Hearing Date: July 27, 2018

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ITEM 4

INCORRECT REDUCTION CLAIM PROPOSED DECISION

Education Code Sections 44662 and 44664 Statutes 1983, Chapter 498, Statutes 1999, Chapter 4

The Stull Act

Fiscal Years 2005-2006, 2006-2007, 2007-2008, and 2008-2009

14-9825-I-02

Carlsbad Unified School District, Claimant

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SixTen and Associates

Mandate Reimbursement Services

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San Diego, CA 92117

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June 4, 2015

Heather Halsey, Executive Director Commission on State Mandates 980 Ninth Street, Suite 300 Sacramento, CA 95814 RECEIVED

JUN 0 9 2015

COMMISSION ON STATE MANDATES

RE: C

Chapter 498/83 and 4/99, The Stull Act

FY 2005-06 through 2008-09 Incorrect Reduction Claim

Dear Ms. Halsey:

Enclosed is the original and two copies of the above referenced incorrect reduction claim for Carlsbad Unified School District.

SixTen and Associates has been appointed by the District as its representative for this matter and all interested parties should direct their inquiries to me, with a copy as follows:

Suzanne O'Connell, Deputy Superintendent Administrative Services

Carlsbad Unified School District

6225 El Camino Real

Carlsbad, CA 92009-1604

Voice:

760-331-5036

Fax:

760-331-5094

E-Mail:

soconnell@carlsbadusd.net

Sincerely,

Keith B. Petersen

Enclosure: Incorrect Reduction Claim

C: Suzanne O'Connell, Deputy Superintendent Administrative Services

Carlsbad Unified School District

COMMISSION ON STATE MANDATES

1. INCORRECT REDUCTION CLAIM TITLE

498/83 and 4/99 The Stull Act

2. **CLAIMANT INFORMATION**

Carlsbad Unified School District

Suzanne O'Connell, Deputy Superintendent Administrative Services Carlsbad Unified School District 6225 El Camino Real Carlsbad, CA 92009-1604

Voice:

760-331-5036

Fax:

760-331-5094

E-Mail:

soconnell@carlsbadusd.net

3. **CLAIMANT REPRESENTATIVE INFORMATION**

Claimant designates the following person to act as its sole representative in this incorrect reduction claim. All correspondence and communications regarding this claim shall be forwarded to this representative. Any change in representation must be authorized by the claimant in writing, and sent to the Commission on State Mandates.

Keith B. Petersen, President SixTen and Associates P.O. Box 340430 Sacramento, CA 95834-0430

Voice: (916) 419-7093 Fax: (916) 263-9701

E-mail: Kbpsixten@aol.com

	For CSM Use Only	
Filing Date:	KECEIVED	
	2 7 2015	
	JUN 0 9 2015	
	COMMISSION ON	
IRC #:	STATE MANDATES	14-9825-I-02
4. IDE	NTIFICATION OF STATUTE	
FXF	CUTIVE ORDERS	

Statutes of 1983, Chapter 498, Statutes of 1999, Chapter 4, **Education Code Sections 44660-44665**

5. AMOUNT OF INCORRECT REDUCTION

Fiscal Year	Amount of Reduction
2005-2006 2006-2007 2007-2008 2008-2009	\$ 45,637 \$ 124,851 \$ 60,859 \$ 42,754
TOTAL:	\$ 274,101

6. NOTICE OF NO INTENT TO CONSOLIDATE This claim is **not** being filed with the intent to consolidate on behalf of other claimants.

Sections 7-12 are attached as follows:

7. Written Detailed Narrative:	Pages 1 to 19
8. Controller's Payment Letters:	Exhibit A
9. Parameter's and Guidelines:	Exhibit B
10. Claiming Instructions:	Exhibit C
11. Final SCO Audit Report:	Exhibit D
12. Annual Reimbursement Claims:	Exhibit E

13. **CLAIM CERTIFICATION**

This claim alleges an incorrect reduction of a reimbursement claim filed with the State Controller's Office pursuant to Government Code section 17561. This incorrect reduction claim is filed pursuant to Government Code section 17551, subdivision (d). I hereby declare, under penalty of perjury under the laws of the State of California, that the information in this incorrect reduction claim submission is true and complete to the best of my own personal knowledge or information or belief.

