORTANCE	BALDWIN LANE		BIG BEAR		FALLSVALE		NORTH SHORE	
		RANK	SCORE	RANK	SCORE	RANK	SCORE	RANK	SCORE
Estimated Cost Savings Per Student	20.4%	1	20.4	3	61.2	2	40.8	2	40.8
Ability of Receiving Schools to Accommodate Students in Core Facilities	18.4%	3	55.2	2	36.8	1	18.4	1	18.4
Enrollment General Education Only (October 2009)	14.3%	1	14.3	3	42.9	2	28.6	2	28.6
API 2009 & AYP 2004 - 2009 ELA AND MATH	10.2%	2	20.4	2	20.4	1	10.2	1	10.2
Transportation/Proximity	36.6%	2	73.2	1	36.6	3	109.8	3	109.8
ANY OTHER FACTORS CHOSEN BY DCC ARE LISTED HERE									
TOTAL WEIGHTED COMPOSITE SCORE	99.9%		183.5		197.9		207.8		207.8

Appendix D

Sample Board Resolution on School Closures

BOARD OF EDUCATION
BEAR VALLEY UNIFIED SCHOOL DISTRICT
 Board Resolution on School Closures
RESOLUTION NO. XX-XXXX
 _____, 2011

Whereas the Bear Valley Unified School District (BVUSD) must address a structural deficit (spending in excess of revenue) and has adopted a budget that includes school closures for 2011-12 and 2012-13; and

Whereas the San Bernardino County Superintendent, as is required under state statute, approved the 2010-11 BVUSD budget contingent upon school closures and other specified remedies for the BVUSD structural deficit; and

Whereas on (insert date) the BVUSD Board approved the criteria, the process and the time line for school closures as well as authorizing a contract for expert review and recommendation on school closures; and

Whereas the District has held ___ public meetings to follow the process for school closures and involve the community in the process; and

Whereas District staff have used public input and expert review in formulating a recommendation for school closures for 2011-12 and 2012-13; and

(Use this paragraph if applicable) Whereas the (insert name of potential lessee) has expressed an interest (or made a commitment or signed a lease, but made no commitment) to keep one of the schools (XXXX Elementary) open for 2011-12 and 2012-13 (insert which specific entity will be leasing or purchasing or committing funds and the amount, if known, to keep the school open);

Therefore be it resolved that the BVUSD board adopts a closure plan as required by the county:

Schools/Facilities Closed for 2011-12:

(List school(s) here)

PASSED AND ADOPTED this ___ day of _____, 2011, at a special meeting of the Board of Education by the following votes:

AYES: NOES: ABSENT: ABSTAIN:

I HEREBY CERTIFY that the foregoing resolution was duly and regularly introduced, passed and adopted by the members of the Governing Board of the Bear Valley Unified School District at the public meeting of said board held on _____, 2011.

 XXXX

Secretary, Board of Education

Appendix E

Sample Alternative (Less Formal) School Closure Scoring Rubric

Evaluation of School Site and Buildings

The purpose of this form is to identify criteria to be considered in evaluating school sites and buildings relative to school closure. These factors include: age, condition, and adequacy of buildings, as well as adequacy of the site and topography.

School: _____

CRITERIA	POINTS AWARDED (Max = 5 pts for each category)
Age	
Condition	
Last Modernized	
Space	
Ongoing Maintenance Needs	
Site	
Total Points (Max = 30)	

AGE OF BUILDING(S)

- 0 to 10 years = 5 points
- 11 to 20 years = 4 points
- 21 to 30 years = 3 points
- 31 to 40 years = 2 points
- 41 to 50 years = 1 points
- 50+ years = 0 points

CONDITION OF SCHOOL BUILDING(S)	YES ----- SOMEWHAT ----- NO				
	5	4	3	2	1
Are the buildings in good repair (including roofs, painting, floor, etc.)?					
Are the buildings modern and up-to-date?					
Are the buildings Americans with Disabilities Act (ADA) compliant?					
Do the buildings provide a safe and healthful environment?					
Are the building and electrical lighting systems energy efficient?					

SPACE AND FUNCTIONALITY	YES ----- SOMEWHAT ----- NO				
	5	4	3	2	1
Is there adequate classroom space to accommodate various educational activities?					
Does the building permit flexibility and expansion?					
Is a high percentage of the enclosed space available for educational functions?					
Do the building scale and space relationships contribute to a functional, attractive school?					
Are various sizes of instructional space provided?					
Is adequate space available for library, cafeteria, multipurpose space, additional portables, etc.?					

