FCMAT

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM

Special Education Review

June 2, 2026

Val Verde Unified School District

Michael H. Fine
Chief Executive Officer

FCMAT FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM

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Gordon Amerson, Ed.D., Superintendent
Val Verde Unified School District
975 West Morgan St.
Perris, CA 92571

Dear Superintendent Amerson:

In December 2025, the Val Verde Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct a review of the district's special education program. The agreement stated that FCMAT would perform the following:

1. Review the district's implementation of student success teams, response to instruction and intervention, and multitiered system of supports, and make recommendations for improvement, if any.

2. Analyze special education teacher staffing ratios, class sizes and caseloads using statutory requirements for mandated services and statewide guidelines, and make recommendations for improvement, if any.

3. Review the efficiency of staffing allocations of special education paraeducators, per Education Code requirements and/or industry standards, and make recommendations for improvement, if any. Review the procedures for identifying the need for paraeducators, including considerations related to the least restrictive environment and the processes for monitoring the assignment of paraeducators and determining the need for continued support from year to year (including classroom and 1-to-1 paraeducators).

4. Analyze staffing and caseloads for related service providers, including but not limited to speech pathologists, psychologists, occupational/physical therapists, adapted physical education teachers and other staff who may be related service providers, and make recommendations for improvement, if any.

5. Determine whether the district overidentifies students for special education services compared to the statewide and countywide averages, and make recommendations for reducing overidentification, if needed.

6. Analyze whether the district provides a continuum of special education and related services for students in preschool through age 22, including their placement in the least restrictive environments, and make recommendations for improvement (which may include instructional models), if any.

7. Review the Special Education Department's organizational structure and staffing in the district's central office to determine whether its administration, clerical and administrative support, program specialists, teachers on special assignment and overall function are aligned with those of districts of comparable size and structure, and make recommendations for greater efficiencies, if any.

8. Review the district's nonpublic school and nonpublic agency placement processes, costs and placements, and make recommendations for improvements and cost efficiencies, if any.

9. Review the district's professional development/training program as it relates to special education, and make recommendations for improvement, if any.

10. Review the district's unrestricted general fund contribution to special education and make recommendations for greater efficiency, if any.

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

FCMAT appreciates the opportunity to serve the Val Verde Unified School District and extends its thanks to all the staff for their assistance during fieldwork.

Sincerely,

Michael H. Fine
Chief Executive Officer

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About FCMAT

Purpose and Services

FCMAT was created by the California Legislature to help California's transitional kindergarten through grade 14 (TK-14) local educational agencies (LEAs) avoid fiscal insolvency. Today, FCMAT helps LEAs identify, prevent and resolve financial, management, program, data, and oversight challenges; provides professional learning; produces and provides software, checklists, manuals and other tools; and offers other related school business and data services.

FCMAT may be asked to provide fiscal crisis or management assistance by a school district, charter school, community college, county superintendent of schools, the state superintendent of public instruction, or the Legislature.

When FCMAT is asked for help with management assistance or a fiscal crisis, FCMAT management and staff work closely with the requesting LEA to meet their needs. Often this means conducting a formal study using a FCMAT study team that coordinates with the LEA for on-site fieldwork to evaluate specified operational areas and subsequently produces a written report with findings and recommendations for improvement.

For more immediate needs in a specific area, FCMAT offers short-term technical assistance from a FCMAT staff member with the required expertise.

To help meet the need for qualified chief business officials (CBOs) in LEAs, FCMAT offers four different CBO training and mentoring programs that consist of 11 or 12 diverse two-day training sessions over the course of a full year.

For agencies with professional learning needs, FCMAT offers workshops on specific topics. Popular topics include associated student body operations, use of FCMAT's Projection-Pro online financial forecasting software, use of FCMAT's Local Control Funding Formula (LCFF) Calculator, and data reporting for the California Longitudinal Pupil Achievement Data System (CALPADS). FCMAT staff and management also frequently make presentations at various professional conferences.

The California School Information Services (CSIS) service of FCMAT helps the California Department of Education (CDE) operate CALPADS; helps LEAs learn about CALPADS, resolve data issues and meet reporting requirements; and provides LEAs with training and leadership in data management. CSIS also developed and continues to host and improve the Standardized Account Code Structure (SACS) web-based financial reporting system for all California LEAs, and provides ed-data.org, which gives educators, policymakers, the Legislature, parents and the public quick access to timely and comprehensive data about TK-12 education in California.

Since it was formed, FCMAT has provided LEAs with the types of help described above on more than 2,000 occasions.

FCMAT's administrative agent is the Kern County Superintendent of Schools. FCMAT is led by Michael H. Fine, Chief Executive Officer, and is funded by appropriations in the state budget and modest fees to requesting agencies.

Workshop schedules, manuals, presentation slide decks, Projection-Pro software, LCFF calculators, past reports, an online help desk, and many other resources are available for download or use at no charge on FCMAT's website.

History

FCMAT was created by Assembly Bill 1200 (Chapter 1213, Statutes of 1991) and Education Code 42127.8. Assembly Bill 107 (Chapter 282, Statutes of 1997) added Education Code 49080, which charged FCMAT with responsibility for CSIS and its statewide data management work, and Assembly Bill 1115 (Chapter 78, Statutes of 1999) codified CSIS' mission.

Assembly Bill 1200 created a statewide plan for county offices of education and school districts to work together locally to improve fiscal procedures and accountability standards. Assembly Bill 2756 (Chapter 52, Statutes of 2004) gave FCMAT specific responsibilities for districts that have received emergency state loans.

In January 2006, Senate Bill 430 (Chapter 357, Statutes of 2005) amended Education Code 42127.8, and Assembly Bill 1366 (Chapter 360, Statutes of 2005) amended Education Codes 42127.8 and 84041. These new laws expanded FCMAT's services to include charter schools and community colleges, respectively.

Assembly Bill 1840 (Chapter 426, Statutes of 2018) changed how fiscally insolvent districts are administered once an emergency appropriation has been made, shifting oversight responsibilities from the state to the local county superintendent to be more consistent with the principles of local control, and giving FCMAT new responsibilities associated with the process.

Introduction

Background

Located in Riverside County, the Val Verde Unified School District serves students in transitional kindergarten through grade 12 (TK-12) across 24 schools: one preschool, 12 elementary schools, four middle schools, four high schools, two virtual schools, and an adult school. According to DataQuest, 18,717 TK-12 students were enrolled in 2025-26.

The district is a member and the administrative unit (AU) of the Riverside County Special Education Local Plan Area (SELPA). The SELPA is responsible to ensure that a full range of special education programs and services are available to its students. In 2025-26, 14.92% of the district's students were identified as requiring special education (DataQuest).

In December 2025, the district and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct a review of the district's special education program.

Study and Report Guidelines

FCMAT visited the district on March 24 and 25, 2026, to conduct interviews with central office and school administrators, special education teachers, related service providers, special education paraeducators, and other staff. Following fieldwork, FCMAT reviewed and analyzed data and documents. This report is the result of those activities.

FCMAT's reports focus on systems and processes that may need improvement. Those that may be functioning well are generally not commented on in FCMAT's reports. In writing its reports, FCMAT uses the Associated Press Stylebook and its own short internal style guide, which emphasize plain language, capitalize relatively few terms, and strive for conciseness, clarity and simplicity.

FCMAT relies on publicly available, authoritative data sources and provides direct links to sources where appropriate; however, sources sometimes differ in the data they provide, or their data may be revised over time due to various factors. FCMAT always strives to use the most accurate data available at the time of reporting.

Study Team

The study team was composed of the following members:

Carolynne Beno, Ed.D.
FCMAT Chief Analyst

Colleen Patterson, MBA, CMA
FCMAT Consultant

Leonel Martínez
FCMAT Technical Writer

All team members reviewed the draft report to confirm accuracy and achieve consensus on the final recommendations.

Executive Summary

Identification for Special Education

According to DataQuest, the Val Verde Unified School District's overall enrollment has decreased, but special education enrollment has increased over the past five years. During this period, the share of transitional kindergarten through grade 12 (TK-12) students enrolled in special education increased by 3.08 percentage points. In 2025-26, 14.92% of TK-12 students were identified as requiring special education (DataQuest), a rate lower than that of Riverside County or the state. In 2025-26, English learners were overrepresented in the special education population compared to the overall student population. According to district California Longitudinal Pupil Achievement Data System (CALPADS) reports, the district's identification of students for special education under the disability category of autism increased by 257 students between 2019-20 and 2025-26, which is a 92.78% increase.

The district's identification of students for special education is influenced by many factors, including its implementation of student study teams (SSTs) and multitiered systems of support (MTSS), which is discussed further in the "Factors Influencing Special Education Identification" section of this report.

Special Education Staffing

Central Office

The district has 2.99 more full-time equivalent (FTE) administrator/program support positions and approximately the same number of administrative support positions facilitating the special education program compared to the surveyed school districts.

Resource Specialist Program Teachers

Districtwide, resource specialist program (RSP) staffing is 6.04 FTE above the level required to meet the Education Code (EC) 56362(c) caseload standard. However, students receiving RSP support are not evenly distributed into groups of 28 — the maximum caseload allowed by EC 56362(c) — across district schools, and the district is attempting to implement an inclusive model. Thus, having more staffing than is required to meet the EC 56362(c) standard may be necessary to meet student needs.

In addition, as described in the "Service Options in the Least Restrictive Environment" section of this report, the district did not meet two of the three indicators measuring school-age least restrictive environment (LRE) on its annual performance report. To address this, the district may need to increase resource specialist staffing beyond the 1-to-28 teacher-to-student ratio to ensure students have sufficient access to their LRE. In making this determination, the district needs to consider factors such as the specialized academic instruction (SAI) minutes specified in students' individual education programs (IEPs) and the percentage of time they spend in general education. The industry standard for SAI-based programs supporting students in their LRE is 20 to 24 students per special education teacher.

Learning Centers

In 2025-26, the learning center special education teacher staffing is 1.00 to 7.00 FTE less than the industry standard caseload range of 20 to 24 students per special education teacher.

Special Day Class Programs

In 2025-26, the districtwide special day class (SDC) teacher staffing was appropriate given the industry standard range for the following district school age programs: mild-to-moderate support needs SDC, extensive support needs SDC and autism SDC.

In 2025-26, the preschool SDC teacher staffing for the district's autism and extensive supports needs SDCs is appropriate given the size of these programs.

In 2025-26, the districtwide school age therapeutic SDC teacher staffing was 1.50 to 2.40 FTE higher than the industry standard range, and the preschool mild-to-moderate support needs SDC teacher staffing was 1.86 FTE higher than the industry standard range.

Special Education Instructional Assistants

In 2025-26, the districtwide instructional assistant staffing for its SDCs for students with extensive support needs and autism is higher than the industry standards. However, the district has just 39 instructional assistants who are assigned to provide 1-to-1 student support. While there is no established industry standard for special education instructional assistants providing 1-to-1 student support, in Val Verde Unified, 1.40% of the students in its special education program have a 1-to-1 instructional assistant. Of the last seven districts FCMAT studied, only one district had a percentage comparable to Val Verde Unified. The other six districts FCMAT studied had assigned an average of 4.32% of the students in their special education program a 1-to-1 instructional assistant.

Staff reported that Val Verde Unified uses extra classroom instructional assistant support to meet student needs instead of assigning a 1-to-1 instructional assistant whenever possible. This is a positive practice because even though a parent/guardian or staff member's request for a student to have 1-to-1 support may be well meaning, it can hinder the student's independence and outcomes as described in the "1-to-1 Student Support" section of this report. But this practice is one reason the district's instructional assistant staffing for its SDCs for students with extensive support needs and autism is higher than the industry standards.

Related Service Providers

In 2025-26, the district is staffed 1.00 FTE less than the industry standard range for credentialed school nurses. In addition, the district has approximately 2.00 FTE less than what is needed for speech and language pathologist (SLP) staffing to be below the maximum Education Code caseload size.

Unrestricted General Fund Contribution to Special Education

Since 2021-22, costs for salaries, benefits, nonpublic school (NPS) placements, and nonpublic agency (NPA) services have risen significantly, while special education income has not kept pace. In 2024-25, the district's adjusted unrestricted general fund contribution to special education was $38,685,165, or 62.4% of total special education costs. In 2025-26, the district's unrestricted general fund contribution is estimated to be 63.9% of adjusted special education costs.

Findings and Recommendations

Background and Context — Transforming Education to Improve Outcomes for Students with Disabilities

Over the past two decades, educational reform movements emphasizing accountability have highlighted achievement gaps among students based on factors such as race and ethnicity, family income, language ability, and disability. Although California has made some progress in reducing inequities in educational outcomes for these student groups, those with disabilities remain among the lowest-performing subgroups.

In 2013, California convened a statewide special education task force dedicated to ending the persistent poor outcomes for California's students with disabilities, including eligible infants, toddlers, preschoolers, and students up to age 22 in kindergarten through grade 12. The task force's purpose was to study the complex systems designed to serve students and provide recommendations to the State Board of Education, the Commission on Teacher Credentialing, and the California Department of Education (CDE).

The CDE's project summary for the Statewide Special Education Task Force stated:

> California's current policies, including funding, credentialing, and a range of service delivery options, tend to "bolt on" special education to general education. While there are certainly examples throughout the state of well-integrated models of supports, these are the exceptions rather the norm. Our prevailing model has made it acceptable, and in some instances seem desirable, to isolate special education as a unique and separate system that parallels general education.

The summary further explained that operating special education as a separate program contradicts current research, which shows:

> Inclusive practices, integrated systems, and coherence are essential to provide high-quality, cost-effective special education programs within (rather than apart from) a well-articulated system of education.

In March 2015, the Statewide Special Education Task Force published One System: Reforming Education to Serve All Students, Report of California's Statewide Task Force on Special Education, its report on the state of special education in California. This report identified seven distinct and interconnected areas of focus to improve outcomes for students with disabilities:

1. Early learning.
2. Evidence-based school and classroom practices.
3. Educator preparation and professional learning.
4. Assessment.
5. Accountability.
6. Family and student engagement.
7. Special education financing.

Among the areas of focus and many recommendations in the 2015 report on one system was the predominant theme that California's special education system would improve if one coherent system were designed in which general education and special education work together to meet the needs of all students. The report explained:

> In a coherent system of education, all children and students with disabilities are considered general education students first; and all educators, regardless of which students they are assigned to serve, have a collective responsibility to see that all children receive the education and the supports they need to maximize their development and potential, allowing them to participate meaningfully in the nation's economy and democracy.

