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**SPECIAL EDUCATION FISCAL & PROGRAM UPDATES  
DBUG MEETING  
October 21, 2021**

**Special Education Revenue & Expenditures:**

- Special Education Dispute Prevention & Dispute Resolution & Learning Recovery Support Apportionments:
  - ◆ Please see the attached detailed Summary

**Special Education Data Reporting:**

- Timelines & Due Dates:
  - Excess Cost Calculation
  - Special Education Maintenance of Effort – SEMB & SEMA Reports & Subsequent Year Tracking Worksheet:
    - Was due to the SELPA, in hard copy form, on September 15, 2021
- Special Education Property Taxes:
  - ◆ Issue with the current distribution method
- Educationally Related Mental Health Services (ERMHS):
  - ◆ Resource #6512, is effective until June 30, 2022
  - ◆ Fund #10, SELPA AU has an estimated balance of \$109,000
  - ◆ LEAs have an estimated ending balance of \$33,392
    - The balances must be expended by June 30, 2021, and must be used for students with an IEP
- **SCOE 6-22 & Preschool Severe Program Monthly Pupil Count:**
  - ◆ October 1, 2021

➤ **Special Education Information System (SEIS):**

- ◆ LEAs that have students attending a Consortium, SCOE or another LEA's Program can review their students in the SEIS
- ◆ Your LEA's CASEMIS Manager, can search for these students by adding the optional filter "Include students who are not served in the district, but are residents"
- ◆ For access to the SEIS, your CASEMIS Manager can create a "read only" password

SONOMA COUNTY  
SPECIAL EDUCATION LOCAL PLAN AREA

DISTRIBUTION OF THE  
SPECIAL EDUCATION PROPERTY TAXES

Historical Data on the Allocation Plan:

The Special Education Funding Allocation Plan is comprised of three funding sources, as follows:

- Special Education Property Taxes, Resource #6500
- Local Assistance Entitlement, Resource #3310
- State Funding, Resource #6500

The total of these funding sources is the total Special Education Revenue distributed to the Local Educational Agencies (LEAs) based on the current Funding Allocation Plan. The funding sources are distributed to each LEA based on each funding source distribution method.

Special Education Property Taxes:

The Special Education Property Taxes are distributed to the LEAs based on the current year average of the December 1<sup>st</sup> & April 1<sup>st</sup> Count of the students attending a SCOE 6-22 Program and the average of the October 1<sup>st</sup>, February 1<sup>st</sup>, April 1<sup>st</sup> and June 1<sup>st</sup> Count of the students attending the SCOE Preschool Program.

With the LEAs Program Transfers and the declining enrollment, the rate per student has increased sufficiently. The sufficient rate increase has created an issue. When the Property Taxes and Local Assistance Entitlement are more than the LEA's total Special Education Allocation, the LEA will owe the SELPA state funding to be distributed to the other SELPA members.

The SELPA would like to get some recommendations on how and if the Special Education Property Taxes should be distributed differently due to the declining enrollment in SCOE Operated Programs.