ONGOING MAINTENANCE NEEDS	YES ----- SOMEWHAT ----- NO				
	5	4	3	2	1
The building's age and physical condition does not significantly increase its upkeep requirements.					
Are the exteriors and interiors of the buildings made of materials that require little or no maintenance?					
Are roofing, plumbing fixtures and hardware made of durable and long-life materials?					
Is the building constructed in such a way as to discourage vandalism?					
Is the playground equipment durable and functional, with a long life expectancy?					
Are the mechanical equipment, lighting fixtures, and stationary cabinets in good condition?					
Are the low-voltage and computer network systems modernized?					
Are the HVAC systems in good condition?					
Is the building energy efficient?					

SITE ADEQUACY	YES ----- SOMEWHAT ----- NO				
	5	4	3	2	1
Is the site size and shape adequate for present and future buildings, play fields, and landscaping areas?					
Are the grounds easy to maintain?					

Evaluation of Educational Factors

The purpose of this form is to evaluate educational factors relative to specific school closure scenarios. These factors include: curriculum, program benefits, and other educational considerations.

Based on Scenario #: _____

School Considered for Closure: _____

Receiving Schools: _____

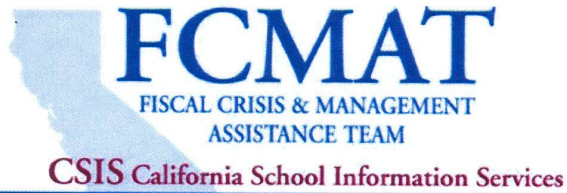
As a result of this school closure scenario:	Yes 2 pts	Somewhat 1 pts	No 0
Staff utilization is optimized			
High-risk students will receive support services and interventions at the receiving schools			
Special education programs can be absorbed or duplicated at receiving schools			
English language learners will be appropriately placed given their language needs			
Students will be relocated to a school performing at the same level or higher			
TOTALS:			

Total educational evaluation points for this scenario: _____

(Other evaluation sheets would be developed that include the other factors that the committee wishes to explore in this points-based method.)

Appendix F

Study Agreement



**FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
August 4, 2010**

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Bear Valley Unified School District, hereinafter referred to as the District, mutually agree as follows:

1. BASIS OF AGREEMENT

The Team provides a variety of services to school districts and county offices of education upon request. The District has requested that the Team provide for the assignment of professionals to study specific aspects of the Bear Valley Unified School District operations. These professionals may include staff of the Team, County Offices of Education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this Agreement.

In keeping with the provisions of AB1200, the County Superintendent will be notified of this agreement between the District and FCMAT and will receive a copy of the final report. The final report will be published on the FCMAT website.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

The scope and objectives of this study are to:

The Bear Valley Unified School District has determined there is a need to review the number of school facilities the district operates to address issues including declining enrollment, funding reductions, facility utilization, and program equity. The job of the superintendent and board members is to evaluate facts and remain independent of the school closure process. The process of aggregating the facts must be credible, transparent and non-political. The District will need to form a District Advisory Committee and the responsibilities of the DAC, often referred to as 7-11 Committee (due to legislative requirements of at least 7 but no more than 11 members) should be involved in the fact-finding process necessary for an informal recommendation about school closure. The formation of the DAC is in

accordance with Education Code Section 17389. In order to begin the process and analysis regarding school closures, the district has requested FCMAT's assistance to conduct the following:

1. Provide five year cohort enrollment analysis by district and school including birth rate analysis for kindergarten students.
2. Develop a scoring rubric and criteria to evaluate the school closure process and provide as the baseline document for the District Advisory Committee to begin the process. The scoring rubric and criteria shall include but not be limited to the following:
 - a) Cohort Enrollment Analysis
 - b) Board policies regarding school site size and student capacity
 - c) Facility Conditions Evaluation, review of Facilities Master Plan, General Obligation Bond or other funding from the Office of Public School Construction
 - d) Facility capacity by site utilizing OPSC loading standards or Board policies
 - e) Grade Level Configurations or realignment, impact to students
 - f) Location and geographic assessment by site
 - g) Academic Progress including Academic Performance Index (API) or Adequate Yearly Performance (AYP) indicators by site
 - h) Transportation options regarding closure for each site
 - i) Financial Analysis regarding cost savings
 - j) Special Programs or schools
 - k) Impact of collective bargaining
 - l) Facility alternatives including surplus sale
 - m) Charter School analysis
3. Provide recommendations regarding the formation of the 7-11 Committee and proposed time line for school closure. The time line and calendar will include the recommended scheduled presentations, sample board resolutions, and other recommended meetings and site visitations.
4. FCMAT will provide all the necessary documents and recommendations for the school closure process but will not participate as a member of the proposed 7-11 committee.