The CDE's project summary also identified the need to transform the understanding of special education from the perception of it as:

> A place where students go to receive more or different services, to a viewpoint that includes special education services as one of many programs of support under the umbrella of general education.

In 2020, the CDE commissioned WestEd, a nonprofit dedicated to fostering "success for every learner," to analyze policy and systemic changes affecting students with disabilities since the 2015 report on one system. The 2021 WestEd report, California's Progress Toward Achieving One System: Reforming Education to Serve All Students, explained that the 2015 report on one system was intended to create momentum and discourse in California's efforts to reform special education. To evaluate these efforts, WestEd reviewed the seven focus areas outlined in the 2015 report on one system and provided additional recommendations in each area. WestEd concluded that "numerous improvements have been made to California's general and special education landscapes."

Guided by the insights from the 2015 report on one system and the 2021 WestEd report, local educational agencies (LEAs) should focus on achieving coherence, fostering inclusive practices, and integrating student support systems. This approach is essential for building a comprehensive educational system that promotes positive outcomes for all students. LEAs need to recognize that students receiving special education services are general education students first and operate with the understanding that special education is one of the many support programs within general education, not a place where students go to receive more or different services. These tenets will inform the analysis of the district's special education program and its staffing throughout this report.

District Alignment with the 2015 Report on One System

Consistent with the 2015 report on one system, the district's organization supports interdepartmental collaboration and communication. Staff described the district's culture as family oriented and the departments as well-integrated. One staff member explained that they think of the district as people with specific roles, not separate departments. Most staff reported that the district's central office collaboratively develops systems that are implemented across district schools. The camaraderie among district staff and shared purpose to support student success was evident during all staff interviews.

Congruent with the recommendations in the 2015 report on one system, the district is implementing a comprehensive multi-tiered systems of support (MTSS) Strategic Plan, which is designed to create positive learning environments and support high levels of learning for all students, including students with disabilities. The 2015 report on one system recommends educators use Universal Design for Learning (UDL) to design accessible and inclusive learning experiences for all students and accommodate diverse learners. The academic supports outlined in the district's MTSS include a focus on UDL. As described in the "District

Implementation of MTSS" section of this report, the district's MTSS supports students' access to their least restrictive environment. Staff indicated that the district's MTSS Strategic Plan is not a one-time initiative; instead, it is a system of academic, behavioral and social-emotional supports with associated processes that are continually revisited and refined. The district provides ongoing professional learning aligned with its MTSS Strategic Plan according to identified needs.

Recommendations

The district should:

1. Maintain its focus on continuous improvement to evaluate and refine its MTSS to facilitate positive outcomes for all students, including students with disabilities.
2. Continue to provide professional learning and support for educators addressing how to use UDL to design instruction and learning activities that engage, challenge and support all students, including students with disabilities.

Identification for Special Education

Before examining the district's special education staffing, it is critical to consider the population the program serves: the students receiving special education services. This section provides an overview of data and trends related to the district's special education enrollment.

District Enrollment

Between 2020-21 and 2025-26, the district's TK-12 census day (official count of enrolled students on the first Wednesday in October) enrollment decreased by 586 students, as shown in Figure 1 below.

Figure 1. Census Day Enrollment of District Students in Grades TK-12, 2020-21 – 2025-26

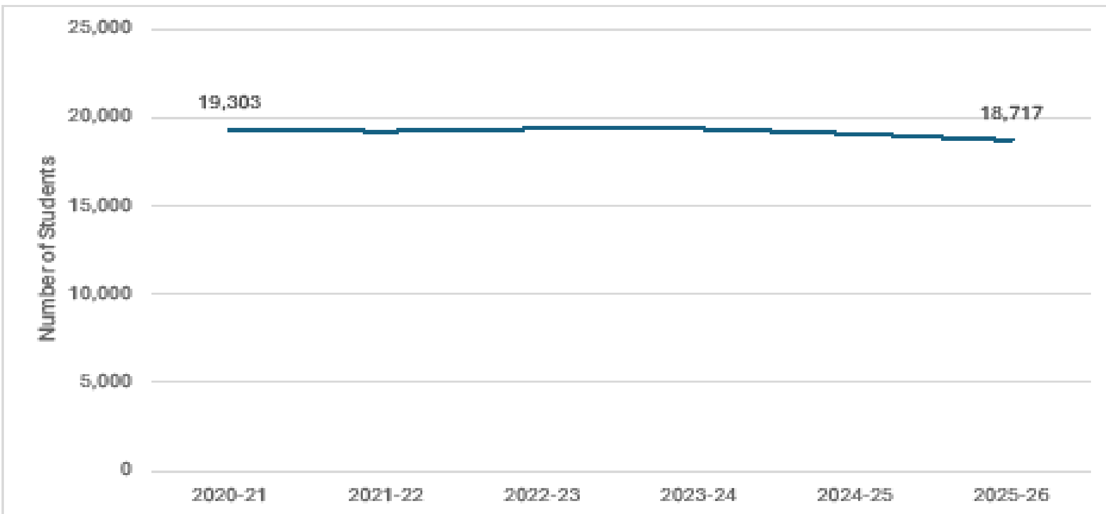


Figure 1. A graph showing that district TK-12 census day enrollment decreased by 586 students, from 19,303 students in 2020-21 to 18,717 students in 2025-26.

Source: Enrollment Multi-Year Summary for Charter and Non-Charter Schools -Val Verde Unified School District (CDE).

Between 2020-21 and 2025-26, the district's census day TK-12 special education enrollment increased by 510 students, as shown in Figure 2 below.

Figure 2. District Special Education Enrollment in Grades TK-12, 2020-21 – 2025-26

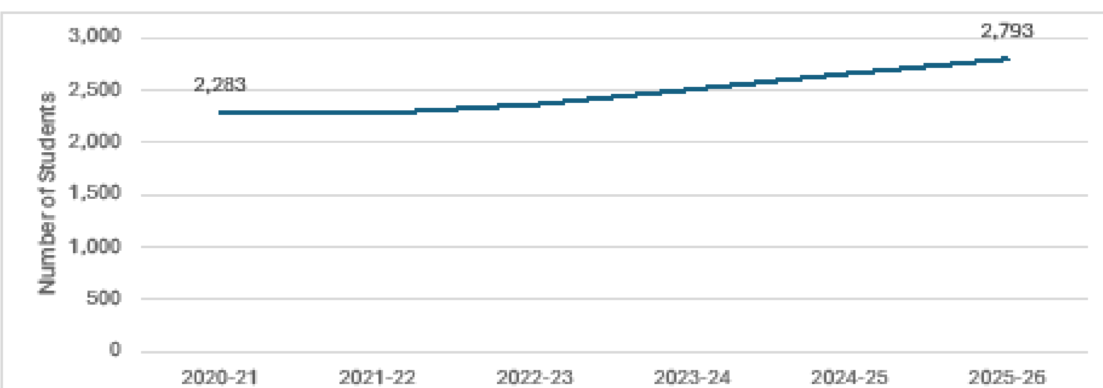


Figure 2. A graph showing that district TK-12 special education enrollment increased by 510 students, from 2,283 students in 2020-21 to 2,793 students in 2025-26.

Source: Enrollment Multi-Year Summary for Charter and Non-Charter Schools - Val Verde Unified School District (CDE).

In 2025-26, district students who identify as male are more likely to be identified for special education than those who identify as female. Although they represent 52% of all students, they account for 66.6% of students in special education, which mirrors the 2025-26 statewide average calculated from DataQuest. By contrast, students who identify as female make up 48% of all students but only 33.4% of those in special education.

This disproportionate representation of males is influenced by factors such as referral bias – for example, students who identify as male are more often referred because of poor grades or behavior support needs – and differences in how teachers perceive behavior, because students who identify as male are more likely to draw negative attention in school. Consequently, it is important for LEAs to analyze special education referral rates by gender identification and provide professional learning as needed to help address any disparities.

District Special Education Enrollment by Disability Category

The Individuals with Disabilities Education Act (IDEA) defines 14 categories of disability under which a student may be eligible for special education. In 2025-26, approximately 90% of the district's students enrolled in special education qualified under one of the four categories listed in Table 1 below.

Table 1. Percentage of District Special Education Enrollment by Primary Disability Category, 2019-20 and 2025-26

	Autism	Other Health Impairments	Specific Learning Disability	Speech and Language Impairment
2019-20	9.35%	11.65%	46.46%	15.36%
2025-26	18.58%	12.84%	42.97%	15.94%
Percentage Point Difference	**9.23**	**1.19**	**-3.49**	**0.58**

Source: CALPADS report 16.1 for 2019-20 and CALPADS report 16.12 for 2025-26.

Note: Although IDEA defines 14 disability categories for special education eligibility, this table shows data only for the four most common in the district.

From 2019-20 through 2025-26, the number of district students qualifying for special education under the disability category of autism increased from 277 to 534 – an increase of 92.78%, according to district CALPADS reports. This increase in the district's identification rate for special education under the category of autism in 2025-26 aligns with the statewide trend.

Disproportionality in Special Education Identification

The National Association of School Psychologists defines special education disproportionality as "the extent to which membership in a given group affects the probability of being placed in a specific disability category." In simpler terms, it refers to the over- or underidentification of certain student groups — such as English learners, students who identify as male, or students from specific racial or ethnic backgrounds — for special education.

Racial and Ethnic Balance of Students

In 2025-26, most of the district's students identified as Hispanic, African American or White and their representation as a percentage of total students enrolled in special education approximated their representation as a percentage of all district students. Table 2 compares the student groups (students who identify as

African American, Hispanic or Latino, and White) that together accounted for approximately 96% of district enrollment.

Table 2. Percentage of Students in Special Education, by Race and Ethnicity, Compared to Percentage of Total Student Population, 2025-26

	African American	Hispanic or Latino	White
Percentage of Total Enrollment	10.36%	80.64%	3.23%
Percentage of Special Education Enrollment	13.61%	77.19%	4.87%
Difference	**3.25**	**3.45**	**1.64**

Source: Enrollment by Ethnicity in 2025-26 - Val Verde Unified School District (CDE).

Students Who Identify as African American

In 2023-24, the district had an overrepresentation of students who are African American in special education under the disability category of emotional disturbance (now called emotional disability following legislative action). As a result, the district was required to develop and implement a Compliance and Improvement Monitoring for Comprehensive Coordinated Early Intervening Services Action Plan (CIM for CCEIS Action Plan). The purpose of this plan is to identify and address any factors that contribute to disproportionality.

The district performed a root cause analysis to develop its CIM for CCEIS Action Plan and found a need for increased tiered behavioral supports, particularly at the Tier 3 level. To increase the availability and intensity of behavioral interventions, the district developed a school psychologist internship and practicum program that was modeled after the district's therapist intern program. The school psychologist interns assist with the foundational elements of psychoeducational assessments, completing tasks such as student record reviews, observations and data collection. This allows other school psychologists to focus on classroomwide prevention and targeted early childhood support at the elementary schools by providing small group treatment and 1-on-1 support for students with behavioral or social challenges. At the secondary schools, school psychologists provide social-emotional support focused on group dynamics and specialized counseling to support adolescent development. The district's school psychologist internship and practicum program was piloted in 2024-25 and is being implemented in 2025-26. At the time of FCMAT's study, in 2025-26, 1,700 contacts have been made with students in need of social emotional and/or behavioral support. The district's innovative school psychologist internship and practicum program supports student needs, addresses a root cause that led to the overrepresentation of students who are African American in special education under the disability category of emotional disturbance, and is a training ground for future school psychologists.

English Learners in Special Education

According to DataQuest, in 2025-26, English learners (ELs) represented 19.13% of all district TK-12 students and 29.14% of students in special education. English learners are commonly overidentified for special education services, and this may be the case in the district.

WestEd's brief, Resources and Strategies for Identifying and Supporting English Learners with Learning Disabilities, identified two main factors that can lead to inconsistent identification of EL students with learning disabilities:

- A lack of understanding about why EL students are not making adequate progress.

- Poorly designed and implemented referral processes.

The cause of the district's higher-than-expected identification of English learners for special education is not known. Therefore, the district may benefit from using the WestEd brief as a guide to investigate its higher-than-expected identification of English learners in special education and provide professional learning as necessary.

District Special Education Enrollment Compared to Countywide and Statewide Enrollment

According to DataQuest, over a five-year period the percentage of district TK-12 students enrolled in special education increased by 3.08 percentage points, from 11.84% in 2020-21 to 14.92% in 2025-26.

FCMAT compared the district's total noncharter TK-12 enrollment and special education enrollment in 2025-26 with noncharter countywide and statewide TK-12 figures, as shown in Table 3 below.

Table 3. Comparison of Noncharter School TK-12 Total and Special Education Enrollment, 2025-26

	Val Verde	Riverside County	California
Grades TK-12 Total Noncharter School Enrollment	18,717	381,626	5,005,614
Grades TK-12 Special Education Noncharter School Enrollment	2,793	61,059	753,136
Percentage	14.92%	16.00%	15.05%

Sources: Enrollment - Val Verde Unified School District (CDE), Non-Charter School Enrollment for Grades TK-12 - Riverside County (CDE), and Non-Charter School Enrollment for Grades TK-12 - State (CDE).

The district identified a lower percentage of TK-12 students as requiring special education than both Riverside County and the state. However, since the percentage of district students identified as requiring special education grew by 3.09 percentage points between 2020-21 and 2025-26, the district needs to investigate the reasons for this. Possible reasons for the district's higher identification rates are discussed in the "Factors Influencing Special Education Identification" section of this report.

Recommendations

The district should:

1. Annually monitor the percentage of students who qualify for special education and assess the proportionality of the special education population compared with overall enrollment, analyzed at least by gender, race, ethnicity, and English learner status. Provide training on proper identification practices as necessary.
2. Continue to implement its CIM for CCEIS Action Plan to reduce its overrepresentation of African American students identified for special education under the disability category of emotional disturbance.
3. Use WestEd's brief Resources and Strategies for Identifying and Supporting English Learners with Learning Disabilities as a guide to investigate its higher-than-expected identification of ELs in special education and provide targeted professional learning as necessary.

Factors Influencing Special Education Identification

Education Code (EC) 56303 states, “A pupil shall be referred for special educational instruction and services only after the resources of the regular education program have been considered and, where appropriate, utilized.” Identifying a student for special education before implementing general education interventions does not best serve the student. Students in special education can experience stigma, less access to the rigorous instruction given in the general education curriculum, limited interaction with their peers without disabilities, and lower expectations, which can limit their progress and outcomes. In addition, serving a student in special education through an IEP is costlier than serving one through interventions and general education supports.