## SONOMA COUNTY SELPA

2021-22 SPECIAL EDUCATION REVENUE FUNDING SOURCES PROJECTIONS  
ADVANCE APPORTIONMENT - CERTIFIED JULY 2021

Area/Districts	Total	Special Education	Local Assistance	State
	Special	Property Taxes	Entitlement	Special Education
	Education	Res #66500 Obj #8097	Res #3310 Obj #8181	Revenue
Revenue	Res #66500 Obj #8097	District	Res #6500 Obj #8792	
	Column A	Column B	Column C	Column E
<b>Area 1</b>				
Sonoma Valley USD	3,134,512	390,512	821,101	1,922,899
Total Area 1	3,134,512	390,512	821,101	1,922,899
<b>Area 2</b>				
Cinnabar ESD	207,313	0	54,827	152,486
Dunham ESD	121,418	0	33,940	87,478
Liberty ESD	149,578	0	24,803	124,775
Old Adobe Union ESD	1,122,707	71,002	326,352	725,353
Petaluma City Elem SD	1,779,221	35,501	432,090	1,311,630
Petaluma City High SD	4,621,368	514,766	1,189,226	2,917,376
Two Rock Union ESD	140,901	0	28,719	112,182
Wauugh ESD	505,020	35,501	101,822	367,697
Wilmar Union ESD	173,983	0	33,940	140,043
Total Area 2	8,821,509	656,770	2,225,719	5,939,020
<b>Area 3</b>				
Cotati-Rohnert Park USD	5,124,046	958,529	1,029,966	3,135,551
Total Area 3	5,124,046	958,529	1,029,966	3,135,551
<b>Area 4</b>				
Bellevue Union SD	1,768,869	869,776	327,657	571,436
Bennett Valley Union SD	493,640	35,501	135,762	322,377
Kenwood ESD	157,086	35,501	22,192	99,393
Mark West Union ESD	823,260	248,508	167,092	407,660
Piner-Olivet Union ESD	919,987	248,508	151,427	520,052
Rincon Valley UESD	2,590,321	284,009	565,241	1,741,071
Roseland ESD	1,250,856	266,258	475,168	509,430
Santa Rosa City Elem SD	4,224,158	1,278,039	874,623	2,071,496
Santa Rosa City High SD	10,149,652	3,070,843	2,417,614	4,661,195
Wright ESD	1,404,481	532,516	272,830	599,135
Total Area 4	23,782,310	6,869,459	5,409,606	11,503,245
<b>Area 5</b>				
W. Sonoma Co. UHSD	1,408,045	532,516	357,681	517,848
Forestville Union ESD	176,264	142,004	48,300	-14,040
Fort Ross ESD	105,331	0	5,222	100,109
Gravenstein Union ESD	303,295	35,501	75,714	192,080
Guerneville ESD	255,727	35,501	50,911	169,315
Harmony Union ESD	150,785	35,501	32,635	82,649
Monte Rio Union ESD	182,484	0	7,832	174,652
Montgomery ESD	75,634	0	3,916	71,718
Oak Grove Union ESD	488,113	142,004	109,655	236,454
Sebastopol Union ESD	478,289	230,757	86,157	161,375
Twin Hills Union ESD	371,143	0	126,624	244,519
Total Area 5	3,995,110	1,153,784	904,647	1,936,679
<b>Area 6</b>				
Alexander Valley UESD	92,214	0	11,749	80,465
Cloverdale USD	1,040,152	355,011	271,525	413,616
Geyserville USD	178,011	0	46,995	131,016
Healdsburg USD	1,396,206	284,009	221,919	890,278
Horicon ESD	131,227	0	16,970	114,257
Kashia ESD	105,241	0	5,222	100,019
West Side ESD	182,234	0	23,497	158,737
Windsor USD	3,271,064	71,002	1,015,606	2,184,456
Total Area 6	6,396,349	710,022	1,613,483	4,072,844
<b>Area 7</b>				
DHOH/VI Itinerant Program	3,503,756	0	0	3,503,756
Santa Rosa City Schools DHH	642,706	0	0	642,706
Adaptive Technology Center	458,053	0	0	458,053
Independent Advocate Prgm	100,874	0	0	100,874
NPS-Out of State Placement	51,657	0	0	51,657
SCOE - Court Schools	79,293	0	16,970	62,323
SCOE - Community Schools	-7	0	0	-7
Transportation - LCI	100,000	0	0	100,000
Sign Language Interpreter	140,000	0	0	140,000
CCS Equipment / Space	148,266	0	0	148,266
SELPA Regionalized Services	87,599	0	0	87,599
Total Area 7	5,312,197	0	16,970	5,295,227
<b>Area 8</b>				
CA Virtual Academy	514,976	0	115,231	399,745
Heartwood Charter	101,819	0	22,845	78,974
Pathways Charter School	341,215	0	76,559	264,656
The Reach School	100,889	0	25,822	75,067
Sebastopol Indep Charter	244,231	0	54,468	189,763
Total Area 8	1,303,130	0	294,925	1,008,205
Total Sonoma County	57,869,163	10,739,076	12,316,417	34,813,670