B. Services and Products to be Provided

- 1) Orientation Meeting - The Team will conduct an orientation session at the School District to brief District management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.
- 2) On-site Review - The Team will conduct an on-site review at the District

office and at school sites if necessary.

- 3) Exit Report - The Team will hold an exit meeting at the conclusion of the on-site review to inform the District of significant findings and recommendations to that point.
- 4) Exit Letter - The Team will issue an exit letter approximately 10 days after the exit meeting detailing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.
- 5) Draft Reports - Sufficient copies of a preliminary draft report will be delivered to the District administration for review and comment.
- 6) Final Report - Sufficient copies of the final study report will be delivered to the District administration following completion of the review.
- 7) Follow-Up Support – Six months after the completion of the study, FCMAT will return to the District, if requested, to confirm the District’s progress in implementing the recommendations included in the report, at no cost. Status of the recommendations will be documented to the District in a FCMAT Management Letter.

3. PROJECT PERSONNEL

The study team will be supervised by Anthony L. Bridges, Deputy Executive Officer, Fiscal Crisis and Management Assistance Team, Kern County Superintendent of Schools Office. The study team may also include:

- | | | |
|-----------|-----------------------------|--|
| A. | <i>Diane Branham</i> | <i>FCMAT Fiscal Intervention Specialist</i> |
| B. | <i>Eric D. Smith</i> | <i>FCMAT Consultant</i> |
| C. | <i>Leigh A. Coop</i> | <i>FCMAT Consultant</i> |

Other equally qualified consultants will be substituted in the event one of the above noted individuals is unable to participate in the study.

4. **PROJECT COSTS**

The cost for studies requested pursuant to E.C. 42127.8(d)(1) shall be:

- A. \$500.00 per day for each Team Member while on site, conducting fieldwork at other locations, preparing and presenting reports, or participating in meetings. Cost per day for outside consultants will be billed at the actual daily rate.
- B. All out-of-pocket expenses, including travel, meals, lodging, etc. The District will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon acceptance of the final report by the District.

Based on the elements noted in section 2 A, the total cost of the study is estimated at \$12,500.

- C. Any change to the scope will affect the estimate of total cost.

Payments for FCMAT services are payable to Kern County Superintendent of Schools - Administrative Agent.

5. **RESPONSIBILITIES OF THE DISTRICT**

- A. The District will provide office and conference room space while on-site reviews are in progress.
- B. The District will provide the following (if requested):
 - 1) A map of the local area
 - 2) Existing policies, regulations and prior reports addressing the study request
 - 3) Current organizational charts
 - 4) Current and four (4) prior year's audit reports
 - 5) Any documents requested on a supplemental listing
- C. The District Administration will review a preliminary draft copy of the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the Team prior to completion of the final report.

Pursuant to EC 45125.1(c), representatives of FCMAT will have limited contact with District pupils. The District shall take appropriate steps to comply with EC 45125.1(c).

6. **PROJECT SCHEDULE**

The following schedule outlines the planned completion dates for key study milestones:

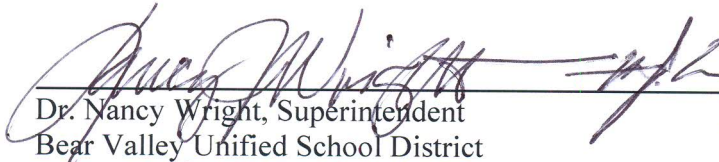
<i>Orientation:</i>	<i>Estimated August 16, 2010</i>
<i>Staff Interviews:</i>	<i>to be determined</i>
<i>Exit Interviews:</i>	<i>to be determined</i>
<i>Preliminary Report Submitted:</i>	<i>to be determined</i>
<i>Final Report Submitted:</i>	<i>to be determined</i>
<i>Board Presentation:</i>	<i>to be determined</i>
<i>Follow-Up Support:</i>	<i>If requested</i>


7. **CONTACT PERSON**

Name of contact person: Walter Con, Director of Business

Telephone: 909-866-4631 FAX: 909-866-2040

E-Mail: walter_con@bigbear.k12.ca.us

 8-5-10
 Dr. Nancy Wright, Superintendent Date
 Bear Valley Unified School District

 August 4, 2010
 Anthony L. Bridges, Deputy Executive Officer Date
 Fiscal Crisis and Management Assistance Team