As mentioned in the “District Special Education Enrollment Compared to Countywide and Statewide Enrollment” section of this report, from 2020-21 through 2025-26, the percentage of district students in grades TK-12 enrolled in special education increased by 3.08 percentage points. The district’s special education identification rate approximates the state average for noncharter schools but is about 1.00 percentage point below the county average for noncharter schools. The district’s increasing special education identification rate is influenced by its SST process and the MTSS, as outlined below.

Student Success Team Process

Before considering a special education assessment, students with learning differences and/or behavioral or social-emotional needs should be referred to an SST. This school-based team approach is designed to help students with a wide range of concerns related to their school performance and experience. SSTs are responsible for reviewing students’ strengths and weaknesses, identifying appropriate interventions, setting specific, measurable, achievable, relevant, and time-based (SMART) goals, and monitoring students’ progress toward these goals. An SST is composed of the student (if appropriate), the parent or guardian, and various school personnel such as counselors, resource specialists, speech pathologists, school psychologists, classroom teachers, and administrators. All LEAs should have an SST process.

The district has a districtwide SST process called the educational monitoring team (EMT) and uses common forms to document the reason for a referral, teacher observations, and a student’s educational history, learning profile, goals, and the targeted instructional intervention plan(s) and monitoring. Staff interviewed consistently reported that the district culture is to fully utilize its MTSS to maximize student support services in general education, as opposed to rushing to a special education assessment. However, many staff indicated there are differences in the implementation and effectiveness of the EMT process across district schools.

Multitiered System of Support

California’s MTSS focuses on aligning various initiatives, supports, and resources with content standards to meet the needs of all students. This integrated, comprehensive framework aligns academic, behavioral, and social-emotional learning and implements continual improvement processes throughout the educational system. It serves as a method of organization and uses data collected through universal screening to support decision-making and problem-solving. MTSS includes both response to instruction and intervention (RtI^2) and positive behavioral interventions and supports (PBIS).

Response to Instruction and Intervention

Response to instruction and intervention (RtI^2) is a nationwide approach targeting individual students who are struggling academically. This approach mobilizes resources from the district, school and/or community to promote student success. It is data-driven and systematic, with tiered levels of intervention. The CDE coined the acronym RtI^2 to indicate a general education approach of high-quality, culturally responsive differentiated instruction and early intervention, prevention, and behavioral strategies. RtI^2 uses universal screening and data analysis of all students' learning progress in the general education classroom.

A comprehensive districtwide RtI^2 system not only prevents the inappropriate identification of students for special education but also ensures the delivery of services within students' LREs. An RtI^2 system should define the following for tiers 1 and 2:

- Type of intervention (e.g., literacy, mathematics, positive behavior supports).
- Who is selected for the intervention.
- Program, materials, and/or curriculum to be used.
- When students will receive instruction.
- Who will deliver the intervention.
- How students will be grouped.
- Time (i.e., duration and frequency).
- Assessments to be used (e.g., for progress monitoring and entry or exit from the support).

Positive Behavioral Interventions and Supports

Positive behavioral interventions and supports (PBIS) concentrates on fostering the emotional and behavioral learning of students, which leads to an increase in engagement and a decrease in problematic behavior over time. PBIS helps districts adopt and structure evidence-based behavioral interventions.

District Implementation of MTSS

The district is implementing a comprehensive MTSS Strategic Plan structured to focus on instruction and intervention, collaborative problem solving, data assessment, educational partner engagement, and implementation of evidence-based practices (methods, strategies, or interventions proven effective through rigorous research). The district's MTSS Strategic Plan includes three clearly defined tiers of support addressing:

- **Academics** – Academic supports focus on:
  - Students reading by third grade. The district is implementing supports such as reading interventions in kindergarten through grade two, reading tutors, and students regrouped to receive targeted support.
  - Universal Design for Learning (UDL), which is a framework assisting educators in designing accessible and inclusive learning experiences for all students and accommodating diverse learners.

  - Advancement Via Individual Determination (AVID), which is a program designed to instill academic, social and organizational skills in students, fostering a pathway to college and career readiness.
  - Student success in Science, Technology, Engineering, Arts, and Mathematics (STEAM).
  - English language supports, which are strategies and resources to help bilingual students succeed academically and socially.
- **Culture and Climate** – Culture and climate supports focus on:
  - Positive Behavior Intervention Systems (PBIS), which is a framework promoting positive behavior and social-emotional growth through a tiered support system.
  - Mental wellness (social-emotional learning and mental health). The district implements instructional practices and activities that teach cognitive skills and coping strategies that support staff and student wellness.
  - Restorative practices, which develop community in classrooms and at schools, and help students manage conflict and tensions by repairing harm and restoring relationships.
  - Child welfare and attendance services that cover compliance with education laws, student admission and enrollment procedures, student discipline procedures, transfers to alternative programs, and school climate and safety.

The district follows a continuous improvement process to analyze data to evaluate the effectiveness of certain interventions. For example, the district provided an individual treatment outcome report to evaluate its Tier 3 psychological services provided by its school psychologists. The report analyzed the progress students were making toward their therapeutic goals and was disaggregated by grade level, race/ethnicity, gender, and special group status (homeless, foster, special education program, 504 plan status). The report included trends, a summary of the impact, and possible future actions to strengthen outcomes.

Staff reported that the district's MTSS Strategic Plan and associated processes are periodically revisited and refined. The district provides ongoing professional learning aligned with its MTSS Strategic Plan according to identified needs. Overall, the district's MTSS is structured to prevent the unnecessary identification of students for special education services by providing robust opportunities for support and intervention to address a student's academic, behavioral, and social-emotional needs in the general education program.

Staff identified one area for growth in the district's MTSS: how the system supports students at school level transition points (elementary to middle school and middle to high school). Staff reported that they perceive an increase in referrals for special education assessments preceding and following these school transitions. Accordingly, the 2020 Policy Analysis for California Education (PACE) brief, Students with Disabilities in the CORE Districts, used data from the CORE districts (Fresno, Garden Grove, Long Beach, Los Angeles, Oakland, Sacramento, San Francisco, and Santa Ana) and noted how students in these LEAs entered and exited special education and transitioned between special education disability categories. This PACE brief reported that the highest entry rates into special education occur between kindergarten and fourth grade, and there is an overall downward trend in special education entry rates from second through 12th grades. However, PACE found that "… the percentage of students entering special education were found to slightly increase at key transition points: (a) after the elementary to middle school and middle to high school transitions and (b) in 12th grade, when students are preparing to matriculate into postsecondary opportunities."

Staff in Val Verde Unified did not provide data documenting this, but many staff reported this occurs because they are concerned a student may not be able to meet the increased academic or executive function demands at the different school level without the support of the special education program. According to the Cleveland Clinic, "Executive functions are mental processes that we use every day to solve problems, make plans and manage emotions." Staff explained that the elementary schools provide a list of students who are receiving RtI^2 support for the middle schools. However, staff reported that elementary schools monitor and record interventions differently because the documentation of these interventions has not been systematized. Consistent documentation of the RtI^2 process, including how long the student has been in RtI^2, would help the receiving school understand how to meet the needs of a new student who was receiving targeted (Tier 2) or intensive (Tier 3) interventions at their previous school.

Recommendations

The district should:

1. Assess whether additional standardization, guidance, and monitoring of its EMT process may be needed.
2. Continue to use a continuous improvement process to evaluate the effectiveness of its MTSS as a whole and of the supports and interventions offered.
3. Continue to provide ongoing professional learning aligned with its MTSS Strategic Plan according to identified needs.
4. Develop consistent record keeping procedures for students in the RtI process and ensure this information follows students transitioning between schools.
5. Determine whether there is a need for additional supports for students transitioning between school levels.

Service Options in the Least Restrictive Environment

The IDEA establishes nationwide minimum standards for providing education services to children with disabilities, as well as related services for eligible infants, toddlers, preschoolers, children, and youth with disabilities up to the age of 22. It mandates that each state ensure the availability of a free appropriate public education (FAPE) for any child with a disability who needs special education and related services, regardless of whether they have failed or been retained in a course or grade, and even if they are advancing from one grade level to another (Title 34, Section 300.101(c) of the Code of Federal Regulations (34 CFR 300.101(c))).

The IDEA also requires that students with disabilities be educated in the LRE. To determine the appropriate setting for an individual student, the IEP team reviews the student's strengths and needs and considers the educational benefit of placement in different educational settings. The CDE assesses LRE placement, and the results are published in indicators 5 and 6 of its Local Level Annual Performance Report. These reports, which are required by the IDEA, evaluate districts on 14 indicators for which the target is deemed to be either met or not met.

Preschool Least Restrictive Environment

In 2023-24 (the most recent report), the district's Local Level Annual Performance Report indicated it met one of the three targets for indicator 6, which assesses the placement of preschool students in the LRE, expressed as a percentage of the total number of preschool students who receive special education services, as shown in Table 4 below.

Table 4. District's 2023-24 Performance on Indicator 6 – Preschool Students in the LRE According to the Local Level Annual Performance Report

Item	Indicator	Rate	Target	Target Met?
6a	Preschool LRE: Regular Program	24.05%	≥45.00%	No
6b	Preschool LRE: Separate Class	63.29%	<27.00%	No
6c	Preschool LRE: Home	1.27%	<3.50%	Yes

Source: Local Level Annual Performance Report 2023-24 (CDE) (most recent report).

In an inclusive preschool system, students with disabilities are included in classrooms alongside students without disabilities, and the teacher(s) in these classrooms support the development of all students. Researchers such as Strain and Bovey (2011) and Phillips and Meloy (2012) have found that preschool age students with disabilities in inclusive learning environments gain more developmental benefits on intellectual, early literacy, and language measures than students with disabilities in segregated learning environments. Furthermore, the CDE states, "High-quality inclusion in early education supports children's development, relationships with peers, and a sense of belonging."

The district's Local Level Annual Performance Report indicates it needs to develop a more inclusive preschool system and increase the percentage of preschool students it serves in the regular program and decrease the percentage served in separate classes. Staff reported that most of the district's preschool age students with disabilities are educated in separate special day classes (SDCs). However, the district has been working on increasing the amount of time students in these classes have access to general education through collaboration with the state preschool program, which is located on a school campus with the district's preschool SDCs. As a result, students enrolled in preschool SDCs have daily inclusion time with their typically developing peers for recess and lunch. In addition, in 2025-26, two of the seven special education teachers are co-teaching for part of the school day with a state preschool teacher to facilitate mainstreaming of students with disabilities in state preschool classes.

The district's current preschool service options for students with disabilities do not provide enough students with access to their LRE. Given that, and because an inclusive preschool program provides a foundation for successful inclusion of students with disabilities in the school-age years, the district needs to expand its inclusive preschool opportunities. One barrier staff identified is that certain preschool teachers do not understand the benefits of preschool inclusion and/or need additional professional learning addressing inclusive practices. Accordingly, the district has begun providing professional learning to address this. The district may also benefit from exploring the resources available through Supporting Innovative Practices (SIP). SIP provides technical assistance in a three-tier system, within California's Statewide System of Support, to educational communities in their pursuit of inclusive and equitable systems.

School-Age Least Restrictive Environment

In 2023-24 (most recent report), the district's Local Level Annual Performance Report indicated it met one of the three targets for indicator 5, which assesses the placement of school-age students in the LRE, expressed as a percentage of the total number of school-age students who receive special education services, as shown in Table 5 below.

Table 5. District's 2023-24 Performance on Indicator 5 – School-Age Students in the LRE According to the Local Level Annual Performance Report

Item	Indicator	Rate	Target	Target Met?
5a	LRE Rate: In Regular Class More than 80%	57.68%	≥64.00%	No
5b	LRE Rate: In Regular Class Less than 40%	19.92%	<15.00%	No
5c	LRE Rate: Separate Schools	1.88%	<2.80%	Yes

Source: Local Level Annual Performance Report 2023-24 (CDE) (most recent report).

The district offers a full continuum of special education options and services for school-age students. However, the district's most recent Local Level Annual Performance Report indicates it needs to increase the percentage of school-age students it serves in the general education program and decrease the percentage of those served in separate classes. Access to general education settings and fostering interactions with neurotypical peers are essential for maximizing the performance and outcomes of students with disabilities. Therefore, the district needs to continue to prioritize the LRE and support its continuum of service options that facilitate access to general education settings for students.

Recommendations

The district should:

1. Monitor what percentage of the school day preschool and school-age students with IEPs spend in general education settings, with a focus on meeting or exceeding LRE targets in its Local Level Annual Performance Report.

2. Develop a more inclusive system to educate preschool students with disabilities to increase the percentage of preschool students it serves in the regular program and decrease the

percentage served in separate classes. Consider using the resources available through Supporting Innovative Practices (SIP).

3. Continue to provide professional learning for preschool teachers addressing inclusive practices.

4. Increase the number of school-age students with disabilities educated in general education settings for more than 80% of the school day, and decrease the percentage served in separate classes.

District Organization and Central Office Special Education Staffing

District Organization

A school district's organizational structure is crucial to the effectiveness of its special education program. An optimal structure fosters effective communication and collaboration across departments within the district's central office and schools. This collaboration is essential to meet the unique needs of students with disabilities and implement evidence-based practices that support inclusive education.

Special Education Program Support Staffing

Administrator/Program Support Positions

The Special Education Department has 14.00 FTE administrator/program support positions supporting its preschool and school-age special education programs, as shown in Table 6 below.

Table 6. Administrator/Program Support Positions Supporting Special Education in 2025-26

Position Title	Number of Positions	Total FTE
Director	1	1.00
Coordinator	1	1.00
Program Specialist	5	5.00
Teacher on Special Assignment (TOSA)	7	4.50
Total	**14**	**11.50**

Source: District-provided data.

Note: Positions listed in this table do not provide direct service to students.

1.00 FTE of the TOSA positions does preschool assessments so it was not included in this analysis. In addition, 0.25 FTE of each of the other TOSA positions were excluded from this analysis because they provide direct services to students (assistive technology support and case management support for teachers who are on leave).

Central Office Administrative Support Positions

The Special Education Department has 7.50 FTE administrative support staff, as shown in Table 7 below.

Table 7. Administrative Support Staff Positions Supporting Special Education in 2025-26

Position Title	Number of Positions	Total FTE
Secretary IV	1	1.00
IT Data Specialist State Reporting Special Education	1	1.00
Clerk Typist III	2	1.50
Secretary II	1	1.00
Special Education Bilingual Clerk	3	3.00
Total	**8**	**7.50**

Source: District-provided data.

Note: One of the clerk typist III positions supports general education mental health for 0.50 FTE, so that FTE was not included.

