Annual Report 2016-17

Fiscal Crisis and Management Assistance Team
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http://www.ftmat.org
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Foreword

Thank you for your interest in California’s Fiscal Crisis and Management Assistance Team’s 2016-17 Annual Report. This report presents an overview of the activities of the FCMAT/CSIS organization for the past fiscal year. The Annual Report also gives the FCMAT/CSIS staff an opportunity to reflect on the accomplishments of the past year and establish services and priorities for the years ahead.

This past year was a year of transitions, and those will continue into 2017-18 as well. First and foremost to us as an organization, our longtime Chief Executive Officer Joel Montero retired on June 30. Joel had served California public education for 43 years as a teacher, administrator and superintendent. For the past 11 years, Joel served as FCMAT’s chief executive, with over 18 years in FCMAT in total. During that time Joel guided FCMAT to its current status as one of the premier organizations in the state that advise school districts, charter schools, county offices of education, community colleges and policy makers. We extend our sincere thanks to Joel for his leadership and wish him well.

The state of California is also in transition with regard to revenues and thus funding for schools. The massive effort to restore funding to schools lost during the great recession is almost complete. Year-over-year revenue gains to schools began to slow in 2016-17 and the trend will continue in the near term. While the economy remains strong, a downturn in the economic cycle is overdue, prompting conservative forecasts by the state. Transitional periods such as this create uncertainty for schools and community colleges, and uncertainty necessitates caution in forecasts and program growth.

Change is a constant in the fiscal and operational workings of California’s LEAs. In addition, planning for uncertain revenue levels generates needs in the LEAs we serve. One of the attributes of the FCMAT organization is that we can adjust quickly to new and ongoing needs of the field to determine how best to provide assistance. This is reflected in our professional learning programs and product development.

Our professional learning offerings continue to expand and evolve to meet current demands. Our product development does the same, with new and updated manuals and tools being made available to the field. One of the most exciting developments is the continued work on revamping our Budget Explorer multiyear financial projection application. The new Projection-Pro will be introduced later than our initial plan but will be rich in features and ease of use to help LEAs produce the necessary data to understand the future impact of current decisions. Likewise, as the year ended, FCMAT/CSIS was gearing up for a multiyear challenge of modernizing California’s K-12 budget, interim reporting and unaudited actual financial reporting tool known as the SACS software. This is another exciting project that is designed to bring technology current and better meet the needs of SACS users.

The support of the FCMAT board and our public- and private-sector partners is essential to the success of our endeavors. It is my honor to serve as FCMAT’s new chief executive officer and to work with a talent-rich staff to serve California’s schools.

Michael H. Fine
Chief Executive Officer
FCMAT Organization

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

FCMAT Agency

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

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

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

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

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

Administrative Agent

Dr. Mary Barlow was appointed as Kern County Superintendent of Schools (KCSOS) in 2017, after serving as associate superintendent for two years. She provides leadership for the county office operated programs as well as the divisions that support 47 Kern County school districts.

Mary attended Cerro Coso Community College at the Lake Isabella and Ridgecrest campuses before transferring as a junior to CSU Bakersfield where she earned her bachelor of arts in psychology in 1994. She went on to earn her multiple subjects teaching credential, a master's degree in educational management and an Ed.D. in organizational leadership from the University of LaVerne.

Mary has spent most of her career in education, serving as a teacher, director of children and family services, and superintendent. During her tenure as superintendent of the Kernville Union School District, the district was named a California Distinguished School, Title 1 Academic Excellence District and was recognized at the state level for its nutrition and wellness programs promoting student health.
She joined KCSOS in 2009 as the deputy administrative officer for FCMAT. In 2012, she was appointed as assistant superintendent of administration, finance & accountability for KCSOS.

Mary is a director with the California County Superintendents Educational Services Association, a director of the Association of California School Administrators (ACSA) Region XI and a member of the ACSA State Superintendency Council, and a director with the California School Boards Association Superintendency Council.

She is a member of numerous community organizations including the Kern County Juvenile Justice Coordinating Council, Kern County Treasurer and Tax Collector Advisory Committee, Kern County Emergency Management Citizens Advisory Board, Rotary Club of Bakersfield (board and youth services director), Downtown Business Association, Kern Economic Development Council, Kern County Network for Children, California Living Museum Foundation, Kern Public Services Financing Authority, and Kern Youth Empowerment Services. She is a past co-chair of the First Five Kern Commission.

**FCMAT Board**

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

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

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

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

FCMAT’s Mission

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

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

The Role of FCMAT

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

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

How FCMAT was Established

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

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

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**Fiscal Issues in California Education**

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

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

### Continuing Issues

#### State Teachers’ Retirement System and Public Employees’ Retirement System Contributions

Assembly Bill 1469 (Chapter 47, Statutes of 2014) increases the contribution rates that employers, employees and the state pay to support the State Teachers’ Retirement System (CalSTRS). The rate for employers is 14.43% for 2017-18. Employer rates will continue to increase until 2020-21 and had been expected to bring the underfunded retirement system to full funding in 31 years. However, despite the system reform measures passed in 2014, the unfunded liability has continued to increase.

With employer contributions growing to 19.1% in 2020-21, school agencies will have to readjust spending priorities annually to meet this new requirement. This comes at a time when school agencies are attempting to balance slower future revenue increases and implement a variety of new initiatives identified in their local control and accountability plans (LCAPs) designed to close the student achievement gap.

The rates below are advised for use in 2017-18 budgets and multiyear projections:

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<tr>
<td>Employer</td>
<td>8.25%</td>
<td>8.88%</td>
<td>10.73%</td>
<td>12.58%</td>
<td>14.43%</td>
<td>16.28%</td>
<td>18.13%</td>
<td>19.1%</td>
</tr>
<tr>
<td>Member (2% at 60)</td>
<td>8.00%</td>
<td>8.15%</td>
<td>9.20%</td>
<td>10.25%</td>
<td>10.25%</td>
<td>10.25%</td>
<td>10.25%</td>
<td>10.25%</td>
</tr>
<tr>
<td>Member (2% at 62)</td>
<td>8.00%</td>
<td>8.15%</td>
<td>8.56%</td>
<td>9.205%</td>
<td>9.205%</td>
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While currently less of a dollar impact, districts, county offices, community colleges and charter schools will also grapple with increasing rates for the Public Employees’ Retirement System (CalPERS). The CalPERS portfolio has performed poorly over multiple recent years, and missed its earnings benchmark used for actuarial purposes by large margins. However, as reported in mid-July, CalPERS’ preliminary return on investments for the just-completed 2016-17 fiscal year was 11.2%. This represents a significant turnaround for the agency’s investment returns but still leaves the long-term average rate of return below the assumed rate of 7%. At the same time, CalPERS is seeing pension outlays rise as its members retire in large numbers and claim benefits. LEAs will feel the impact of the lower investment returns and higher benefit payments through increased employer contribution rates.