SONOMA COUNTY  
SPECIAL EDUCATION LOCAL PLAN AREA

2020-21 EDUCATIONALLY RELATED MENTAL HEALTH SERVICES REVENUE  
LEA ALLOCATION, BEGINNING BALANCE, EXPENSES & ENDING BALANCE

Area/Districts	Total Number of Students* Column A	Estimated Mental Health Allocation \$2,393,697,2878 Column B	Beginning Balance Column C	Board & Care Cost Reimbursement Column D	Additional Allocation Column E	Estimated ERMHS Revenue Column F	ERMHS Expenses as of June 2021 Column G	Estimated Ending Balance Column H	Amount to be Expended RS #6512 Column I
<b>Area 1</b>									
Sonoma Valley USD	82.00	196,283	15,339	263,654	0	475,276	483,706	0	0
<b>Total Area 1</b>	<b>82.00</b>	<b>196,283</b>	<b>15,339</b>	<b>263,654</b>	<b>0</b>	<b>475,276</b>	<b>483,706</b>	<b>0</b>	<b>0</b>
<b>Area 2</b>									
Cinnabar ESD	3.50	8,378	0	0	0	8,378	8,378	0	0
Dunham ESD	0.00	0	2,645	0	0	2,645	0	2,645	2,645
Liberty ESD	0.00	0	0	0	0	0	0	0	0
CA Virtual Academy	31.00	74,205	0	0	0	74,205	65,587	8,618	0
Heartwood Charter School	3.50	8,378	0	0	0	8,378	8,378	0	0
Old Adobe Union ESD	9.00	21,543	0	0	0	21,543	21,543	0	0
Petaluma City Schools	196.50	470,362	363,900	163,518	0	997,780	764,384	233,396	0
Two Rock Union ESD	0.00	0	0	0	0	0	0	0	0
Waugh ESD	6.00	14,362	0	0	0	14,362	14,362	0	0
Wilmar Union ESD	0.00	0	1,193	0	0	1,193	0	1,193	1,193
<b>Total Area 2</b>	<b>249.50</b>	<b>597,228</b>	<b>367,738</b>	<b>163,518</b>	<b>0</b>	<b>1,128,484</b>	<b>882,632</b>	<b>245,852</b>	<b>3,838</b>
<b>Area 3</b>									
Cotati-Rohnert Park USD	140.50	336,314	0	202,137	0	538,451	605,270	0	0
<b>Total Area 3</b>	<b>140.50</b>	<b>336,314</b>	<b>0</b>	<b>202,137</b>	<b>0</b>	<b>538,451</b>	<b>605,270</b>	<b>0</b>	<b>0</b>
<b>Area 4</b>									
Bellevue Union SD	16.00	38,299	0	0	0	38,299	0	38,299	0
Bennett Valley Union SD	4.00	9,575	0	0	0	9,575	9,575	0	0
Kenwood ESD	0.50	1,197	1,717	0	0	2,914	0	2,914	1,717
Mark West Union ESD	9.50	22,740	2,327	0	0	25,067	25,067	0	0
Piner-Olivet Union ESD	9.00	21,543	0	0	0	21,543	21,543	0	0
Rincon Valley UESD	37.00	88,567	15,204	0	0	103,771	91,084	12,687	0
Roseland ESD	23.00	55,055	0	0	0	55,055	55,055	0	0
Santa Rosa City Schools	316.00	756,408	0	495,823	0	1,252,231	2,703,926	0	0
Wright ESD	25.00	59,842	1,196	0	0	61,038	34,228	26,810	0