Special Education Staffing Comparison

FCMAT conducted an informal survey of unified school districts in California with student enrollment and unduplicated pupil percentages (UPP) similar to those of the Val Verde Unified School District.[1] The survey aimed to collect information on central office staffing within the school districts' special education departments:

- **Central Office Administrator/Program Support Positions –** Roles such as directors, assistant directors, coordinators, program specialists, and teachers on special assignment (TOSAs). These positions do not require an administrative credential.
- **Central Office Administrative Support Positions –** Roles such as secretaries, administrative assistants, filing clerks, and data technicians.

Table 8 below compares the Val Verde Unified Special Education Department central office staffing with data from the 11 unified school districts that participated in FCMAT's survey. On average, these school districts have 8.51 FTE administrator/program support positions supporting special education in the central office, while Val Verde Unified School District reports a higher level of staffing of 11.50 FTE. For special education administrative support positions in the central office, the comparison school districts average 7.20 FTE, and Val Verde Unified School District reports approximately the same level of staffing of 7.50 FTE.

Table 8. Administrator and Administrative Support Position Staffing Comparison

District	County	2024-25 Census Day Enrollment	2024-25 Census Day UPP%	2025-26 Administrator/ Program Support Position FTE	2025-26 Administrative Support Position FTE
ABC Unified	Los Angeles	17,612	61.52%	5.00	6.00
Alvord Unified	Riverside	16,466	86.51%	7.00	7.00
Antioch Unified	Contra Costa	16,199	82.16%	10.00	4.00
Beaumont Unified	Riverside	19,503	59.97%	8.00	4.00
Coachella Valley Unified	Riverside	16,052	94.34%	9.00	16.00
Colton Joint Unified	San Bernardino	18,414	86.99%	9.00	4.00
Compton Unified	Los Angeles	19,430	91.74%	6.00	6.00
Fairfield-Suisun Unified	Solano	20,359	67.51%	11.00	11.50
Hayward Unified	Alameda	19,954	80.70%	8.00	6.00
Montebello Unified	Los Angeles	19,195	89.47%	9.00	9.00

1 The term UPP refers to the percentage of students who are English learners, foster youth, or eligible for free or reduced-price meals. Each student is counted only once, regardless of how many categories they qualify for.

District	County	2024-25 Census Day Enrollment	2024-25 Census Day UPP%	2025-26 Administrator/ Program Support Position FTE	2025-26 Administrative Support Position FTE
Pajaro Valley Unified	Santa Cruz	17,089	81.55%	11.65	5.75
Average FTE				**8.51**	**7.20**
Val Verde Unified School District	Riverside	19,080	88.60%	11.50	7.50

Sources: Comparisons (Ed-Data) and FCMAT survey results.

Notes: Val Verde Unified School District was excluded from the average FTE calculations.

Teachers on special assignment were included in administrator/program support FTE if they are permanent positions and perform special education program support functions in the central office.

Any variances in a school district's actual FTE are due to FCMAT's interpretation of the survey data.

In 2025-26, Val Verde Unified has 2.99 FTE more administrator/program support positions and 0.30 FTE more administrative support positions facilitating the special education program compared to the surveyed school districts. Staffing should align with program complexity, compliance requirements, and student enrollment trends. Higher staffing levels in Val Verde Unified may be needed to support the more complex student programs it operates compared to what is typically observed across the state. Most districts send a larger percentage of their students with extensive support needs to regional programs and NPSs; Val Verde Unified does not and supports a higher percentage of these students in district programs. In addition, Val Verde Unified has invested in additional leadership positions to provide new special education teachers with instructional support and assistance writing and holding IEPs to promote student receipt of a procedural and substantive FAPE. This may improve services for students and decrease the number of due process filings. However, if staffing exceeds program needs, resources may be diverted from direct student services.

Recommendation

The district should:

1. Annually monitor special education enrollment and program support needs to determine whether changes in the current number of administrator/program support and administrative support positions in the Special Education Department are needed.

Special Education Teacher Staffing

FCMAT compared the district's special education teacher staffing to statewide guidelines and/or industry standards.

Resource Specialist Program Teachers

The RSP provides targeted instructional support and services to students with special education needs. RSP teachers play a critical role in managing caseloads, developing IEPs, and collaborating with general education teachers to support student success.

Education Code 56362(c) states:

> Caseloads for resource specialists shall be stated in the local policies developed pursuant to Section 56195.8 and in accordance with regulations established by the board. A resource specialist shall not have a caseload that exceeds 28 pupils.

The contract between the district and the teachers' association states, "Resource Specialist Program (RSP): Class size in a separate setting (i.e. Learning Strategies; does not include general education collaboration setting) should not exceed twenty-eight (28) students. No resource specialist unit member (including unit members in an elementary Learning Center model) shall have a caseload which exceeds twenty-eight (28) students."

In 2025-26, the district has 35.00 FTE RSP teachers. Based on caseload estimates provided by the district, these teachers manage the cases of 811 students, averaging 23.17 students per teacher, as shown in Table 9 below.

Table 9. Resource Specialist Program Teacher Staffing, 2025-26

Total Teacher FTE	Total Student Caseload	Average Teacher Caseload	Education Code Maximum	Staffing Needed to Meet Standard	Staffing Above (+) or Below (-) Standard
35.00	811	23.17	28 students per teacher	28.96 FTE	+ 6.04 FTE

Sources: District-provided data and EC 56362(c).

In 2025-26, the districtwide resource specialist staffing is 6.04 FTE more than what is required to meet the EC 56362(c) caseload standard. Since the students who receive support from a resource specialist are not neatly distributed into groups of 28 across district schools, having more staffing than is required to meet the EC 56362(c) standard may be necessary. In addition, the standard outlined in EC 56362(c) is based on a maximum caseload, which is higher than the statewide caseload average observed in LEAs that serve students using an inclusive model.

Although the definition of an inclusive model varies across California's school districts, the intent of such a model is to enable students to attend their neighborhood schools, progress through the grade levels that match their chronological ages, and access general education classes and curricula to the greatest extent possible. As described in the "Service Options in the Least Restrictive Environment" section of this report, the district did not meet two of the three indicators that measure school age LRE on its annual performance report. Accordingly, increasing resource specialist staffing to exceed the 1-to-28 teacher-to-student ratio may be needed to provide sufficient services to increase students' access to their LRE. To determine this, the district needs to consider factors such as the number of SAI minutes in a student's IEP and the percentage of time a student is in general education. The industry standard for SAI-based programs supporting students in their LRE is 20-24 students per special education teacher.

Learning Center Program Teachers

Learning centers are flexible spaces where students can receive targeted instructional support in a self-contained setting and also access general education settings with push-in support from a special education teacher or instructional aide.

The contract between the district and the teachers' association states, "Resource Specialist Program (RSP): Class size in a separate setting (i.e. Learning Strategies; does not include general education collaboration setting) should not exceed twenty-eight (28) students. No resource specialist unit member (including unit members in an elementary Learning Center model) shall have a caseload which exceeds twenty-eight (28) students."

In 2025-26, the district has 29.00 FTE learning center teachers. Based on caseload estimates provided by the district, these teachers manage the cases of 717 students, averaging 24.72 students per teacher, as shown in Table 10 below.

Table 10. Learning Center Teacher Staffing, 2025-26

Total Teacher FTE	Total Student Caseload	Average Teacher Caseload	Industry Standard	Staffing Needed to Meet Industry Standard	Staffing Above (+) or Below (-) Industry Standard
29.00	717	24.72	20-24 students per teacher	35.85 FTE (20 students per teacher) 29.88 (24 students per teacher)	-6.85 FTE (20 students per teacher) -0.88 (24 students per teacher)

Sources: District-provided data and industry standards.

In 2025-26, the learning center staffing is 1.00 to 7.00 FTE less than the industry standard caseload range.

Special Day Class Staffing – School-Age Programs

The Education Code does not define class size or caseload maximums for SDC programs. The industry standard caseload ranges for SDC programs are shown in Table 11 below.

Table 11. Industry Standard Class Size Numbers for Special Day Class Programs

Program Type	Industry Standard Caseload Range
Mild/Moderate Support Needs Special Day Class – Noncategorical	Transitional Kindergarten through Grade 12 – 12-15 students per 1 teacher
Extensive Support Needs Special Day Class – Noncategorical	Transitional Kindergarten through Grade 12 – 10-12 students per 1 teacher
Special Day Class – Autism Focus	Transitional Kindergarten through Grade 12 – 8-10 students per 1 teacher
Therapeutic Special Day Class – Mental Health and Behavioral Support Needs	Transitional Kindergarten through Grade 12 – 8-10 students per 1 teacher

Sources: Industry standards.

The contract between the district and the teachers' association states, "Special Day Class (SDC): Class size should not exceed 18 students. No special day class unit member shall have a caseload which exceeds eighteen (18) students."

Mild-to-Moderate Special Day Class Programs

In 2025-26, the district has 46.0 FTE SDC teachers of classes for students with mild-to-moderate support needs. Based on caseload estimates provided by the district, these teachers managed the cases of 629 students, averaging 13.67 students per teacher, as shown in Table 12 below.

Table 12. Mild-to-Moderate Special Day Class Program Teacher Staffing, 2025-26

Total Teacher FTE	Total Student Caseload	Teacher Caseload Average	Industry Standard Caseload Range	Staffing FTE Needed to Meet Industry Standard	Staffing FTE Above (+) or Below (-) Industry Standard
46.00	629	13.67	12-15 students per teacher	52.42 FTE (12 students per teacher) 41.93 FTE (15 students per teacher)	Within industry standard range

Sources: District-provided data and industry standards.

In 2025-26, the districtwide mild-to-moderate SDC teacher staffing is within the industry standard range.

Extensive Support Needs Special Day Class Program

In 2025-26, the district has 16.00 FTE SDC teachers for students with extensive support needs. Based on caseload estimates provided by the district, these teachers managed the cases of 164 students, averaging 10.25 students per teacher, as shown in Table 13 below.

Table 13. Extensive Support Needs Special Day Class Program Teacher Staffing, 2025-26

Total Teacher FTE	Total Student Caseload	Average Caseload Per Teacher	Industry Standard Caseload Range	Staffing FTE Needed to Meet Industry Standard	Staffing FTE Above (+) or Below (-) Industry Standard
16.00	164	10.25	10-12 students per teacher – cross-categorical	16.40 FTE (10 students per teacher) 13.67 FTE (12 students per teacher	Within industry standard range

Sources: District-provided data and industry standards.

In 2025-26, the districtwide extensive support needs SDC teacher staffing is within the industry standard range.

Therapeutic Special Day Class Program

In 2025-26, the district has 6.00 FTE SDC teachers for its therapeutic SDC program (counseling enriched classes). Based on caseload estimates provided by the district, these teachers managed the cases of 36 students, averaging 6.00 students per teacher, as shown in Table 14 below.

Table 14. Therapeutic Special Day Class Program Teacher Staffing, 2025-26

Total Teacher FTE	Total Student Caseload	Average Caseload Per Teacher	Industry Standard Caseload Range	Staffing FTE Needed to Meet Industry Standard	Staffing FTE Above (+) or Below (-) Industry Standard
6.00	36	6.00	8-10 students per teacher	4.50 FTE (8 students per teacher) 3.60 FTE (10 students per teacher)	+1.50 FTE (8 students per teacher) +2.40 FTE (10 students per teacher)

Sources: District-provided data and industry standards.

In 2025-26, the districtwide therapeutic SDC teacher staffing is higher than the industry standard range. Two therapeutic SDCs at Citrus Hill High School each have three students enrolled. This lowers the districtwide average caseload per teacher for this type of SDC. Staff reported that students will be returning from NPSs in 2026-27 and the therapeutic SDCs at Citrus Hill High School will have 10 to 12 students.

Autism Special Day Class Program

In 2025-26, the district has 14.00 FTE SDC teachers for its autism SDC program. Based on caseload estimates provided by the district, these teachers managed the cases of 128 students, averaging 9.14 students per teacher, as shown in Table 15 below.

Table 15. Autism Special Day Class Program Teacher Staffing, 2025-26

Total Teacher FTE	Total Student Caseload	Average Caseload Per Teacher	Industry Standard Caseload Range	Staffing FTE Needed to Meet Industry Standard	Staffing FTE Above (+) or Below (-) Industry Standard
14.00	128	9.14	8-10 students per teacher	16.00 FTE (8 students per teacher) 12.80 FTE (10 students per teacher)	Within industry standard range

Sources: District-provided data and industry standards.

In 2025-26, the districtwide autism SDC teacher staffing is within the industry standard range.

Special Day Class Staffing – Preschool Programs

The Education Code does not define class size or caseload maximums for preschool SDC programs. The industry standards for preschool program caseloads are shown in Table 16 below.

Table 16. Industry Standards for Preschool Special Day Class Programs

Program Type	Industry Standard Caseload Size
Preschool Special Day Class – Mild/Moderate Support Needs – Cross-Categorical	14 students per 1 teacher
Preschool Special Day Class – Extensive Support Needs – Cross-Categorical	10 students per 1 teacher
Preschool Special Day Class – Autism	9 students per 1 teacher

Sources: Industry standards.

Preschool Special Day Class Program

In 2025-26, the district has 9.00 FTE teachers for its preschool SDC program. Based on caseload estimates provided by the district, these teachers manage the cases of 84 students, as shown in Table 17 below.

Table 17. Preschool Special Day Class Program Teacher Staffing, 2025-26

School Level	Total Teacher FTE	Total Student Caseload	Average Caseload Per Teacher	Industry Standard Caseload Range	Staffing FTE Needed to Meet Industry Standard	Staffing FTE Above (+) or Below (-) Industry Standard
Preschool SDC Mild-to-Moderate Support Needs	6.00	58	9.67	14 students per teacher	4.14 FTE	+1.86 FTE
Preschool SDC Extensive Support Needs	2.00	21	10.50	10 students per teacher	2.10 FTE	-0.10 FTE
Preschool SDC Autism	1.00	5	5.00	9 students per teacher	0.56 FTE	Appropriate given one class at this support need level

Sources: District-provided data and industry standards.

In 2025-26, the preschool SDC teacher staffing for autism and extensive supports needs SDCs is appropriate given the size of these programs. In 2025-26, the preschool SDC teacher staffing for mild-to-moderate support needs program is 1.86 FTE higher than the industry standard.

Recommendations

The district should:

1. Annually compare RSP teacher staffing and caseloads to industry standards and ensure they are adequate to meet student needs.
2. Evaluate whether its learning center special education teacher staffing is adequate to meet student needs.
3. Annually monitor caseloads and student needs for its preschool and school-age SDC programs to determine if it needs to make staffing changes.