CalSTRS rates may only be increased by the Legislature. However, the CalPERS board governs CalPERS rates. The most recent board action was in spring 2017, before the July earnings report was released. The rates below are advised for use in revising 2017-18 budgets and multiyear projections:
Some estimates indicate that about 25% of the Local Control Funding Formula (LCFF) restoration funding will go to retirement programs. This percentage will vary by LEA, with some LEAs experiencing a much higher percentage of their funding being committed to CalSTRS and CalPERS. The effect of the CalSTRS and CalPERS statutory benefits and their associated dollar increases will fiscally challenge LEAs in the coming years as growth in Proposition 98 will be inadequate to offset the total new cost of employer contributions.

Qualified and Negative Certifications (LEA Solvency)

The number of districts that certified qualified for the second interim reporting period of 2016-17 reflected an increase in the respective numbers for the same period of 2015-16. This increase was to be expected during a period of transition from funding expansion to a period of level funding. The number of qualified certifications is directly related to the state budget, whereas the number of negative certifications (which has been flat over the years) is influenced by a variety of long-term issues in a district.

Perhaps as much as 20% of all school districts deficit spent during 2016-17, and that is not expected to change significantly for 2017-18. The number of districts seeking counsel from FCMAT due to deficit spending patterns is increasing, especially those with lower unduplicated student counts and thus a higher dependence on the base grant. Increases in revenue from the LCFF will not completely mitigate potential solvency issues in school districts as they align LCAPs with resources and account for slowing revenue growth and experience increases in fixed expenses that are not tied to improved or expanded services, declining reserves, impacts from collective bargaining settlements and declining enrollment.

The Shrinking Pool of Qualified Teachers and Chief Business Officials

Research consistently shows that the most important factor influencing student achievement is a qualified teacher facilitating the learning. California has a significant shortage of qualified teachers. This is unchanged from the past couple of years, and projections continue to indicate that the shortage will increase in the short term. In April 2017, the Learning Policy Institute reported that the number of students enrolling in U.S. teacher preparation programs had declined by 35% since 2009. The number for California is a staggering 70%. Mitigating the shortage and ultimately changing the trend requires a longer-term solution. The short-term solutions will impact LEAs’ budgets through accelerated salary placements, higher paid substitutes, professional development costs and more aggressive compensation settlements that are designed to make an LEA more competitive and attractive.

The employment pool of experienced, qualified chief business officials (CBOs) is critically thin in California, and retirements from these jobs remain high due to the aging of the workforce. There are many smart and interested candidates for CBO roles, but broad experience is a key missing element. Programs that are intended to prepare new CBOs cannot keep pace with the current need, much less the requirements of the future. The fiscal health of LEAs depends on skilled business officials and a system to support their training and preparation. Absent that, the risk of fiscal distress and the potential of insolvency increase.
Emerging Issues

Transition Period

School funding is in the midst of a transition period. Transition years create anxiety around uncertainties. General economic indicators continue to be strong well past the traditional point of recovery in the economic cycle.

Despite continued growth, significant risks are looming and LEAs should approach their multiyear planning conservatively. The transition clearly began this past fiscal year with projections around state revenue changing between adopted budget, the Governor’s January proposal, May Revision and the final budget. It is becoming increasingly clear that the recent Proposition 98 boom years are over and the best year for revenue growth is no longer in front of us, but has passed.

The 2017-18 fiscal year continues the state’s investment in the LCFF by closing the remaining gap to target by 43.19%. In aggregate, the initial adjusted LCFF gap has been closed by roughly 97%. The forecasts for the next two years use even larger percentages applied to the shrinking remaining gap.

While the percentages themselves are important, far more important are the forecasted dollar values behind them. These high percentage values are misleading to community members and many local policy makers. The dollar value behind the gap closure percentage is essentially flat. Small cost of living adjustment (COLA) projections add to the dilemma. The LCFF target is adjusted annually by COLA, and small COLAs mean a diminished target and thus a smaller gap to be filled.

While very unlikely to reflect year-over-year negative growth in the near term, weaker state revenues will influence the amount of funds ultimately dedicated to the gap closure and the full implementation of LCFF.

In very simple terms, revenue growth at the local level will be outpaced by expenditure growth. Expenditure growth will be driven by external variables that the LEA has little control over. These include the aforementioned impacts of the CalSTRS and CalPERS employer contribution rate increases, automatic step and column salary increases, health care cost increases where hard caps don’t exist, the final stage costs of reducing transitional kindergarten through third grade class sizes to 24:1, higher contributions to special education and impacts from declining enrollments that continue to plague many districts.

The chart on the next page graphically demonstrates this dilemma using only CalSTRS, CalPERS, step and column and special education impacts. Expenditures outpace revenues in the current year plus both out-years.
Multiyear projections often take a back seat during periods of economic expansion. Now is the time for business offices to reinvest in the time and details it takes to prepare meaningful multiyear financial projections (MYFP). It is also time for LEAs’ executive management and policy makers to pay attention to the MYFP and how their decisions affect the MYFP model. Equally important, now is not the time to bow to pressure to reduce reserves, but instead invest in prudent reserve planning efforts to help mitigate the revenue/expenditure mismatch in the short term.

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

**New Accountability System Relies on Data**

All elements of the state’s new accountability system depend on quality data, leading FCMAT to repeat its reminder that emphasis on data quality has never been more important. It drives LEA funding and the discussion surrounding LEA performance more than ever before.

**Transition in State Administration**

There is little debate that the single most influential champion of the LCFF is Governor Jerry Brown. The apparent candidates to replace the governor in the 2018 election have not been clear where they stand with the current system. We know the Legislature has a number of concerns, as do influential social justice groups. The State Board of Education has been attentive to input received from the field on the LCFF and LCAP template and regulations governing the new system. Because they are all gubernatorial appointees, a change in administration will set the stage for new members whose philosophies may be different. The potential for change in the LCFF and LCAP post-Governor Brown is real and adds to the uncertainty as we look at out-year funding commitments.
FCMAT Strategic Plan

The 2013-14 State Budget Act included the Local Control Funding Formula (LCFF), which significantly changed the way LEAs are funded. The LCFF replaced revenue limits and most state categorical program funding with grade span adjusted base grants and supplemental and concentration grants determined by the number of unduplicated students who are English learners, foster youth, and/or eligible for free or reduced-price meals. The state anticipates it will take eight years to fully implement the LCFF.