<b>Total Area 4</b>	<b>440.00</b>	<b>1,053,226</b>	<b>20,444</b>	<b>495,823</b>	<b>0</b>	<b>1,569,493</b>	<b>2,940,478</b>	<b>80,710</b>	<b>1,717</b>
<b>Area 5</b>									
W. Sonoma Co. UHSD	32.00	76,598	28,496	154,947	0	260,041	259,712	329	0
Forestville Union ESD	1.00	2,394	0	0	0	2,394	2,394	0	0
Fort Ross ESD	0.00	0	0	0	0	0	0	0	0
Gravenstein Union ESD	1.00	2,394	15,043	0	0	17,437	17,437	0	0
Guerneville ESD	1.00	2,394	2,837	109,267	0	114,498	111,661	2,837	0
Harmony Union ESD	1.50	3,591	19,502	0	0	23,093	13,591	9,502	5,911
Monte Rio Union ESD	0.50	1,197	0	0	0	1,197	1,197	0	0
Montgomery ESD	0.00	0	1,586	0	0	1,586	0	1,586	1,586
Oak Grove Union ESD	3.00	7,181	0	0	0	7,181	7,181	0	0
Pathways Charter School	7.50	17,953	23,850	0	0	41,803	41,803	0	0
Sebastopol Union ESD	3.00	7,181	0	0	0	7,181	7,181	0	0
Sebastopol Charter School	6.50	15,559	0	0	0	15,559	15,559	0	0
REACH School	4.00	9,575	21,555	0	0	31,130	9,575	21,555	11,980
Twin Hills Union ESD	5.00	11,968	0	0	0	11,968	11,968	0	0
<b>Total Area 5</b>	<b>66.00</b>	<b>157,985</b>	<b>112,869</b>	<b>264,214</b>	<b>0</b>	<b>535,068</b>	<b>499,259</b>	<b>35,809</b>	<b>19,477</b>
<b>Area 6</b>									
Alexander Valley UESD	1.50	3,591	8,460	0	0	12,051	100	11,951	8,360
Cloverdale USD	30.00	71,811	0	0	0	71,811	124,218	0	0
Geyserville USD	2.00	4,787	7,155	0	0	11,942	4,530	7,412	0
Healdsburg USD	37.50	89,764	0	110,654	0	200,418	200,418	0	0
Horicon ESD	2.00	4,787	0	0	0	4,787	4,787	0	0
Kashia ESD	0.00	0	0	0	0	0	0	0	0
West Side ESD	1.50	3,591	0	0	0	3,591	3,591	0	0
Windsor USD	84.50	202,267	515	0	0	202,782	203,521	0	0
<b>Total Area 6</b>	<b>159.00</b>	<b>380,598</b>	<b>16,130</b>	<b>110,654</b>	<b>0</b>	<b>507,382</b>	<b>541,165</b>	<b>19,363</b>	<b>8,360</b>
<b>Area 7:</b>									
Court Schools	5.50	13,165	13,233	0	0	26,398	25,443	955	0
Community Schools	0.50	1,197	0	0	0	1,197	1,093	104	0
<b>Total Area 7</b>	<b>6.00</b>	<b>14,362</b>	<b>13,233</b>	<b>0</b>	<b>0</b>	<b>27,595</b>	<b>26,536</b>	<b>1,059</b>	<b>0</b>
<b>Total Allocation</b>	<b>1,143.00</b>	<b>2,735,996</b>	<b>545,753</b>	<b>1,500,000</b>	<b>0</b>	<b>4,781,749</b>	<b>5,979,046</b>	<b>382,793</b>	<b>33,392</b>

SONOMA COUNTY  
SPECIAL EDUCATION LOCAL PLAN AREA

NEW SPECIAL EDUCATION REVENUE  
LEARNING RECOVERY SUPPORT APPORTIONMENT  
&  
ALTERNATIVE DISPUTE PREVENTION & RESOLUTION APPORTIONMENT  
SUMMARY