Special Education Instructional Aide Staffing

Special education instructional aides, also known as special education assistants or paraeducators, are trained professionals who work with students, typically under the direction of a classroom teacher. LEAs often employ special education instructional aides under different titles with distinct job descriptions to perform functions such as specialized academic instruction, specialized medical support, behavioral support, and 1-to-1 student support or intensive individual service (IIS). The district employs instructional aides under several different job descriptions.

Industry Standard SDC Instructional Aide Staffing Ratios

The industry standard base staffing for SDCs is to assign one instructional aide for every teacher of students with mild-to-moderate and extensive support needs. For SDCs serving students with autism, the base staffing standard is two special education instructional aides for every teacher. In addition, the industry standard for staffing in excess of the SDC base staffing level is determined by an adult-to-student ratio, as shown in Table 18 below.

Table 18. Industry Standard Instructional Aide Staffing and Adult-to-Student Ratios

SDC Support Level	SDC Focus	Industry Standard Special Education Instructional Aide Staffing	Adult-to-Student Ratio
Mild-to-Moderate	Cross-categorical	One to two six-hour special education instructional aides for a class size of 12-15	1-to-7
Extensive	Cross-categorical	One to two six-hour special education instructional aides for a class size of 10-12	1-to-5
All	Autism	Two to four six-hour special education instructional aides for a class size of 8-10	1-to-3

Source: Industry standards.

Note: Industry standard staffing for special education instructional assistants is determined by class size to meet an adult-to-student ratio, which includes the classroom teacher and special education instructional assistant(s).

District SDC Program Instructional Aide Staffing

FCMAT analyzed the district's 2025-26 instructional aide staffing in its SDCs for students with extensive support needs and autism as shown in Table 19 below. The district's instructional aide staffing in its learning centers and its preschool and counseling enriched SDCs was not analyzed because FCMAT does not have an industry standard adult-to-student ratio for these types of SDCs.

Table 19. SDC Instructional Assistant Allocation – District Compared to Industry Standards, 2025-26

School and SDC Class	SDC Enrollment	No. of Special Education Classroom Support Instructional Assistant(s)	Adult to Student Ratio (Teacher and Classroom Support Instructional Assistant(s) to Students)	Industry Standard Adult to Student Ratio (Teacher and Classroom Support Instructional Assistant(s) to Students)	Classroom Support Instructional Assistant Staffing Above (+) or Below (-) Industry Standard
Manuel L. Real Elementary - Life Skills	9	3	4-to-9 or 0.44	1-to-5 or 0.20	+2 above industry standard
Manuel L. Real Elementary - Life Skills	8	3	4-to-8 or 0.50	1-to-5 or 0.20	+2 above industry standard
Manuel L. Real Elementary - Life Skills	9	3	4-to-9 or 0.44	1-to-5 or 0.20	+2 above industry standard
Mary McLeod Bethune Elementary - Life Skills	10	4	5-to-10 or 0.50	1-to-5 or 0.20	+3 above industry standard
Mary McLeod Bethune Elementary - Life Skills	7	3	4-to-7 or 0.57	1-to-5 or 0.20	+2 above industry standard
Mary McLeod Bethune Elementary - Autism	11	4	5-to-11 or 0.45	1-to-3 or 0.33	+1 above industry standard
Mary McLeod Bethune Elementary - Autism	8	4	5-to-8 or 0.63	1-to-3 or 0.33	+2 above industry standard
Mary McLeod Bethune Elementary - Autism	10	4	5-to-10 or 0.50	1-to-3 or 0.33	+1 above industry standard
Rainbow Ridge Elementary - Autism	9	4	5-to-9 or 0.56	1-to-3 or 0.33	+2 above industry standard
Rainbow Ridge Elementary - Autism	9	4	5-to-9 or 0.56	1-to-3 or 0.33	+2 above industry standard
Rainbow Ridge Elementary - Autism	10	4	5-to-10 or 0.50	1-to-3 or 0.33	+1 above industry standard
Rainbow Ridge Elementary - Autism	10	3	4-to-10 or 0.40	1-to-3 or 0.33	Equal to industry standard
Rainbow Ridge Elementary - Autism	10	4	5-to-10 or 0.50	1-to-3 or 0.33	+1 above industry standard
March Middle School - Life Skills	11	3	4-to-11 or 0.36	1-to-5 or 0.20	+1 above industry standard

School and SDC Class	SDC Enrollment	No. of Special Education Classroom Support Instructional Assistant(s)	Adult to Student Ratio (Teacher and Classroom Support Instructional Assistant(s) to Students)	Industry Standard Adult to Student Ratio (Teacher and Classroom Support Instructional Assistant(s) to Students)	Classroom Support Instructional Assistant Staffing Above (+) or Below (-) Industry Standard
March Middle School - Life Skills	11	3	4-to-11 or 0.36	1-to-5 or 0.20	+1 above industry standard
March Middle School - Life Skills	11	2	3-to-11 or 0.27	1-to-5 or 0.20	Equal to industry standard
March Middle School - Autism	11	3	4-to-11 or 0.36	1-to-3 or 0.33	Equal to industry standard
March Middle School - Autism	8	3	4-to-8 or 0.50	1-to-3 or 0.33	+1 above industry standard
Citrus Hill High School - Life Skills	11	3	4-to-11 or 0.36	1-to-5 or 0.20	+1 above industry standard
Citrus Hill High School - Life Skills	10	3	4-to-10 or 0.40	1-to-5 or 0.20	+2 above industry standard
Citrus Hill High School - Life Skills	13	4	5-to-13 or 0.38	1-to-5 or 0.20	+2 above industry standard
Citrus Hill High School - Life Skills	14	4	5-to-14 or 0.36	1-to-5 or 0.20	+2 above industry standard
Rancho Verde High School - Autism	9	3	4-to-9 or 0.44	1-to-3 or 0.33	+1 above industry standard
Rancho Verde High School - Autism	9	4	5-to-9 or 0.56	1-to-3 or 0.33	+2 above industry standard
Val Verde Academy - Bridges to Adulthood - Life Skills	7	2	3-to-7 or 0.43	1-to-5 or 0.20	+1 above industry standard
Val Verde Academy - Bridges to Adulthood – Life Skills	8	2	3-to-8 or 0.38	1-to-5 or 0.20	+1 above industry standard
Val Verde Academy - Bridges to Adulthood - Life Skills	10	2	3-to-10 or 0.30	1-to-5 or 0.20	+1 above industry standard
Val Verde Academy - Bridges to Adulthood - Life Skills	10	3	4-to-10 or 0.40	1-to-5 or 0.20	+2 above industry standard

School and SDC Class	SDC Enrollment	No. of Special Education Classroom Support Instructional Assistant(s)	Adult to Student Ratio (Teacher and Classroom Support Instructional Assistant(s) to Students)	Industry Standard Adult to Student Ratio (Teacher and Classroom Support Instructional Assistant(s) to Students)	Classroom Support Instructional Assistant Staffing Above (+) or Below (-) Industry Standard
Val Verde Academy - Bridges to Adulthood - Autism	8	3	4-to-8 or 0.50	1-to-3 or 0.33	+1 above industry standard
Val Verde Academy - Bridges to Adulthood - Autism	8	3	4-to-8 or 0.50	1-to-3 or 0.33	+1 above industry standard

Source: Industry standards and district-reported data.

Notes: Only schools with SDCs were included in this table.

The district's instructional assistant staffing in its learning centers, and its preschool and counseling enriched SDCs were not analyzed because FCMAT does not have an industry standard adult-to-student ratio for these types of SDCs.

In 2025-26, the districtwide instructional assistant staffing for its SDCs for students with extensive support needs and autism is higher than the industry standards. In the same year, if the district had staffed its SDC program for students with extensive support needs using the industry standard adult-to-student ratio, it may have been able to reduce by 25 instructional assistants. In 2025-26, if the district had staffed its SDC program for students with autism using the industry standard adult-to student ratio, it may have been able to reduce by 16 instructional assistants. However, the district has a lower percentage of its students with extensive support needs receiving 1-to-1 support from an instructional assistant than what is observed across the state as described in the "1-to-1 Student Support" section of this report. Instead of adding 1-to-1 support, the district endeavors to add extra classroom instructional assistant support to meet student needs. This is a positive practice because it focuses on student independence and supports student needs in a less restrictive manner. In addition, the district has a policy stating that staff toileting a student must do so in pairs, which increases the number of instructional assistants needed in an SDC.

1-to-1 Student Support

Industry practice commonly refers to both the assessment process and the special education paraeducator role as special circumstance instructional assistance (SCIA). The district uses the Riverside County SELPA's Related Services Independence Assistance (RSIA) assessment process to make decisions regarding assignment of 1-to-1 student support. This process clarifies decision-making procedures and recognizes that 1-to-1 instructional assistance is a significant program decision that should be based on a thorough, data-driven evaluation that includes considering all less-restrictive alternatives. The SELPA's assessment aligns with industry standards because it focuses on personal independence, promotes individual decision-making, works to maximize existing supports, and is based on data-driven assessment. Staff reported the RSIA assessment is used consistently across district schools to determine whether there is a need for 1-to-1 student support.

In 2025-26, the district has 39 instructional assistants who are assigned to provide 1-to-1 student support. While there is no established industry standard for special education instructional assistants providing 1-to-1 student support, in Val Verde Unified, 1.40% of the students in its special education program have a 1-to-1 instructional assistant. Of the last seven districts FCMAT studied, only one district had a percentage comparable to Val Verde Unified. The other six districts FCMAT studied had assigned an average of 4.32% of the students in their special education program a 1-to-1 instructional assistant.

Staff reported that Val Verde Unified uses extra classroom instructional assistant support to meet student needs instead of assigning a 1-to-1 instructional assistant whenever possible. This is a positive practice because even though a parent/guardian or staff member's request for a student to have 1-to-1 support may be well meaning, according to the University of Colorado at Denver's Paraprofessional Resources and Research Center, it can hinder the student's education in the following ways:

- The paraeducator may become the student's primary service provider, and the teacher's involvement and interactions with the student may be limited. The University of Colorado at Denver's Paraprofessional Resources and Research Center cautions, "This practice is further exacerbated when paraeducators are not qualified and or trained. It is not in the best interest of the students with most complex needs to be taught by the least qualified staff member."
- The paraeducator's constant presence may cause the student to become overly dependent on that adult to do things they could otherwise do independently.
- The paraeducator may create social barriers between the student they are supporting and the student's peers.

Recommendations

The district should:

1. Use the industry standard adult-to-student ratios to determine the assignment of special education instructional assistants to SDCs. However, since the district focuses on LRE and endeavors to assign extra classroom support to address individual student needs, adjust the industry standard adult-to-student ratios based on the student needs in each individual class.
2. Continue to require its RSIA assessment to be used to determine whether a student needs 1-to-1 student support. Provide regular training and support for staff on the RSIA assessment.

Related Service Provider Staffing and Caseloads

Related services are the developmental, corrective and other services required to help a child with a disability benefit from special education (34 CFR 300.34). These services are written into students' IEPs and include but are not limited to physical therapy, speech and language therapy, and occupational therapy (OT).

FCMAT analyzed staffing ratios for the district's adaptive physical education (APE) teacher, OTs, credentialed school nurses, school psychologists, and SLPs. Staffing ratios for other related service providers were not analyzed because there is no established industry standard for them, or the SELPA provides those services. The industry standards for related service providers are shown in Table 20 below.

Table 20. Industry Standard Provider-to-Student Ratios

Provider Type	Industry Standard or Education Code Provider-to-Student Ratio
Psychologist	1-to-977
SLP (preschool)	1-to-40
SLP (ages 5-22)	1-to-55
APE Teacher	1-to-45-55
Physical Therapist	1-to-45-55
Occupational Therapist	1-to-45-55
Vision and Orientation and Mobility	1-to-10-30
Deaf and Hard of Hearing	1-to-15-25
Nurse	1-to-2,274

Sources: Industry standards, Education Code 56363.3, and Pupil Services Staff by Type (CDE).

Adapted Physical Education

Districts need to annually review APE teacher caseload projections, assessment loads, the number of schools each APE teacher supports, driving times between schools, direct and consultation service minutes, how services are provided, and students' needs to determine if they need to change the number of APE teachers.

In 2025-26, the district has 3.00 FTE APE teachers who have a caseload of 37.00 students receiving direct services, as shown in Table 21 below.

Table 21. Adapted Physical Education Teacher Staffing, 2025-26

Provider	Number of FTE	2025-26 Total Caseload	Caseload Average	Industry Standard Provider-to-Student Ratio	FTE Needed to Meet Industry Standard	Staffing Above (+) or Below (-) Industry Standard
APE Teacher	3.00	37.00	12.33	1-to-45-55	0.82 FTE (to meet 1-to-45) 0.67 FTE (to meet 1-to-55)	+2.18 FTE (above 1-to-45) +2.33 FTE (above 1-to-55)

Sources: District-provided data and industry standards.

Note: Only students receiving direct services from the district's APE teacher were included in the total caseload and related calculations.

As shown in the table, the district is staffed 2.00 FTE above the industry standard staffing level range for APE teachers in 2025-26. The district's current staffing is necessary due to its APE service delivery model; two of its APE teachers are the teacher of record for physical education classes at the middle and high schools.

Credentialed School Nurses

Districts need to annually review their enrollment, special education enrollment, duties performed by credentialed school nurses and other health specialists, schoolwide needs, driving time between schools, and students' needs to determine if changes to credentialed school nurse staffing are needed.

In 2025-26, the district has 7.00 FTE credentialed school nurse positions, with an average caseload of 2,673.86 students, as shown in Table 22 below.

Table 22. Credentialed School Nurse Staffing, 2025-26

Provider	Number of FTE	2025-26 Census Day Enrollment	Caseload Average	Industry Standard Provider-to-Student Ratio	FTE Needed to Meet Industry Standard	Staffing Above (+) or Below (-) Industry Standard
Credentialed School Nurse	7.00	18,717	2,673.86	1-to-2,274	8.23 FTE	-1.23 FTE

Sources: Pupil Services Staff by Type (CDE), district-provided data, and DataQuest.

As shown in the table, the district is staffed more than 1.00 FTE less than the industry standard staffing levels for credentialed school nurses. However, in addition to credentialed school nurses, the district has licensed vocational nurses (LVNs). The district's LVN job description states:

> Under the supervision of the Director of Special Education and the district nurses the Licensed Vocational Nurse provides direct clinical care to meet the health needs of students; documents and maintains students' health information required by federal/state/local agencies, and provides appropriate care and/referral for ill, medically fragile, and/or injured students, as required.