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

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

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

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

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

1. Improve student growth, achievement and accountability
2. Maximize service to clients and improve access to resources
3. Maintain a cohesive, productive and stable workforce
4. Maintain fiscal stability, integrity and accountability
5. Provide responsive leadership as a community partner
The following FCMAT objectives and action steps that support the goals were presented to KCSOS in June 2015:

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

Action Steps:
- Develop and implement Microsoft SharePoint Office 365 to improve staff productivity and efficiency.
- Develop specifications and a request for proposals to update Budget Explorer MYFP software and provide access to all K-12 local educational agencies.
- Update or replace the Job Management System (JMS) to meet current needs.

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

Action Steps:
- Obtain input from staff regarding potential changes to the comprehensive review process.
- Provide information to the state administration and FCMAT board regarding potential changes to the comprehensive review process.
- Obtain input from staff regarding necessary changes to the comprehensive review standards.
- Provide information to the state administration and FCMAT board regarding potential changes to the comprehensive review standards.

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

Action Steps:
- Make decisions about FCMAT’s professional development offerings through needs assessments, feedback and evaluations.
- Encourage broad-based ownership of professional development by involving all FCMAT staff in both internal and external trainings.
- Integrate additional professional development opportunities into FCMAT’s structure by including responsive trainings as the needs of our staff and LEAs continue to evolve.
- Partner with outside agencies whenever possible to offer professional development in a way to expand our audience.
Fiscal Crisis and Management Assistance Team

FCMAT Appropriations for Fiscal Year 2016-17

<table>
<thead>
<tr>
<th>FCMAT Appropriations</th>
<th>$4,123,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>FCMAT Flow-Through</td>
<td>$802,000</td>
</tr>
</tbody>
</table>

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

Partnership with the Educational Community

FCMAT provides proactive and preventative management assistance to districts, county offices, charter schools and community colleges in managing their operations. Management assistance requests from these entities represented approximately 88% of FCMAT’s fieldwork in 2016-17. Additionally, the state Legislature and county superintendents of schools can assign FCMAT into a local educational agency (LEA). These assignments are typically for fiscal crisis intervention and AB 139 (fraud audit) work and represented approximately 12% of FCMAT’s studies in 2016-17. FCMAT’s primary charge with these assignments is to avert emergency state loans. Legislation in 2006 made FCMAT services available to charter schools and community colleges, expanding FCMAT’s role in providing assistance to local educational agencies, K-14.

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

During 2016-17 FCMAT handled 83 fiscal crisis intervention or management assistance reviews (including two comprehensive assessments) for districts, county offices, charter schools and community colleges throughout the state. This number includes the AB 139 studies conducted during the fiscal year. The types of reviews performed in each of 11 major categories in the 2016-17 fiscal year is shown on page 27.

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

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

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

Interim Financial Report Certifications

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

The interim reports must include a certification of whether or not the LEA is able to meet its financial obligations. These certifications are classified as positive, qualified, or negative. A positive certification indicates that the district will meet its financial obligations for the current and two subsequent fiscal years. A qualified certification is assigned when the district may not meet its financial obligations for the current or two subsequent fiscal years. A negative certification signifies that the district will be unable to meet its financial obligations for the remainder of the current year or for the subsequent fiscal year.
As indicated in the chart on the following page, qualified certifications more than doubled in the first reporting period for 2016-17. During the second reporting period, 10 more LEAs were added, for a total of 41 qualified certifications. Negative certifications increased from two in the second reporting period in 2015-16 to three in the first reporting period in 2016-17, and then decreased to two in the second reporting period.

FCMAT has monitored interim certification status since its inception, and will continue to do so as an integral part of its efforts to assist LEAs in preserving their fiscal stability.
Certifications of Financial Reports
California School Districts – 2003 to Present

Education Code Section 42130 (Reports by District Superintendents)
1st Interim covers period ending October 31st and Board approved by December 15th
2nd Interim covers period ending January 31st and Board approved by March 16th
3rd Interim covers period ending April 30th and filed by June 1st (required if 2nd Interim is Qualified or Negative)

Positive Certification: Shall be assigned to any school district that, based upon current projections, will meet its financial obligations for the current fiscal year and subsequent two fiscal years.

Qualified Certification: Shall be assigned to any school district that, based upon current projections, may not meet its financial obligations for the current fiscal year or two subsequent fiscal years.

Negative Certification: Shall be assigned to any school district that, based upon current projections, will be unable to meet its financial obligations for the remainder of the fiscal year or the subsequent fiscal year.

Projected results are based on an informal survey of educational agencies.

Fiscal Crisis & Management Assistance Team 8/17/17
Professional and Product Development

FCMAT’s professional development offerings continue to expand in support of FCMAT’s mission to help California’s local educational agencies fulfill their financial and management responsibilities by providing fiscal advice, management assistance, training and other related school business services. During 2016-17, FCMAT continued to focus on providing a variety of professional development opportunities and products, with the overreaching goal to keep pace with the changes that new and long-term colleagues face in education finance. Professional development includes individual workshops, leadership preparation, written resources and product development. FCMAT staff provide and develop most of the opportunities, but FCMAT also partners with other education agencies when doing so would benefit the field.

Although FCMAT receives an annual state appropriation of $1,137,000 for professional development, additional staff and financial resources have been allocated specifically to this area as FCMAT continues to provide responsive leadership and guidance to the field. Most of FCMAT’s workshops are provided at no charge; however, a nominal fee is charged at specific workshops to ensure all costs are covered. Product development and written resources are provided at no charge, with few exceptions.