**General Information for both Special Education Apportionments:**

- Count used for these Apportionments is the 2019-20 Fall 1 Census Count
- These funds cannot be used to supplant exiting expenditures or obligations and cannot be used for attorney fees
- These Funds are available until September 30, 2021, must be encumbered by June 30, 2023
- New definition of “matching funds” – the revenue must match the appropriate services and support (expenditures) included in the LEAs Plans
- As a condition of receiving these funds, the SELPA will work with its member LEAs to develop a plan detailing how your LEA will implement the requirement of each of these Apportionments
- The individual LEA Plans **must** be received by the SELPA on Monday, September 27, 2021
- The Plan is a SELPA-level Plan and will include data from all of our member LEAs
- The SELPA-level Plan is due to CDE by October 1, 2021
- CDE has recognized that there could be an issue with LEAs not meeting the Maintenance of Effort (MOE) Compliance due to these one-time funds. They are working on addressing the issue, once the SELPA has received information from CDE, we will notice all member LEAs
- One recommendation to reduce the impact of your LEA meeting the MOE Compliance is to expend half of the funds this year and the other half next year
- 10% Cap on Supplies & Materials has been eliminated, despite what the template states

**Learning Recovery Support:**

- These funds are to be expended for the purposes of providing learning recovery support to pupils with disabilities due to the disruption of school during the period of March 13, 2020 to September 1, 2021, included in your LEA’s Plan
- The Resource Code for these funds is #6537, with a Revenue Object Code of #8590
- The Resource Code is not set-up in SACS yet, once the Resource Code is set up, your LEA’s Advisor will set up the revenue account code
- Once the Resource Code is set up, the total allocation will be distributed to the LEAs

**Dispute Prevention & Dispute Resolution:**

- These funds are to be expended for the purpose of conducting activities to prevent and resolve special education disputes due to the disruption of school during the period of March 13, 2020 to September 1, 2021, included in your LEA’s plan
- The SELPA will receive 20% and LEAs will receive 80% of the funds
- These funds will be allocated (not disbursed) to the member LEAs
- The LEAs will need to demonstrate how these funds are expended and will be reimbursed up to their allocation
- The Resource Code for these funds is #6536, with a Revenue Object Code of #8590
- Again, the Resource Code is not set-up in SACS yet, once the Resource Code is set up, your LEAs Advisor will set up the revenue account code

Please be reminded, LEAs are not obligated to take these funds and can take only a portion of their allocation

Sonoma County Office of Education  
Special Education Behavioral Health Services

DOR	October 2021 Pupil Count	Preschool Pupil Count
4970599 Alexander Vly		
4970607 West Co.	17	
4970615 Bellevue	14.5	8
4970623 Bennett Vly	2	
4970649 Cinnabar		
4970656 Cloverdale	6	
4970672 Dunham		
4970680 Forestville	2	1
4970698 Fort Ross		
4970706 Geyserville		
4970714 Gravenstein	1	1
4970722 Guerneville	2	1
4970730 Harmony	1	
4970763 Horicon		
4970789 Kenwood	1	
4970797 Liberty		
4970805 Mark West	7	
4970813 Monte Rio		
4970821 Montgomery		
4970839 Oak Grove	1	1
4970847 Old Adobe	2	
4970854 Petaluma Elem	1	
4970862 Petaluma High	6	
4970870 Piner Olivet	6	
4970888 Kashia		
4970896 Rincon Vly	5.5	
4970904 Roseland	4	1
4970912 SRCS Elem	26	6
4970920 SRCS High	68.5	
4970938 Sebastopol	4	
4970953 Sonoma Valley	12	
4970961 Twin Hills		
4970979 Two Rock		
4970995 Waugh		
4971001 West Side Union		
4971019 Wilmar		
4971035 Wright	9	1
4973882 CRPUSD	29.5	
4975358 Windsor	2	
4975390 Healdsburg	6	
2866241 Napa County/Calistoga Joint Unified	2	
<b>Total October 2021 Pupil Count</b>	<b>238</b>	<b>20</b>