Therefore, the district may be able to support school and student needs with its current credentialed school nurse and LVN staffing.

Occupational Therapy

Districts need to annually review OT caseload projections, assessment loads, the number of schools each OT serves, driving time between schools, direct and consultation service minutes, and students' needs to determine the number of OTs needed.

In 2025-26, the district has 3.00 FTE OT positions, each with an average caseload of 48.00 students receiving direct services, as shown in Table 23 below.

Table 23. District Occupational Therapist Staffing, 2025-26

Provider	Number of FTE	2025-26 Total Caseload	Caseload Average	Industry Standard Provider-to-Student Ratio	FTE Needed to Meet Industry Standard	Staffing Above (+) or Below (-) Industry Standard
Occupational Therapist	3.00	144	48.00	1-to-45-55	3.20 FTE (to meet 1-to-45) 2.62 FTE (to meet 1-to-55)	Within industry standard range

Sources: District-provided data and industry standards.

Notes: Only students receiving direct services from occupational therapists were included in the total caseload and related calculations.

As shown in the table, the district is staffed within the industry standard range for OTs.

Physical Therapy

Districts need to annually review PT caseload projections, assessment loads, the number of schools each PT serves, driving time between schools, direct and consultation service minutes, and students' needs to determine the number of PTs needed.

In 2025-26, the district has a 0.75 FTE PT position, with a caseload of 21.00 students receiving direct services, as shown in Table 24 below. In addition, the district contracts with a nonpublic agency for an additional part-time PT who works two days per week in the district to support student needs.

Table 24. District Physical Therapist Staffing, 2025-26

Provider	Number of FTE	2025-26 Total Caseload	Caseload Average	Industry Standard Provider-to-Student Ratio	FTE Needed to Meet Industry Standard	Staffing Above (+) or Below (-) Industry Standard
Physical Therapist	0.75	21	21.00	1-to-45-55	0.47 FTE (to meet 1-to-45) 0.38 FTE (to meet 1-to-55)	+0.28 FTE (to meet 1-to-45) +0.37 FTE (to meet 1-to-55)

Sources: District-provided data and industry standards.

Notes: Only students receiving direct services from occupational therapists were included in the total caseload and related calculations.

Local educational agencies serve students with orthopedic impairments and other disabilities requiring PT as a related service through their own SDCs, regional SDCs, and NPSs. Compared to what is observed across the state, this district serves a higher percentage of students with these needs in their own SDCs and therefore likely needs additional PT staffing to support student needs. Given this, the district's staffing for PTs appears appropriate.

School Psychologists for School-Age Programs

Districts need to annually review the following items to help determine how many FTE school psychologist positions are needed:

- The number of initial psychoeducational assessments in the current school year.

- The number of annual and triennial psychoeducational assessments expected next school year.
- The number of early reassessments expected next school year.
- Total student enrollment.
- Special education enrollment.
- Individual student and school needs.

In 2025-26, the district has 19.00 FTE school psychologist positions serving school-age programs, each with an average caseload of 985.11 students, as shown in Table 25 below. The district also has 3.00 FTE school psychologists who perform preschool assessments and were not included in this analysis. In addition, the district has a 1.00 FTE school psychologist on special assignment who does not perform psychoeducational assessments so was not included in this analysis.

Table 25. School Psychologist Staffing for School-Age Programs Compared to Industry Standard, 2025-26

Provider	Number of FTE	2025-26 Census Day Enrollment	Caseload Average	Industry Standard Provider-to-Student Ratio	FTE Needed to Meet Industry Standard	Staffing Above (+) or Below (-) Industry Standard
School Psychologist for School-Age Programs	19.00	18,717	985.11	1-to-977	19.16 FTE	-0.16 FTE

Sources: District-provided data, Pupil Services Staff by Type (CDE), and DataQuest.

Note: Only the district's 19.00 FTE school psychologists who serve school-age students were included in this staffing comparison.

As shown in the table, the district is staffed approximately equal to the industry standard staffing levels for school psychologists for school-age programs.

Speech and Language Pathologists

Education Code 56441.7(a) establishes a maximum caseload of 40 students for SLPs serving preschool students. Education Code 56363.3 addresses SLPs serving school-age students. It states, "The average caseload for language, speech, and hearing specialists in special education local plan areas shall not exceed 55 cases, unless the local plan specifies a higher average caseload and the reasons for the greater average caseload." For SLPs serving students in both programs, FCMAT uses a blended maximum caseload of 47.5 students. Districts need to annually review SLP caseload projections and students' needs to determine if changes to SLP staffing are needed.

Speech and Language Pathologists Serving Students in the Preschool Programs

In 2025-26, the district has 4.00 FTE SLPs who provide speech and language therapy for preschool-age students. These SLPs have an average caseload of 32.00 students, as shown in Table 26 below.

Table 26. Speech and Language Pathologist Staffing for SLPs Working with Preschool-Age Students, 2025-26

Provider	Number of FTE	2025-26 Total Caseload	Caseload Average	Education Code Maximum	FTE Needed to Meet Standard	Staffing Above (+) or Below (-) Standard
SLPs for Pre-school-age Students	4.00	128	32.00	1-to-40	3.20 FTE	+0.80 FTE

Sources: District-provided data and EC 56441.7(a).

Note: Only preschool-age students receiving services from an SLP were included in the caseload average for comparison with the EC 56441.7(a) standard.

As shown in the table, the district is staffed 0.80 FTE above what is required to meet the standard for SLPs serving preschool-age students. However, the district does not have an SLP designated to perform initial speech and language assessment for preschool-age students. Instead, all four SLPs for preschool-age students perform initial assessments. At the time of this study, 47 students were going through their initial preschool assessment or will be added to the caseloads of these four SLPs for preschool-age students upon their third birthday when the district becomes responsible for providing their special education services. While all of the students undergoing their initial speech and language assessment may not qualify for services, if they do, the district will have a total caseload of 175 preschool-age students receiving speech and language services and will need 4.38 FTE SLPs to meet the EC 56441.7(a) standard of 40 students.

Speech and Language Pathologists Serving Students in the Preschool and School-Age Programs

Education Code 56441.7(a) establishes a maximum caseload of 40 students for SLPs serving preschool students, and Education Code 56363.3 establishes a maximum caseload of 55 students for SLPs serving students ages 5-22. For SLPs serving students in both programs, FCMAT uses a blended maximum caseload of 47.5 students.

In 2025-26, at the time of FCMAT's visit, the district has a 1.00 FTE SLP who works with preschool-age and school-age students. This SLP has a caseload of 52.00 students, as shown in Table 27 below.

Table 27: Speech and Language Pathologist Staffing for SLPs Working with Preschool-Age and School-Age Students, 2025-26

Provider	Number of FTE	2025-26 Total Caseload	Caseload Average	Industry Standard	FTE Needed to Meet Industry Standard	Staffing Above (+) or Below (-) Industry Standard
SLPs for Preschool-Age and School-Age Students	1.00	52.00	52.00	1-to-47.5	1.09 FTE	-0.09 FTE

Sources: District-provided data and EC 56441.7(a) and EC 56363.3

Note: Only preschool-age and school-age students receiving services from a SLP were included in the caseload average for comparison with the EC 56441.7(a) and EC 56363.3 standards.

As shown in the table, the district is staffed just under the industry standard for SLPs serving both preschool-age and school-age students. The district needs to review SLP caseload projections and students' needs to determine if its SLP staffing for SLPs serving preschool-age and school-age students is adequate to meet students' needs.

Speech and Language Pathologists Serving School-Age Students

In 2025-26, the district has 22.00 FTE SLPs working exclusively with school-age students who each manage an average caseload of 59.64 students, as shown in Table 28 below.

Table 28. School-Age Speech and Language Pathologist Staffing, 2025-26

Provider	Number of FTE	2025-26 Total Caseload	Caseload Average	Education Code Standard Provider-to-Student Ratio	FTE Needed to Meet Education Code Standard	Staffing Above (+) or Below (-) Education Code Standard
SLPs – School-Age	22.00	1,312	59.64	1-to-55	23.85	-1.85 FTE

Sources: District-provided data and EC 56363.3.

As shown in the table, if considering the district's staffing and caseload numbers (not SELPA-wide), the district is staffed approximately 2.00 FTE less than the Education Code standard staffing level for SLPs for school-age programs.

Recommendations

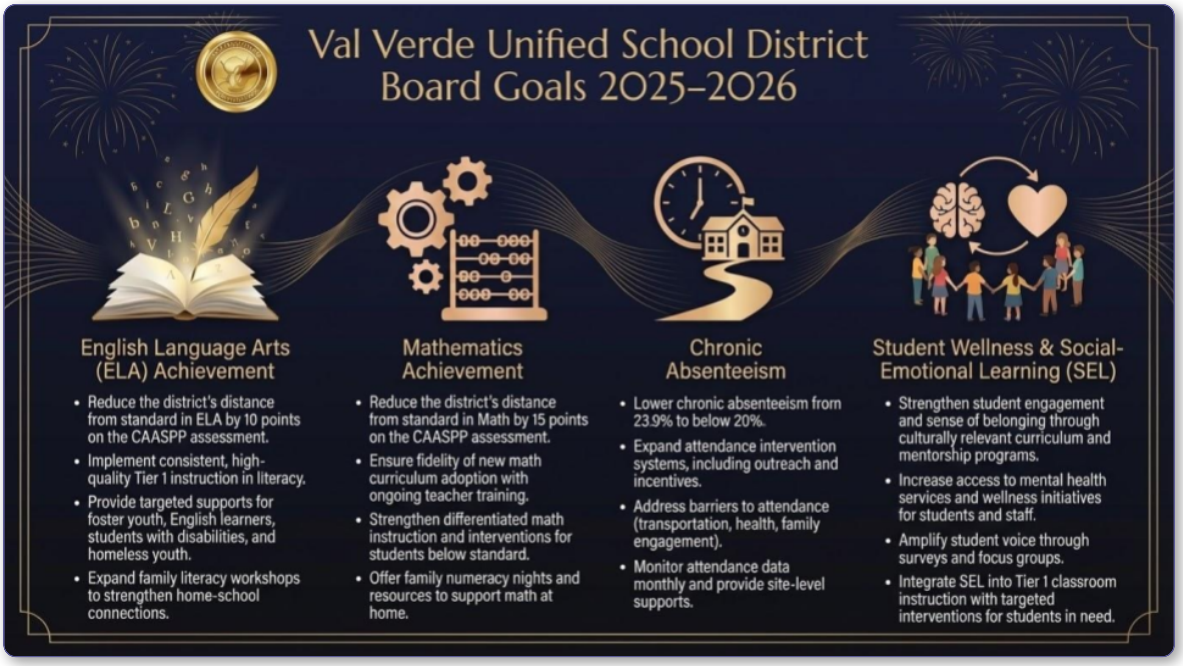
The district should:

1. Annually review staffing for all related service providers to determine whether it is aligned with the industry standards and meets student needs.
2. Determine whether its current credentialed school nurse staffing is adequate to meet student needs.
3. Increase its SLP staffing to comply with the Education Code staffing standards and meet student needs.

Professional Learning Plan

The district's board of trustees established four 2025-26 board goals to guide the district's work. These goals are aligned with the district's local control accountability plan (LCAP) and the district's MTSS Strategic Plan, as shown below.

Figure 3. 2025-26 Board Goals 2025-2026



Source: Val Verde Unified School District website.

Certain staff reported that extensive, ongoing professional learning has been provided on the district's MTSS as a whole, and now more extensive work in certain targeted areas is needed to increase the impact this framework is having on students' success. The Policy Analysis for California Education (PACE) recently published a practice brief titled, "How Districts Scale Instructional Improvement That Lasts." This brief states, "Senior leaders must exercise their authority to deprioritize some things so that the organization can align around a few ongoing, critical goals. 'When everything is a priority, nothing is a priority' is a common saying, and its intuitive truth is easy to see." This PACE brief identifies common pitfalls and highlights the importance of district systems and the pivotal role district leaders need to play in successfully implementing improvement initiatives across district schools. Accordingly, the district's professional learning priorities need to be aligned with these four board goals.

Training for Teachers

A district's professional learning plan for instructional staff should consider the needs of students with disabilities and align with evidence-based practices, such as an MTSS, as outlined in the 2015 report on one system. This alignment is essential to improve support for all students, including those with disabilities.

As described in the "District Alignment with the 2015 Report on One System" section of this report, the district is implementing a comprehensive MTSS Strategic Plan which is designed to create positive learning environments and support high levels of learning for all students, including students with disabilities. The 2015 report on one system recommends educators use UDL to design accessible and inclusive learning experiences for all students and accommodate diverse learners. The academic supports outlined in the district's MTSS include a focus on UDL. As described in the "District Implementation of MTSS" section of this report, the district's MTSS supports students' access to their least restrictive environment. Staff indicated that the district's MTSS Strategic Plan is not a one-time initiative; instead, it is a system of academic, behavioral and social-emotional supports with associated processes that are continually revisited and refined. The district provides ongoing professional learning aligned with its MTSS Strategic Plan according to identified needs. The district needs to continue this work.

Training for Special Education Instructional Assistants

The best practice is for special education instructional assistants to receive nonviolent crisis intervention training according to recertification requirements and regular training on student support strategies throughout the school year. Staff reported that nonviolent crisis intervention training is offered to special education instructional assistants on certain Saturdays during the school year; it is optional and instructional assistants who attend are paid. Staff indicated that since nonviolent crisis intervention training is not required or offered during the regular workday, many special education instructional assistants are not certified. Staff reported that special education instructional assistants participate in mandated training and have additional training (depending on which program they support) during nonstudent workdays or on early release days. Despite this, most staff members indicated that special education instructional assistants would benefit from additional training addressing:

- Disability awareness.
- Behavior intervention training.
- Differentiation strategies.
- Providing accommodations and modifications.
- Inclusive practices.

Recommendations

The district should:

1. Continue to provide professional learning aligned with its MTSS for instructional staff according to identified needs.
2. Continue to provide professional learning for instructional assistants. Consider prioritizing training addressing disability awareness, behavior intervention training, differentiation strategies, providing accommodations and modifications, and inclusive practices.
3. Develop a plan for more of its special education instructional assistants to receive nonviolent crisis intervention training. Prioritize special education instructional assistants working in the autism and social-emotional support SDC programs.

Unrestricted General Fund Contribution to Special Education

Fiscal Background

California's special education funding structure was established by and is commonly referred to as Assembly Bill (AB) 602 (Chapter 854, Statutes of 1997), which became effective during the 1998-99 fiscal year.