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

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

Professional Development Utilizing FCMAT Staff

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

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

- Associated Student Body (ASB)
- LCFF/LCAP Mastering the Basics
- LCFF/LCAP Beyond the Basics
- LCFF/LCAP and the MYP
- Charter Schools: Managing Challenges and Becoming Champions
- Why Data Matters
Professional Development Partnering with Outside Agencies

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

- California County Superintendents Educational Services Association (CCSESA) and the Business and Administration Steering Committee (BASC): Annual and AB 1200 conferences
- California Charter Schools Association (CCSA): Data Management workshops, including information on LCFF, LCAP, CalPADS and Ed-Data
- California Association of Directors of Activities (CADA): Associated Student Body Training
- School Services of California (SSC): May Revision and Unraveling the Mysteries of School Finance for Administrators workshops
- California Association of School Business Officials (CASBO): Accounts Payable and CBO Boot Camp workshops
- ASBWorks: Associated Student Body Training
- Charter Authorizers Regional Support Network (CARSNet): Charter Oversight workshops

Leadership Preparation

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

Most FCMAT staff members are involved with the CBO Mentor Program and USC’s School Business Management Certificate Program in some manner, whether as curriculum leaders, presenters or facilitators. FCMAT also became involved with CASBO’s CBO Partner Training Program during 2016-17. Enrollment in these programs is always at capacity, and they are essential to providing California’s LEAs with skilled personnel who can lead business operations in a county office, K-12 school district or charter organization.

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

- FCMAT’s CBO Mentor Program
- University of Southern California (USC) School Business Management Certificate
- California Association of School Business Officials (CASBO) CBO Partner Training Program
- Coalition of Adequate School Housing (CASH) School Facilities Leadership Academy
- California Educational Technology Professionals Association, Chief Technology Officer Mentor Program
- Association of California School Administrators (ACSA) School Business Academy
**Written Resources**

FCMAT continues to maintain, update and add to its library of written resources and tools that help expand overall knowledge as well as provide guidance on legal issues and best practices. These include the following:

- Associated Student Body Accounting Manual, Fraud Prevention Guide and Desk Reference
- Fiscal Procedural Manual for Business Officials in California County Offices of Education
- Fiscal Oversight Guide
- The Common Message
- Fiscal Alerts
- Charter School Annual Oversight Checklist
- Fiscal Health Risk Analysis, K-12
- Fiscal Health Risk Analysis, Community College
- Charter School Accounting Manual and Best Practices (to be released fall 2017)
- Indicators of Risk or Potential Insolvency, K-12
- Indicators of Risk or Potential Insolvency, Community College

**Certificated Salaries and Benefits Project (J-90)**

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

**Product Development**

**Local Control Funding Formula and the LCFF Calculator**

In October 2013 FCMAT partnered with members of the Business and Administration Steering Committee to help guide the educational community in estimating state funding under the governor’s new Local Control Funding Formula (LCFF), which became effective July 1, 2013. The 2016-17 fiscal year did not yield many significant statutory changes to the LCFF, and FCMAT continued to update the LCFF Calculator with current assumptions and historical data necessary for future projections. Additionally, the calculator was expanded to project through 2024-25, to support a five-year projection.
throughout the estimated eight-year LCFF implementation period. It also was updated to identify basic aid status in school districts and project the percentage to increase or improve services to unduplicated pupils beyond the LCFF transition period.

With the extension of the Education Protection Account (EPA), the calculator was updated to estimate EPA funding on an ongoing basis. It can now separately identify the value of EPA funding that is used to calculate LCFF revenues and the value an LEA will receipt in a given fiscal year. This modification will allow LEAs to better estimate LCFF revenues while more easily identifying the value of EPA to budget locally.

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

**Budget Explorer and Projection-Pro**

FCMAT continues to support Budget Explorer by providing updated assumptions and task-specific instructions to create reliable multiyear projections, especially in the area of increasing retirement costs.

In 2016-17, FCMAT began developing Projection-Pro, updated multiyear and cash flow projection software. Great progress has been made in expanding functionality beyond Budget Explorer’s capabilities in the areas of revenues, salaries and staffing, one-time revenue and expenditure adjustments, and other components of a solvent budget. Early plans were to integrate the LCFF Calculator and LCAP in the initial release of Projection-Pro. After much consideration and planning, these components will likely be released for full statewide implementation of the LCFF. The new software has been designed for use by charter schools, charter management organizations, school districts and county offices of education.

FCMAT expects to field test the Projection-Pro application in spring/summer 2018 and release it for use as soon as field testing and any required revisions are made and tested. The anticipated release date is approximately July 1, 2018.
### Types of Reviews for Fiscal Year 2016-17

<table>
<thead>
<tr>
<th></th>
<th>Number</th>
</tr>
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<tbody>
<tr>
<td>AB 139</td>
<td>10</td>
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<tr>
<td>Community College</td>
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<tr>
<td>Comprehensive</td>
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<td>Facilities/M &amp; O/Transp.</td>
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<td>Fiscal/Business</td>
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<td>Food Services</td>
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<tr>
<td>Organization/Staffing</td>
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<tr>
<td>Special Education</td>
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<tr>
<td>Special Ed. incl. Transportation</td>
<td>3</td>
</tr>
<tr>
<td>Technology</td>
<td>9</td>
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</table>

*Total Studies includes all FCMAT studies of any type that have been active at any time during the fiscal year. This number does not include professional development workshops or other FCMAT assignments that do not constitute studies conducted for an LEA.*
FCMAT Trend Analysis

As in previous years, a significant portion of FCMAT’s work in 2016-17 continued to focus on business and fiscal issues. This included work such as processes and procedures for budget development and monitoring, multiyear financial projections, cash flow analysis, fiscal health risk analysis and AB 139 extraordinary audits. There was a substantial increase in the number of studies from 62 in 2015-16 to 83 in 2016-17.

A review of this fiscal year shows an increase in the number of AB 139 extraordinary audits, community college reviews and on-site assistance. The AB 139 extraordinary audits increased from six the previous year to 10 in 2016-17, with more than half the work focused in charter schools. Community college work increased from one the previous year to six in 2016-17. Almost all of this work centered on business and fiscal issues, with half being initiated by request from the California Community Colleges Chancellor’s Office.

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

Based on recent trends, another of FCMAT’s priorities will be a continued focus on fiscal issues affecting school districts, county offices, charter schools, and community colleges; multiyear financial projections; cash flow analysis; budget development and monitoring; AB 139 extraordinary audits; fiscal health risk analysis; and professional and product development.

Examples of FCMAT’s statewide work include the development of Projection Pro: software capable of multiyear financial and cash flow projections. This software is targeted to be released in July 2018. FCMAT continues to maintain the LCFF Calculator, Calculator Caveats, LCFF Listserv subscription, LCFF and ASB Online Help Desks, CALPADS Reports and LCFF Self-Paced Training links.

During 2016-17, FCMAT staff provided a variety of professional development workshops statewide in a number of areas. These offerings were provided in response to specific requests from the field as well as staff continuing to monitor the needs of the education community.

The 2016-17 offerings included 17 regional workshops. Eight were focused on LCFF and LCAP, four specifically targeting the LCFF/LCAP basics and four on more advanced LCFF/LCAP topics, which also included Ed-Data information. All of these workshops were developed to assist K-12 LEAs in understanding the relationship between the LCFF and LCAP, how to use the LCFF calculator, an overview of the LCAP template, process and timeline, and generating a locally meaningful LCAP.

The other nine regional workshops concentrated on charter schools: five on charter school oversight, which included the processes, requirements, timelines, best practices and other considerations to help charter school petitioners and their potential authorizers establish successful partnerships. Four workshops focused on better understanding the different types of data used to represent who students are, how our charter schools are performing, how funding is driven, how decisions are impacted, and where the information comes from.

Additional trainings included 37 ASB workshops on how to legally account for these funds while maintaining fiscal accountability, legal compliance, transparency and accuracy; three workshops specifically designed for superintendents and top administrators to assist in their understanding of the critical aspects of an LEAs finances to improve policy decisions; eight workshops (four on fiscal oversight...
and four on accounting/auditing) as part of a CBO Partner Training Program in a multiweek series; five workshops on the accounts payable process, including budget, internal controls and public (vendor) relations; and a variety of presentations around the state in numerous K-14 venues on the many fiscal topics that FCMAT staff encounter daily.

FCMAT will continue to focus on offering a variety of professional development subjects and programs in the 2017-18 fiscal year, and will expand its offerings based on the needs of the field as well as current requirements in K-14 education.
Technical Support

FCMAT Help Desk

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

Overall, ticket submissions have decreased compared to prior years. The primary requested areas continue to be Associated Student Body (ASB) and the Local Control Funding Formula/Local Control & Accountability Plan (LCFF/LCAP). Decreased requests are likely the result of FCMAT’s ongoing commitment to providing professional development locally across the state in these major topics. Requests in the area of “Other” pertained to a wide range of topics, such as support for FCMAT listserves, Education Code reference requests, and local policy best practice questions.

FCMAT responded to a total of 599 questions submitted through the online help desk during the 2016-17 fiscal year. A five-year history of FCMAT help desk activity is provided in the table below.

<table>
<thead>
<tr>
<th>Topic</th>
<th># Questions 2012-13</th>
<th># Questions 2013-14</th>
<th># Questions 2014-15</th>
<th># Questions 2015-16</th>
<th># Questions 2016-17</th>
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<tr>
<td>ASB Organizations &amp; Booster Clubs</td>
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<td>Other</td>
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<td>School Business-CBO / General</td>
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<td>Total</td>
<td>367</td>
<td>850</td>
<td>753</td>
<td>804</td>
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* Support requests were not managed and tracked through the Numara help desk system.
Listserves

FCMAT maintains confidential listserves for various job-alike groups. These listserves are a vital communication link between professional colleagues and are a fast, free, and secure method for sharing information. K-12 professionals may connect with their colleagues throughout the state to share documents and obtain relevant and timely information.

FCMAT maintains these active job-alike listserves:

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

FCMAT hosts several other specialty listserves, such as Budget Explorer user group, Budget Explorer Announcements, LCFF Calculator Announcements, two LCFF Calculator testing groups, CSIS listserve, and the K-14 News Headlines.

FCMAT Website

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

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

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

Education Audit Appeals Panel

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

Chief Executive Officer
Michael Fine

Chief Operations Officer
Nancy Sullivan

Deputy Operations Officer
Amy Fong
Gary Jones

Officer, Info Systems
Vacant

Officer, Requirements
Rima Mendez

Officer, Client Services
Martha Friedrich

Field Support Specialist (4)
Implement Specialist
Services Architect
Requirements Architect

Admin Secretary
Techn Svcs Manager
Systems Architect
Officer, Information Systems
Vacant

Student Assistant
Network Sys Specialist (2)
Database Prog/Analyst (2)
Usability Desgr/Engineer
Programmer/Analyst (6)

Database Specialist
Testing Analyst (4)
Testing Specialist (3)
Client Support Technician (2)
Data Analyst (3)

Business Analyst (3.5)

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CSIS Strategic Plan

CSIS continues to focus on improving the California Longitudinal Pupil Achievement Data System (CALPADS) and increasing access to and use of high-quality data. CALPADS grows in importance each year. In 2016-17 the California Department of Education released the initial version of the California School Dashboard. CALPADS data are used to calculate performance on the following state indicators:

- Four-year cohort graduation rate
- Academic performance
- Suspension rate
- English learner progress
- College/career indicator
- Chronic absenteeism

In addition, CALPADS data are used to calculate each dashboard student group (race/ethnicity, English learners, foster youth, homeless, socioeconomically disadvantaged and students with disabilities).

The CDE continues to expand CALPADS to include additional data and data collections consistent with the original intent of CALPADS. FCMAT/CSIS fully supports the CDE’s efforts to reduce redundant data collections and leverage the use of CALPADS data. Work is underway to transition the Special Education system, CASEMIS, to CALPADS over the coming years.

The Ed-Data website (http://ed-data.org) makes data from CALPADS and other sources accessible to the public and available for use in planning and decision making.

Strategic CALPADS activities for FCMAT/CSIS included:

- Providing training and assistance to LEAs on CALPADS submissions and good data management practices.
- Completing requirements, development, database maintenance and support, testing and configuration/deployment tasks associated with implementing enhancements and resolving identified defects in CALPADS per direction set by the CDE. In 2016-17, this work included implementing the collection of chronic absence data in CALPADS and improvements in reports and validations to help LEAs submit and certify accurate data for accountability and reporting.
- In collaboration with the CDE, continuing to improve the processes used to support and maintain CALPADS.