Under AB 602, special education funding is based on the average daily attendance (ADA) of all students in a school district, regardless of the number of students served in special education programs or the cost to serve them. California distributes special education funds to SELPAs based on their member districts' total ADA counts.

In addition to AB 602 state funding, districts receive a small amount of federal funds. These funds are designed to supplement the general education program, not to support a stand-alone program.

The combined state and federal funds are insufficient to pay for even the most efficient special education programs. Districts make contributions to special education from local resources generated by all students, including those in special education. These contributions are the amount of funding districts must transfer from their unrestricted general funds to pay for the portion of special education costs that exceeds program revenues.

Federal law requires districts to spend at least the same amount of state and local funds on special education services in each successive year. This is commonly referred to as the maintenance of effort (MOE). This requirement has limited exemptions, and if a district is considering reductions to its total general fund contribution to special education, it is required to follow the guidelines in the IDEA (20 USC 1413 (a)(2)(B)), which lists the following circumstances as exceptions that allow a district to reduce the amount of state and local funds it spends on special education:

i. Voluntary departure, by retirement or otherwise, or departure for just cause, of special education or related services personnel;
ii. A decrease in the enrollment of children with disabilities;
iii. The termination of the obligation of the agency to provide a program of special education to a particular child with a disability that is an exceptionally costly program, as determined by the state educational agency, because the child:
    a. Has left the jurisdiction of the agency;
    b. Has reached the age at which the obligation of the agency to provide free and appropriate public education to the child has terminated; or
    c. No longer needs the program of special education; or
iv. The termination of costly expenditures for long-term purchases, such as the acquisition of equipment or the construction of school facilities.

The year-end expenditures charged to special education goal codes in the SACS, which is the state's financial reporting format, and allocated expenses in the Program Cost Report are used to calculate special education MOE. Districts need to monitor their MOE throughout the year and analyze forecasts of MOE calculations at first and second interim financial reporting periods. Districts should be mindful of what expenses are charged to special education SACS goal codes, including for non-special education SACS resource codes, because those may increase the MOE. This district is the AU of the Riverside County SELPA and must be mindful to code SELPA expenses in accordance with the California School Accounting Manual (CSAM), so that SELPA expenses do not accrue to the district MOE. As described in the following “Building Comparable Data” section of this report, certain SELPA AU revenues and expenses were exported into the district’s official data file submitted to the CDE.

In addition, districts should monitor reductions in expenditures to determine if any meet one of the exceptions that may allow the district to reduce the amount of state and local funds it spends on special education.

Building Comparable Data

Resource codes in the SACS are used to identify revenues and expenditures that have specific accounting or reporting requirements or that are legally restricted. Special education SACS resource codes are used to record special education spending and therefore contain vital information about a district’s unrestricted general fund contribution to its special education program.

The special education financial reporting methods used by districts, county offices of education and SELPAs can vary. For example, Val Verde Unified School District includes special education transportation expenses and legal expenses, while other districts may exclude these expenses. There are also differences in how special education funds are allocated by SELPAs and what expenses are paid by the SELPA to support district students. Because of these differences, it is not always possible to accurately compare a district’s unrestricted general fund contribution to those of other districts. However, a district should evaluate a contribution that is excessive compared to other districts or that is increasing disproportionately compared to other costs.

To calculate an unrestricted general fund contribution amount that can be compared year to year and includes expenditures most districts classify as special education, FCMAT made the following adjustments to the district’s SACS data:

- **One-Time Funds Adjustments:** To improve multiyear continuity, FCMAT used only ongoing special education income. FCMAT removed one-time funding posted in SACS totaling $2,401,594 in 2021-22, $334,955 in 2022-23, and $57,516 in 2023-24. It appears that special education expenditures charged to these one-time state and federal income sources were ongoing and were budgeted by the district as such beginning in 2022-23. There were no adjustments for one-time funding needed for 2024-25.

- **Journal Entries Corrected after the January 30, 2026 Second Interim Cutoff Date:** Four journal entries were made between January 1, 2026, and January 28, 2026, which caused the 2025-26 budget for books and supplies at the second interim reporting period to have a balance of -$70,579. These entries were reversed by the district between March 4, 2026, and March 12, 2026, adding back $624,531. FCMAT updated the 2025-26 second interim district budget data to reflect this correction.

- **SELPA Administrative Unit Income and Expenses**: Val Verde Unified functions as the SELPA AU. Certain SELPA AU revenues and expenses were exported into the district’s official data file submitted to the CDE. The CSAM defines how AUs should code income and expenses. This includes SACS resource, function, goal, and object codes, which differentiate the data so that a SELPA's administrative activities are distinguished from the district's administrative activities in the SACS file. Details to support the SELPA’s income and expenses were provided by the district and compared with the official SACS data file.

- **Special Education Transportation Adjustments:** Reimbursements to parents paid in lieu of district provided transportation were charged to the administration function code 2100, instead of transportation function code 3600. These expenses were added back to the transportation costs as follows: $9,882 in 2021-22, $10,612 in 2022-23, $9,325 in 2023-24, $14,938 in 2024-25 and $18,000 in 2025-26 (budgeted).

- **Indirect Cost Adjustments:** Although the district charges few indirect costs, full indirect costs have been charged to all special education programs using the CDE's approved rates for all the comparison years. The best practice is to charge the full indirect rate to all programs, including those without special education SACS resource codes, so that the true cost of the special education program can be determined.

District Special Education Expenses

FCMAT analyzed the district's special education income and expenditures, using only ongoing income from fiscal years 2021-22 to 2024-25 (one-time 2021-22, 2022-23, and 2023-24 income was excluded), as shown in Table 29 below. As described in the "Building Comparable Data" section, FCMAT added district transportation charges that were charged to administration and removed all identifiable duplicate SELPA income and expenses, so they were not double counted. In addition, FCMAT included the correction to the 2025-26 journal entry, which had accidentally eliminated the budget for books and supplies. Special education transportation costs are reported separately in Table 29 due to their unique expense trends. Data from 2021-22 was used as the base for calculating the percent change in the "Adjusted Historical 2022-23" column.

Table 29. Comparison of Adjusted Special Education Expenses Using Ongoing Income Only, 2022-23 to 2025-26

Category	Adjusted Historical 2022-23	Adjusted Historical 2023-24	Adjusted Historical 2024-25	Budget 2025-26	Average Historical Annual Rate
Increase in Special Education Students	3.8%	6.1%	5.9%	5.2%	5.3%
Increase/Decrease in Ongoing Income	14.2%	11.6%	-2.0%	6.2%	7.9%
Increase in Certificated Salaries	12.1%	16.0%	7.3%	7.4%	11.8%
Increase in Classified Salaries	23.6%	25.6%	15.5%	13.5%	21.6%
Increase in Benefits	20.8%	18.5%	11.1%	11.7%	16.8%
Increase/Decrease in Books and Supplies	42.9%	-24.4%	23.0%	-24.1%	13.9%
Increase in Services	37.9%	6.6%	11.0%	9.6%	18.5%
Increase in Transportation Services	4.0%	12.8%	12.2%	15.8%	9.7%
Increase/Decrease in Other Tuition	23.8%	-4.9%	33.4%	-7.6%	17.4%
Increase in Adjusted General Fund Contribution	37.9%	6.6%	11.0%	9.6%	18.5%
Adjusted Dollar Amount of General Fund Contribution	$26,561,535	$32,023,098	$38,685,165	$44,269,997	N/A
Adjusted Dollar Amount of Special Education Expenses	$49,438,441	$56,135,496	$61,987,241	$69,292,419	N/A

Sources: Official SACS unaudited actuals, 2025-26 budget as of January 30, 2026, district provided journal entries from 2025-26, district provided SELPA income and expenses, and Enrollment Multi-Year Summary for Charter and Non-Charter Schools - Val Verde Unified.

Notes: Official SACS data were adjusted as described in the "Building Comparative Data" section of this report.

The "Adjusted Dollar Amount of Special Education Expenses" and "Adjusted Dollar Amount of General Fund Contribution" categories were adjusted to match footnoted entries in the district's budget.

Special Education Funding and Expenses

During the review period, the number of students identified for special education increased by an average of 5.3% per year, and adjusted expenses increased by approximately 14.9% per year. The district's ongoing special education funding over the review period increased by an average of 7.9% per year. In 2025-26, the district is projecting a 6.2% increase in special education income, primarily because of increased funding in Mental Health-Related Services.

District transportation income is generated, in part, from expenses coded to SACS Function Code 3600, as shown in the district's unaudited actuals. These 2024-25 expenses will determine 2025-26 reimbursement amounts. However, parents paid in lieu of district transportation expenses have not been coded to SACS Function Code 3600. Additionally, no NPS SELPA-paid home-to-school transportation expenses have been coded to SACS Function Code 3600. Failure to consistently report all transportation expenses billed to the district may have resulted in lost transportation income.

District transportation expenses increased by an average of 9.7% per year during the review period. The district contracts with another district for home-to-school transportation services. The district reported that it anticipates putting this contract out for bid soon to determine if it can reduce expenses.

Staffing Costs

From 2021-22 to 2024-25, certificated special education staffing and salaries rose by 15.5% beyond negotiated raises and step and column changes, primarily due to adding more special education teachers, program specialists, and teachers on special assignment. Classified special education salaries rose by 48.5% beyond negotiated and standard increases. Support staff expanded to include more instructional assistants for new programs, and mental health therapists across all campuses.

In its 2025-26 budget, the district is projecting a 7.4% increase in special education certificated employee staffing costs, and a 13.5% increase in nontransportation-related classified employee staffing costs.

Cost of Supplies

From 2021-22 and 2024-25 the cost of supplies increased by an average of 13.9% per year. As of the 2025-26 second interim financial reporting period, the district had a negative supplies budget. An entry to correct it was not included in the SACS data but was included in this analysis. The 2025-26 budget is higher than previous years due to the district's increased use of low-incidence funds.

Cost of Services

From 2021-22 to 2024-25, contracted service costs (excluding transportation) rose by an average of 18.5% per year. This increase was primarily due to increased costs of NPS placements and consultants. The district's 2025-26 budget for services appears to be approximately $600,000 less than its projected expenses for 2025-26. However, the shortfall may be covered by budgeting for salary increases that have not yet been negotiated.

Cost of Nonpublic School and Residential Treatment Center Services

According to DataQuest and district CALPADS data, the number of district students attending an NPS or RTC increased by two students between 2022-23 and 2025-26, as shown in Table 30 below. However, staff reported that certain invoices for students placed in an NPS are paid by the SELPA and then passed on to the district for reimbursement. Due to that and staff turnover, not all students attending an NPS or RTC appear to have been reported by the district in CALPADS or included in the district's attendance system. Staff reported NPS and RTC enrollment is shown in Table 30 below.

Table 30. District NPS and RTC Expenditures and District Reported and CALPADS NPS and RTC Enrollment, 2022-23 through 2025-26

	2022-23	2023-24	2024-25	2025-26
Number of Students (Staff Reported)	16	18	22	18
Number of Students (DataQuest)	11	11	14	13
District Expenditures	$695,617	$759,956	$954,016	N/A

Sources: Enrollment for Charter and Non-Charter Schools -Val Verde Unified School District (CDE) for 2022-23 through 2025-26.

Staff reported that the district budgeted for a 15.7% decrease for NPS and RTC student services in 2025-26. The district's average cost for a student placed at an NPS over the last two years was $39,859.71. This cost, reported by the district, decreased by 0.6% between 2023-24 and 2024-25.

District Unrestricted General Fund Contribution

The district's adjusted unrestricted general fund contributions, including transportation and expenditures for full indirect costs, reductions for one-time income, and reductions for duplicate entries belonging to the SELPA and not the district, are shown in Table 31 below.

Table 31. District's Adjusted Unrestricted General Fund Contributions to Special Education (Including Transportation), 2021-22 through 2024-25

Category	2021-22	2022-23	2023-24	2024-25
Adjusted Unrestricted General Fund Contribution	$22,805,433	$26,561,535	$32,023,098	$38,685,165
Percentage of Adjusted Special Education Costs	55.7%	53.7%	57.0%	62.4%

Sources: Official SACS unaudited actuals and district provided SELPA data.

Note: Official SACS data were adjusted as described in the "Building Comparative Data" section of this report.

In 2025-26, the district's unrestricted general fund is estimated to be 63.9% of adjusted special education costs. Since 2021-22, costs for salaries, benefits, NPS placements, and NPA services have risen significantly, while special education income has not kept pace.

Recommendations

The district should:

1. Continue to monitor its unrestricted general fund contribution to the special education program.
2. Disaggregate, monitor and track special education NPA, NPS and RTC costs separately in SACS, and annually analyze trend data to use for budgeting.

3. Record NPS and RTC transportation expenses and payments to parents transporting their student in lieu of district provided transportation to SACS Function Code 3600 to generate transportation income.
4. Conservatively budget for increases in NPA, NPS, and transportation service expenditures. Compare year-to-date actual to budgeted expenditures at the interim reporting periods and adjust the budget accordingly.
5. Code SELPA expenses according to the CSAM so that the district’s MOE reporting and data files are differentiated from the SELPA’s and the district may accurately determine its expenditures.

Appendix

A. Study Agreement

FCMAT

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
FOR MANAGEMENT ASSISTANCE

This study agreement, hereinafter referred to as Agreement, is made and entered into by and between the Fiscal Crisis and Management Assistance Team, hereinafter referred to as the Team or FCMAT, and the Val Verde Unified School District, hereinafter referred to as the Client; collectively, FCMAT and Client are hereinafter referred to as the Parties. This Agreement shall become effective from the date of execution hereof by FCMAT.

1. <u>BASIS OF AGREEMENT</u>

   FCMAT provides a variety of services to local education agencies (LEAs) as authorized by Education Code (EC) 42127.8(d). The Client has requested that the FCMAT assign professionals to study specific aspects of the Client's operations. The professionals will include FCMAT staff and may include professionals from county offices of education, school districts, charter schools, community colleges, other public agencies or private contractors. All professionals assigned shall work under the direction of FCMAT. All work shall be performed in accordance with the terms and conditions of this Agreement.

   FCMAT will notify the Client's county superintendent of schools of this Agreement.

2. <u>SCOPE OF THE WORK</u>

   A. <u>Scope and Objectives of the Study</u>

      1. Review the district's implementation of student success teams, response to instruction and intervention, and multitiered system of supports, and make recommendations for improvement, if any.

      2. Analyze special education teacher staffing ratios, class sizes and caseloads using statutory requirements for mandated services and statewide guidelines, and make recommendations for improvement, if any.