In 2016-17, FCMAT/CSIS supported LEAs in completing the CALPADS submissions listed below. These submissions require LEA staff time to upload the data, resolve errors, verify reports and certify the data.
<table>
<thead>
<tr>
<th>Submission Name</th>
<th>Data Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 1</td>
<td>Student enrollment, graduates, dropouts, English Language Acquisition Status, immigrant counts, eligibility for free or reduced price meals (FRPM), foster youth and unduplicated count of students who are FRPM eligible, English Learners and/or foster youth</td>
</tr>
<tr>
<td>Fall 2</td>
<td>Student course enrollment, staff assignments and full-time equivalents and English Learner services</td>
</tr>
<tr>
<td>End of Year 1</td>
<td>Course completion and career technical education participants, concentrators and completers</td>
</tr>
<tr>
<td>End of Year 2</td>
<td>Program eligibility/participation and homeless students</td>
</tr>
<tr>
<td>End of Year 3</td>
<td>Student discipline, student absence summary and cumulative enrollment</td>
</tr>
</tbody>
</table>

FCMAT/CSIS’ Ed-Data work leverages the data collected in CALPADS as well as other data collected by the CDE to provide educators, policymakers, the Legislature, parents, and the public quick access to timely and comprehensive data about K-12 education in California. Strategic activities for Ed-Data in 2016-17 included:

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

Along with FCMAT, CSIS participated in the Kern County Superintendent of Schools (KCSOS) 2015-2018 strategic planning process. CSIS developed objectives and action steps to support KCSOS goals. The KCSOS goals as well as CSIS objectives, action steps and a summary of work completed by action step in 2016-17 are:

**KCSOS Goal: Improve student growth and achievement & accountability**

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

CSIS Action Steps:

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

Summary of Work Completed in 2016-17:

Action step 1: In 2016-17, FCMAT/CSIS assisted CDE in analyzing the data in CALPADS and determining the changes needed in CALPADS to 1) support the California School Dashboard and 2) ensure accurate data for accountability, the Local Control Funding Formula (LCFF) and other state and federal reporting. Changes in CALPADS in 2016-17 included:

- Adding the collection of chronic absenteeism data for schools, including adding a new file format for absence summary data, changing the user interface, adding numerous validations, and creating new snapshot reports for the CALPADS End of Year submission,
• Adding cumulative enrollment reports that will be used to calculate school and district suspension and expulsion rates as well as chronic absenteeism rates,
• Collection of Golden State Seal Merit Diploma and State Seal of Biliteracy data,
• Adding a new Age Eligibility filter to Reports 1.19 – COE LCFF – Count and 1.20 – COE LCFF – Detail to provide county office LEA counts of students used in LCFF funding calculations and to match total enrollment counts from Report 1.17 – LCFF – Count and Report 1.18 – LCFF – Detail,
• Modifying all LCFF related reports to count free and reduced-price program records that start between 7/1 and 10/31 for LCFF purposes,
• Discontinuing collecting Highly Qualified Teacher (HQT) and NCLB Core Instructional Level data based on ESSA requirements,
• Expanding direct certification for free/reduced price meals to include Medi-Cal participants,
• Modifying course codes used for reporting of career technical education to CALPADS and applying more stringent validations for CTE Concentrators and Completers to improve the quality of college and career data in CALPADS, and
• Adding more validations for data integrity.

FCMAT/CSIS also continued work to transition Special Education reporting to CALPADS to improve the quality of data used for federal reporting. CALPADS became the official source for the collection and reporting of the special education discipline data in May 2016, and the transition of Special Education reporting into CALPADS will continue through approximately 2019-20.

Action step 2: FCMAT/CSIS worked with EdSource and CDE to plan for adding California Assessment of Student Performance and Progress (CAASPP) data into the Ed-Data site. FCMAT/CSIS and EdSource held four focus groups to gather input from a variety of stakeholders including teachers, principals, district and county office administrators, parents, advocates, and policy makers. Design work continued into 2017-18. FCMAT/CSIS plans to add the CAASPP graphs to Ed-Data in the 2017-18 year.

Action step 3: FCMAT/CSIS continues to support LEAs in reconciling their accountability data and using data locally. For example, in 2016-17, FCMAT/CSIS helped LEAs reconcile their CALPADS data with the CDE’s private preview of cohort graduate and dropout data. As necessary, FCMAT/CSIS helped LEAs identify how to correct errors in data they submitted to CALPADS and how to improve local practices to improve data accuracy and timeliness.

KCSOS Goal: Maximize service to clients and improve access to resources

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

CSIS Action Steps:
1. Increase the number of CALPADS trainings that stress the relationship between errors and data quality.
2. Increase the number of five-year trend charts on the Ed-Data website.
3. Decrease the average wait time for CALPADS snapshot reports.
4. Increase the percentage of LEAs and/or CALPADS administrators receiving CALPADS recognitions.
Summary of Work Completed in 2016-17:

Action step 1: In 2016-17, FCMAT/CSIS continued to stress the relationship between errors and data quality in its regular course offerings and in question and answer sessions. FCMAT/CSIS created a new course, Guide to Troubleshooting CALPADS Errors, to assist LEAs in learning how to resolve various validation errors. FCMAT/CSIS began training LEAs on the connection between CALPADS and the California School Dashboard and the need for accurate data in CALPADS to feed into the Dashboard.

Action step 2: In 2016-17, FCMAT/CSIS increased the number of five-year trend graphs by adding a new graph to the Financial Data tab that displays the ratio of unrestricted salary/benefits to unrestricted expenditures over five years. FCMAT/CSIS also completed planning and design work so that graphs of CAASPP data for English-language arts/literacy and mathematics could be added in 2017-18.

Action step 3: In 2015-16, the snapshot redesign project was implemented to streamline the nightly processes so they did not exceed the eight-hour window; ensure CALPADS was available to LEAs during the posted hours of operation; and decrease the wait time for LEAs to access their reports, ideally making them available the same day LEAs made changes. Although the generation of snapshot reports is not always completed as quickly as originally envisioned, the snapshot redesign successfully reduced the time required for the nightly processes and increased CALPADS availability to comply with posted hours of operation.

Action step 4: In October 2015, 296 individuals received the 2014-15 Training Recognition award. In August 2017, 376 individuals received the 2016-17 Training Recognition, an increase of 80 individuals.

KCSOS Goal: Provide responsive leadership as a community partner

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

CSIS Action Steps:

1. Engage CCSESA’s Technology and Telecommunications Steering Committee (TTSC) in discussions to increase awareness and effective use of CALPADS and Ed-Data.

2. Support the CTO Mentor Program in its efforts to train current and future chief technology officers.

3. Promote increased awareness of the role of CALPADS and Ed-Data in accountability, improved student achievement and closing the achievement gap.

Summary of Work Completed in 2016-17:

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

Action step 2: Two FCMAT/CSIS representatives contributed to the Steering Committee for the CTO Mentor Program throughout the fiscal year and participated in the subgroup of members who scored student portfolios. The CSIS chief operations officer was one of two trainers for the CTO Mentor Kickoff in February 2017.

Action step 3: FCMAT/CSIS promoted the role of CALPADS and Ed-Data accountability, improved student achievement and closing the achievement gap in charter school workshops, LCAP workshops, CCSESA workshops, and professional development workshops in county offices of education.
CSIS Appropriations for Fiscal Year 2016-17

<table>
<thead>
<tr>
<th>Appropriations</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSIS Operations</td>
<td>$5,808,000</td>
</tr>
<tr>
<td>Ed-Data Partnership</td>
<td>$374,000</td>
</tr>
</tbody>
</table>
CSIS Training

CALPADS

In fiscal year 2016-17, FCMAT/CSIS training efforts continued to focus on the California Longitudinal Pupil Achievement Data System (CALPADS). The overarching goal was to help LEAs collect, maintain, certify and use high-quality data.

FCMAT/CSIS trained LEAs through 22 different online and data management classes, including basic data management training for new LEA CALPADS administrators and advanced trainings for experienced administrators. In addition, FCMAT/CSIS provided 20 different self-paced trainings. FCMAT/CSIS updated the submission-based online and self-paced trainings as necessary during the year to ensure the content remained current.

The full catalog of FCMAT/CSIS trainings, including course descriptions and target audience, is available from https://csis.fcmat.org/Pages/Course-Catalog.aspx. In 2016-17, FCMAT/CSIS added three courses for LEAs and student information system vendors to introduce the Student Absence Summary data collection and new file format. To help LEAs better navigate the catalog of CALPADS resource material and master the validation resolution process, FCMAT/CSIS added the Guide to CALPADS Documentation and the Guide to Troubleshooting CALPADS Errors courses.

FCMAT/CSIS also provided face-to-face trainings on CALPADS data and data management at six county offices of education and participated in two student information system vendor user conferences. These presentations were in response to county offices of education requests for more information on CALPADS and details regarding the Local Control Funding Formula reporting requirements. These onsite trainings covered content from the K12 Educational Data Management and K12 State Reporting Overview for Administrators courses.

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

The CDE and FCMAT/CSIS also hosted two CDE-CSIS CALPADS Information Meetings during the fiscal year, with 527 individuals registered for the October meeting and 908 registered for the April session. CDE and FCMAT/CSIS staff shared the responsibility for presenting and responding to questions. FCMAT/CSIS also posted meeting materials of the October and April sessions on the FCMAT/CSIS website so those who could not attend could obtain the content.

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

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

The Ed-Data website, found at http://ed-data.org, is operated through a partnership of the California Department of Education (CDE), EdSource, and FCMAT/CSIS. CSIS hosts and maintains the site. Ed-Data provides educators, policymakers, the Legislature, parents, and the public quick access to timely and comprehensive data about K-12 education in California.

In the 2016-17 year, Ed-Data completed the following five releases:

<table>
<thead>
<tr>
<th>Date</th>
<th>Data Released</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 4, 2016</td>
<td>• 2014-15 cohort graduation and dropout data</td>
</tr>
<tr>
<td></td>
<td>• 2014-15 12th grade graduates meeting UC/CSU course requirements</td>
</tr>
<tr>
<td></td>
<td>• 2014-15 class size data</td>
</tr>
<tr>
<td></td>
<td>• Added new race/ethnicity filters in comparisons for the graduation/dropout data</td>
</tr>
<tr>
<td>November 7, 2016</td>
<td>2013-14 &amp; 2014-15 ACT/SAT/AP release</td>
</tr>
<tr>
<td>December 22, 2016</td>
<td>2015-16 student demographics release</td>
</tr>
<tr>
<td>January 26, 2017</td>
<td>2015-16 teacher salary data release</td>
</tr>
<tr>
<td>March 13, 2017</td>
<td>2015-16 financial and election data release</td>
</tr>
</tbody>
</table>

Summary of Changes:

1. The August release of cohort graduates and dropouts included the ability to drill into these data in comparisons by race/ethnicity. Drill-ins had previously been available in the Student Performance section of the Student tab, but not in Comparisons.

2. The November release included 2013-14 and 2014-15 ACT/SAT/AP data for 12th graders. Due to changes in how the CDE reported ACT/SAT/AP data, graphs were changed and data reloaded for 2013-14 and 2014-15. Prior-year data were not loaded because they were no longer comparable. Instead users are directed to DataQuest in the chart notes.

3. The December 2016 release added links to the LCAPs for the first time.

4. The March 2017 release included changing the election graphs at the state and county levels to show 10 years of data instead of only five. The March 2017 release of financial data included a new graph that displays the percentage of unrestricted salaries and benefits to total unrestricted general fund expenditures.

In 2016-17, EdSource and FCMAT/CSIS continued online tours and training efforts begun in 2014-15 to increase awareness of the site and its functionality. In August 2016, EdSource and FCMAT/CSIS conducted an online tour of the 2014-15 cohort data and the new comparison filters. In January 2017, the Ed-Data partnership continued the online demonstrations and began publishing recordings of these online tours. The partnership conducted online demonstrations and published recordings of the following tours:

- Student demographic data and comparisons tour (January 10, 2017)
- Teacher salary data tour (January 31, 2017)
- Financial reports (March 14, 2017)

In 2016-17, EdSource and FCMAT/CSIS continued to demonstrate Ed-Data in a variety of workshops, including:
• CASBO Beyond the Basics conference at Yolo COE on February 10, 2017
• FCMAT Beyond the Basics conference: San Mateo - November 21, 2016; San Bernardino - November 4, 2016; San Diego - November 3, 2016; and Sacramento COE - September 30, 2016
• Presentation to Humboldt COE on November 3, 2016 and Sutter COE on September 21, 2016
• Fall AB 1200 conference at Yolo COE on October 17, 2016 and Ventura COE on October 12, 2016
• CA Charter Schools Association in Los Angeles on October 6, 2016 and Sacramento on September 22, 2016

Many workshop and webinar participants said the live tutorials gave them a much better understanding of the data and functionality available on Ed-Data. Feedback included:

Thank you! I was just barely functional on the site, and now feel much more confident in using it, and aware of all the great data you provide. This is a tremendous resource!!!

This is so much better than previous years! I worked with data years ago and it was pioneering digging. To have then what you have made available now would have moved educational practice so much faster and accurately. Bravo!!!

This was great as it was presented. I learned how to query data using the comparisons. I am excited about that new feature. I loved the slider bar for identifying the top 5% or bottom 5% and to query charter schools and non-charter schools. More of these “How to” webinars would be great and very helpful to support our superintendents and school leadership, strategy and decision making.