      3. Review the efficiency of staffing allocations of special education paraeducators, per Education Code requirements and/or industry standards, and make recommendations for improvement, if any. Review the procedures for identifying the need for paraeducators, including considerations related to the least restrictive environment and the processes for monitoring the assignment of paraeducators and determining the need for continued support from year to year (including classroom and 1-to-1 paraeducators).

      4. Analyze staffing and caseloads for related service providers, including but not limited to speech pathologists, psychologists, occupational/physical therapists, adapted physical education teachers and other staff who may be related service providers, and make recommendations for improvement, if any.

5. Determine whether the district overidentifies students for special education services compared to the statewide and countywide averages, and make recommendations for reducing overidentification, if needed.

6. Analyze whether the district provides a continuum of special education and related services for students in preschool through age 22, including their placement in the least restrictive environments, and make recommendations for improvement (which may include instructional models), if any.

7. Review the Special Education Department's organizational structure and staffing in the district's central office to determine whether its administration, clerical and administrative support, program specialists, teachers on special assignment and overall function are aligned with those of districts of comparable size and structure, and make recommendations for greater efficiencies, if any.

8. Review the district's nonpublic school and nonpublic agency placement processes, costs and placements, and make recommendations for improvements and cost efficiencies, if any.

9. Review the district's professional development/training program as it relates to special education, and make recommendations for improvement, if any.

10. Review the district's unrestricted general fund contribution to special education and make recommendations for greater efficiency, if any.

B. Services and Products to be Provided

1. Orientation Meeting
   The Team will conduct an orientation session at the Client's location to brief the Client's management and supervisory personnel on the Team's procedures and the purpose and schedule of the study. This orientation meeting is normally held at the beginning of fieldwork for the study.

2. Fieldwork
   The Team will conduct fieldwork at the Client's office and/or school site(s), or other locations as needed. Limited fieldwork may also be conducted remotely via telephone or videoconferencing services, in addition to the Public Safety Considerations outlined in Section 13 below.

3. Exit Meeting
   The Team will hold an exit meeting at the conclusion of the fieldwork to inform the Client of the status of the study. The exit meeting will include a review of the scope of work; outstanding items, including documents, data and interviews not yet received or held; and the estimated timeline for a draft report. The meeting will not memorialize details regarding findings because the Team's conclusions may change

after a complete analysis is finished. Exceptions to this will be findings of immediate health and safety concerns for students or staff, and other time-sensitive items that include the potential for risk or exposure to loss.

4. Exit Letter
   Approximately 10 business days after the exit meeting, the Team will issue an exit letter briefly memorializing the topics discussed in the exit meeting.

5. Draft Report
   An electronic copy of a preliminary draft report will be delivered to the Client's point of contact identified below for review and comment.

6. Final Report
   An electronic copy of the final report will be delivered to the Client's point of contact and to the Client's county superintendent of schools following completion of the study. FCMAT's work products are public and all final reports are published on the FCMAT website.

7. Board Presentation
   Presentations to the Client's board are optional and are made at the request of the Client. If a board presentation is requested, it will be noted in the scope and objectives of the study or can be added as a change in scope at a later date.

8. Follow-Up Review
   If requested by the Client within six to 12 months after completion of the study, FCMAT, at no additional cost, will assess the Client's progress in implementing the recommendations included in the report. This follow-up support is primarily a document review-based study. Progress in implementing the recommendations will be documented to the Client in a FCMAT management letter. FCMAT will work with the Client on a mutually convenient time to return for follow-up support that is no sooner than eight months and no later than 18 months after the date of the final report.

3. <u>PROJECT PERSONNEL</u>

The personnel assigned to the study will be led by a FCMAT staff person (job lead) and will include at least one other professional. FCMAT will notify the Client of the assigned personnel when the fully executed copy of this Agreement is returned to the Client.

FCMAT will communicate to the Client any changes in assigned project personnel.

4. <u>PROJECT COSTS</u>

The cost for studies requested pursuant to EC 42127.8(d)(1) and 84041 shall be as follows:

A. $1,200 per day for each FCMAT staff member while on site conducting fieldwork. The cost of independent FCMAT consultants will be billed at their daily rate for all work performed. On-site is defined as either 1) physically at the Client's office or school site(s), or 2) in a scheduled virtual meeting with the Client's personnel, representatives or others associated with the scope of work pursuant to Section 13 below.

B. All out-of-pocket expenses, including travel and its associated costs, and miscellaneous items necessary to complete the scope and objectives of the study.

C. The applicable indirect rate at the time work is performed on the study will be added to all costs billed.

D. The Client will be invoiced for 50% of the not-to-exceed cost shown below following completion of fieldwork (progress payment) and the remaining amount shall be due upon the issuance of the final report or presentation to the Client's board, whichever is later (final payment). The Parties agree that changes documented in a revised study agreement may change the original not-to-exceed amount shown below. If changes are made before or during fieldwork, the new not-to-exceed amount documented in such a revised study agreement will constitute the basis for the progress payment. If changes are made after fieldwork, 100% of the total changed value documented in a revised study agreement, less progress payments made, will constitute the final payment due. All payments shall be due immediately based on the terms of the invoice.

Based on the scope and objectives of the study, the total not-to-exceed cost of the study will be $23,000.

E. Any change to the scope of work will affect the total cost. Changes may include, but are not limited to, delays, revisions to the scope of services, and substitution or addition of personnel. The need for changes shall be communicated by FCMAT to the Client in advance in the form of a revised study agreement.

Payments for FCMAT's services are payable to Kern County Superintendent of Schools, Administrative Agent, 1300 17th Street, City Centre, Bakersfield, CA 93301.

5. <u>RESPONSIBILITIES OF THE CLIENT</u>

A. Return current organizational chart(s) that show the Client's management and staffing structure with the signed copy of this Agreement. Organizational charts should be relevant to the scope of this Agreement.

B. Provide private office or conference room space for the Team's use during fieldwork.

C. Provide for a Client employee to upload all requested documents and data to FCMAT's online SharePoint repository per FCMAT's instructions. Provide FCMAT with the name and email of the person who will be responsible for collecting and uploading documents requested by FCMAT with the signed copy of this Agreement.

D. Provide documents and data requested on the Team's initial and supplementary document request list(s) by the date requested.

All documents and data provided shall be responsive to FCMAT's request, in quality condition, readable and in a usable form. With few exceptions, documents and data requested are public records and records maintained by LEAs in the routine course of doing business. Some data requested may require exporting LEA financial system reports to Microsoft Excel or another usable format agreed to by FCMAT.

All documents shall be provided to FCMAT in electronic format, labeled as instructed by FCMAT. Upon approval of this Agreement, access will be provided to FCMAT's online SharePoint repository, to which the Client will upload all requested documents and data.

E. Ensure appropriate senior-level staff are available for the orientation and exit meetings.

F. Facilitate access to requested board members, officers and staff for interviews.

G. Facilitate access to requested information and facilities to include, but not be limited to, files, sites, classrooms and operational areas for observation.

H. Review a draft of the report and return it to FCMAT by the date FCMAT requests with any comments regarding the accuracy of the report's data or the practicability of its recommendations. The Team will review this feedback in a timely manner and make any adjustments it deems necessary before issuing the final report.

I. Return the requested evaluation survey to FCMAT as described below.

6. <u>PROJECT SCHEDULE</u>

Time is of the essence. The Parties acknowledge that the goal of the scope and objectives of the study under this Agreement is to produce a timely and thorough report that adds value for the Client. To accomplish this goal, the Parties agree to communicate and mutually agree to honor established time commitments. These commitments include the Client providing requested documents, setting and keeping interview appointments and returning comments on the draft report consistent with the established project schedule.

The following project schedule milestones will be established by FCMAT upon receipt of a signed Agreement from the Client:

ACTION	TIMELINE
FCMAT provides the Client with a draft Agreement.	Draft Agreements are usually provided within 20 business days of the Client's initial request for services.
Client returns partially executed Agreement to FCMAT along with the applicable organizational chart and the name and email of the of person who will be responsible for collecting and uploading documents requested by FCMAT.	Draft Agreements are valid for 30 business days.
FCMAT returns a fully executed Agreement to the Client and identifies the project schedule and the lead and other personnel assigned to the job.	Within five business days of the Client's return of the signed Agreement.

ACTION	TIMELINE
Client uploads initial requested documents and data to FCMAT's online SharePoint repository.	Within 10 business days of the Client's receipt of the FCMAT document and data request list.
Fieldwork	Mutually agreed upon; usually, to commence within 10 business days of FCMAT's receipt of requested documents and data.
Orientation meeting	First day of fieldwork.
Exit meeting	Last day of fieldwork.
Follow up fieldwork, if needed (e.g., rescheduled interview, additional interviews).	Mutually agreed upon; usually, within five business days of FCMAT's request.
Client uploads supplemental documents and data to FCMAT's online SharePoint repository.	Within two business days of the Client's receipt of FCMAT's supplemental document and data request(s).
Draft report submitted to the Client.	To be determined, usually, within eight weeks of the conclusion of fieldwork and receipt of all documents and data requested.
Client comments on draft report	Within 10 business days of FCMAT providing a draft report to the Client.

The Client acknowledges that project schedule deadlines build upon and are contingent on each previous deadline. Missed deadline dates will affect future deadline dates and ultimately the timing of the final report. For example, if the Client does not provide requested documents and data by the specified date, the fieldwork may not be able to proceed as originally planned.

FCMAT acknowledges that the Client has an educational program to administer, is balancing many priorities, and in some cases may have records management difficulties, staffing capacity issues, staff on various types of leave, or other circumstances, all of which will affect the project schedule.

The Parties commit to regular communication and updates about the study schedule and work progress. FCMAT may modify the usual timelines as needed.

7. COMMENCEMENT, TERMINATION AND COMPLETION OF WORK

FCMAT will commence work as soon as it has assembled an available and appropriate study team, taking into consideration other jobs FCMAT has previously undertaken, assignments from the state, and higher priority assignments due to fiscal distress. The Team will work expeditiously to complete its work and deliver its report, subject to the cooperation of the Client and any other related parties from which, in the Team's judgment, it must obtain information. Once the Team has completed its fieldwork, it will proceed to prepare a report.

In the absence of extraordinary circumstances, FCMAT will not withhold preparation, publication and distribution of a final report once fieldwork has been completed.

Prior to completion of fieldwork and upon written notice to FCMAT, the Client may terminate its request for service and will be responsible for all costs incurred by FCMAT to the date of termination under Section 4 (Project Costs). If the Client does not provide written notice of termination prior to completion of fieldwork, the Team will complete its work and deliver its final report and the Client will be responsible for the full costs.

FCMAT may terminate this Agreement at any time if the Client fails to cooperate with the requested project schedule, provide requested documents and data and/or make staff available for interviews as requested by FCMAT.

8. INDEPENDENT CONTRACTOR

FCMAT is an independent contractor and is not an employee or engaged in any manner with the Client. The manner in which FCMAT's services are rendered shall be within its sole control and discretion. FCMAT representatives are not authorized to speak for, represent, or obligate the Client in any manner without prior express written authorization from an officer of the Client.

9. RECORDS

The Client understands and agrees that FCMAT is a state agency and all FCMAT reports are public records and are published on the FCMAT website. Supporting documents and data in FCMAT's possession may also be public records and will be made available in accordance with the provisions of the California Public Records Act.

FCMAT has a records retention policy and practice, and every effort will be made to maintain records related to this Agreement in accordance with this policy.

10. CONTACT WITH PUPILS

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

11. INSURANCE

During the term of this Agreement, FCMAT shall maintain liability insurance of not less than $1 million unless otherwise agreed upon in writing by the Client, automobile liability insurance in the amount required by California state law, and workers' compensation as required by California state law. Upon the request of the Client and receipt of the signed Agreement, FCMAT shall provide certificates of insurance, with the Client named as additional insured, indicating applicable insurance coverages.

12. HOLD HARMLESS

FCMAT shall hold the Client, its board, officers, agents, and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of FCMAT's board, officers, agents and employees undertaken under this Agreement. Conversely, the Client shall hold FCMAT, its board, officers, agents, and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of the Client's board, officers, agents and employees undertaken under this Agreement.

13. **PUBLIC SAFETY CONSIDERATIONS**

Whether due to public health considerations, extreme weather conditions, road closures, other travel restrictions or interruptions, shelter-at-home orders, LEA closures or other related considerations, at FCMAT's sole discretion, the Scope of Work, Project Costs, Responsibilities of the Client, and Project Schedule (Sections 2, 4, 5 and 6 herein) and other provisions herein may be revised. Examples of such revisions may include, but not be limited to, the following:

A. Orientation and exit meetings, interviews and other information-gathering activities may be conducted remotely via telephone, videoconferencing, or other means. References to fieldwork shall be interpreted appropriately given the circumstances.

B. Activities performed remotely that are normally performed in the field shall be billed hourly as if performed in the field (excluding out-of-pocket costs that can otherwise be avoided).

C. The Client may be relieved of its duty to provide conference and other work area facilities for the Team.

14. **FORCE MAJEURE**

Neither party will be liable for any failure or delay in the performance of this Agreement due to causes beyond the reasonable control of the party, except for payment obligations by the Client.

15. **EVALUATION**

In the interest of continuous improvement, FCMAT will provide the Client with an evaluation survey at the conclusion of the services. FCMAT appreciates the Client's honest assessment of the Team's services and process. The Client shall return the evaluation survey within 10 business days of receipt.

16. **CLIENT CONTACT PERSON**

The Client's contact person designated below shall be the primary contact person for FCMAT to use in communicating with the Client on matters related to this Agreement. At any time when this Agreement or FCMAT's process requires that FCMAT send information, document request lists, draft report or final report, or when FCMAT makes other requests for the Client to act upon, this is the person whom FCMAT will contact. The Client may change the contact person upon written notice to FCMAT's job lead assigned to the study.

Name: Garrick Owen, Assistant Superintendent, Business Services

Telephone: (951) 940-6100

Email: gowen@valverde.edu

17. SIGNATURES

Each individual executing this Agreement on behalf of a party hereto represents and warrants that he or she is duly authorized by all necessary and appropriate action to execute this Agreement on behalf of such party and does so with full legal authority.

For Client:

Gordon Amerson (Nov 21, 2025 13:53:15 PST)

Gordon Amerson, Ed.D., Superintendent **Date**
Val Verde Unified School District

For FCMAT:

Michael H. Fine Digitally signed by Michael H. Fine
Date: 2025.11.30 19:31:19 -08'00'

Michael H. Fine, **Date**
Chief Executive Officer
Fiscal Crisis and Management Assistance Team