The Ed-Data partnership sends out an email announcement to the Ed-Data email list for each new release. On behalf of the partnership, EdSource has been conducting more outreach on social media, specifically Twitter and Facebook, and through EdSource’s social media channels, which is bringing new users to Ed-Data. In late December 2016, EdSource introduced an Ed-Data widget on the EdSource website that allows users to enter a school or district name and be taken to the search results for that name on Ed-Data. From there they can go to that school or district’s profile with a single click.
Since its launch, this widget has taken about 800 additional users to the Ed-Data website. The widget could also easily be packaged so that an individual school, district, or county office of education could place it on its website with a direct link to its own profile on Ed-Data.

The Ed-Data partnership continues to plan further improvements to the site. In 2017-18, the partnership will add California Assessment of Student Performance and Progress (CAASPP) results. Planning for this enhancement began in 2016-17 with EdSource and FCMAT/CSIS hosting four focus groups to get user input on how they wanted Ed-Data to incorporate CAASPP data.
CSIS Technical Support

CSIS Service Desk Activities

FCMAT/CSIS continues to support two external service desks, one for CALPADS and one for other FCMAT/CSIS services that support CALPADS, such as CALPADS LEA Contact Lookup and the Secure Upload site.

CSIS devotes the vast majority of its service desk resources to the CALPADS Service Desk, providing support services to 1,876 LEAs in fiscal year 2016-17, 34 more LEAs than in the previous year. These LEAs had approximately 22,874 CALPADS accounts, an increase of 2,468 accounts from the previous year.

Between July 1, 2016 and June 30, 2017, LEAs submitted 20,179 tickets to the CALPADS Service Desk. CSIS responded to 89% of those tickets and the CDE to 11%. The tables below include a breakdown of tickets by classification and by service fulfillment request category.

<table>
<thead>
<tr>
<th>CALPADS Service Desk Tickets by Type - July 1, 2016 - June 30, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incident Resolution Request</td>
</tr>
<tr>
<td>Request for New Functionality/Service</td>
</tr>
<tr>
<td>Service Fulfillment Request</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Top 10 CALPADS Service Fulfillment Requests by Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gaining Access</td>
</tr>
<tr>
<td>Reports &amp; Extracts</td>
</tr>
<tr>
<td>Data - Exit/Enrollment</td>
</tr>
<tr>
<td>Data - Student Language</td>
</tr>
<tr>
<td>Data - Student Programs</td>
</tr>
<tr>
<td>Data - Course</td>
</tr>
<tr>
<td>Certification Errors</td>
</tr>
<tr>
<td>Data - Staff</td>
</tr>
<tr>
<td>Anomaly Resolution</td>
</tr>
<tr>
<td>Data – Student Absence</td>
</tr>
</tbody>
</table>

California Longitudinal Pupil Achievement Data System

In 2016-17, CALPADS continued to mature and evolve as FCMAT/CSIS performed the full range of activities to support, maintain and enhance CALPADS per direction set by the CDE. When CDE and FCMAT/CSIS planned the work for fiscal year 2016-17, both agencies agreed the major focus for the year would be the Operational Data Store (ODS) audit trail project, the project to capture data changes in CALPADS more effectively. The ODS audit trail was implemented for each major submission, beginning with Fall 1, then Fall 2 and finally the End of Year (EOY) submissions. FCMAT/CSIS created new CALPADS database structures, extraction processes, 68 certification validation checks and 108 certification reports. FCMAT/CSIS trained LEAs on these changes. LEAs were generally able to obtain their snapshot reports during the same day they made updates in CALPADS.
Plans for fiscal year 2016-17 also included:

- Collecting student absence summary data so that rates for chronic absenteeism could be calculated and monitored
- Piloting more stringent validations for the arts, media, and entertainment and agriculture industry sectors in the Perkins E1 data collection (with full implementation of all other industry sectors in fiscal year 2017-18)
- Completing the reporting of Perkins E1 data from CALPADS for the first time in 2016-17
- Expanding direct certification to identify students eligible for free meals or reduced-price meals through Medi-Cal

For the collection of student absence summary data, FCMAT/CSIS work included five new snapshot reports, 11 new input validations, and five new certification validation rules. Changes completed to support the Perkins E1 data collection included implementing new state course codes for the arts, media, and entertainment and agriculture industry sectors; modifying existing validations to improve data quality; implementing two new reports to identify nonconcentrator career technical education (CTE) participants and making report changes to two existing CTE reports. CDE will report 2016-17 Perkins E1 data exclusively from CALPADS, meaning that CDE and FCMAT/CSIS successfully transitioned this collection to CALPADS.

FCMAT/CSIS supported LEAs during five CALPADS submissions by responding to LEA questions and issues, monitoring LEA submission progress and contacting each LEA not on track to certify by the initial deadline and/or the amendment window deadline. Each submission required LEAs to reconcile a minimum of three certification reports with many aggregates. All LEAs certified their Fall 1 data; 99% of LEAs certified Fall 2 and 99% of all LEAs certified EOY 1, EOY 2 and EOY 3.

In fiscal year 2016-17, FCMAT/CSIS performed the full range of activities involved in supporting and maintaining CALPADS per direction set by the CDE.

FCMAT/CSIS staff provided change and issue as well as requirements management services for CALPADS, completing analysis on 206 change requests and 83 issues. For approved changes, FCMAT/CSIS requirements staff created and updated documentation in accordance with the change request, including design specifications excerpts used in development and testing activities and the subsequent final updates to CALPADS technical documentation and end-user manuals. In addition, requirements staff clarified requirements for the development and testing teams as these teams completed their work associated with each change request.

FCMAT/CSIS technical staff supported system operations, developed new functionality and improved the usability and accuracy of CALPADS with additional bug fixes. Between July 1, 2016 and June 30, 2017, CSIS developers completed 149 change requests spanning 776 work items. Testers verified the work of FCMAT/CSIS and CDE developers, having tested and closed 906 work items during the fiscal year.

**CSIS Website**

The CSIS program’s website is accessible from the FCMAT site or directly via http://csis.fcmat.org. The CSIS website offers access to CALPADS training, documentation and information, as well as links to other CSIS services, such as the LEA Contact Lookup, the Secure Upload site, LEA Recognition and
Ed-Data. The website includes information and resources in three areas: services, training & events, and support.

**SharePoint Collaboration Sites**

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

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