Suzanne O'Connell, Deputy Superintendent Administrative Services

Signature Vonnell 6-2-15

1 2 3 4 5 6 7 8	Claim Prepared by: Keith B. Petersen, President SixTen and Associates P. O. Box 340430 Sacramento, California 95834-0430 Voice: (916) 419-7093 Fax: (916) 263-9701 kbpsixten@aol.com	
9	BEF	ORE THE
10	COMMISSION O	N STATE MANDATES
11	STATE O	F CALIFORNIA
12 13 14 15 16 17 18 19 21 22 23 24 25 26 27 28	CARLSBAD UNIFIED School District Claimant.	No. CSM Statutes 1983, Chapter 498 Statutes 1999, Chapter 4 Education Code Sections 44660-44665 The Stull Act Annual Reimbursement Claims: Fiscal Year 2005-06 Fiscal Year 2006-07 Fiscal Year 2007-08 Fiscal Year 2008-09 INCORRECT REDUCTION CLAIM FILING
29		RITY FOR THE CLAIM
30		tes has the authority pursuant to Government
31	Code Section 17551(d) to " to hear a	nd decide upon a claim by a local agency or
32		, 1985, that the Controller has incorrectly
33	reduced payments to the local agency or	r school district pursuant to paragraph (2) of
34	subdivision (d) of Section 17561." Carls	bad Unified School District (hereafter "District")

Incorrect Reduction Claim of Carlsbad Unified School District 498/83 The Stull Act

- is a school district as defined in Government Code Section 17519. Title 2, CCR,
- 2 Section 1185.1, subdivision (a), requires the claimant to file an incorrect reduction claim
- 3 with the Commission.

This incorrect reduction claim is timely filed. Title 2, CCR, Section 1185.1, subdivision (c), requires incorrect reduction claims to be filed no later than three years following the date of the Controller's remittance advice notifying the claimant of a reduction. A Controller's audit report (Exhibit "D") dated June 15, 2012 has been issued and constitutes a demand for repayment and adjudication of the claim. On July 13, 2012, the Controller issued "results of review letters" (Exhibit "A") reporting the audit results and amounts due the state and this constitutes a payment action.

There is no alternative dispute resolution process available from the Controller's office. The audit report states that an incorrect reduction claim should be filed with the Commission if the claimant disagrees with the audit findings.

PART II. SUMMARY OF THE CLAIM

The Controller conducted a field audit of the District's annual reimbursement claims for Fiscal Years 2005-06, 2006-07, 2007-08, and 2008-09, for the costs of complying with the legislatively mandated program 498/83 The Stull Act. As a result of the audit, the Controller determined that \$274,101 of the claimed costs were unallowable:

20	Fiscal	Amount	Audit	SCO	Amount Due <state> District</state>
21	<u>Year</u>	<u>Claimed</u>	<u>Adjustment</u>	<u>Payments</u>	
22	FY 2005-06	\$105,192	\$ 45,637	\$ 0	\$ 59,555

Incorrect Reduction Claim of Carlsbad Unified School Distric	Ŀ
498/83 The Stull Act	

1	FY 2006-07	\$168,221	\$124,851	\$ 0	\$43,370
2	FY 2007-08	\$136,502	\$ 60,859	\$ 0	\$75,643
3	FY 2008-09	<u>\$102,846</u>	<u>\$ 42,754</u>	<u>\$89,625</u>	<\$29,5 <u>3</u> 3>
4	4 year Total	\$512,761	\$274,101	\$89,625	\$149,035

Since the District has been paid \$89,625 for these claims, the audit report concludes that the amount of \$149,035 is due to the District.

PART III. PREVIOUS INCORRECT REDUCTION CLAIMS

The District has not filed any previous incorrect reduction claims for this mandate program. The District is aware of one incorrect reduction claim having been filed (14-9825-I-01, Oceanside Unified School District), but it has not yet been adjudicated.

PART IV. BASIS FOR REIMBURSEMENT

1. Mandate Legislation

Statutes 1983, Chapter 498 and Statutes 1999, Chapter 4, among other things, added or amended Education Code sections 44660-44665, which required school districts to develop and adopt specific guidelines to evaluate and assess certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives.

2. Test Claim

The Commission on State Mandates determined on May 27, 2004, that

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with permanent status who have been employed at least ten years with

the school district, are highly qualified (as defined in 20 U.S.C. section

exceeding standards, if the evaluator and certificated employee being

7801), and whose previous evaluation rated the employee as meeting or

evaluated agree.

Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Education Code section 44662, subdivision (b), as amended by Statutes 1999, Chapter 4).

Reimbursement for this activity is limited to the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- o once each year for probationary certificated employees;
- o every other year for permanent certificated employees; and
- o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 USC., section 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being

evaluated agree.

Assess and evaluate permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year). The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district. (Education Code section 44664, as amended by Statutes 1983, Chapter 498). This additional evaluation and assessment of the permanent certificated employee requires the school district to perform the following activities:

evaluate and assess the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities

1			established by the school district for certificated non-instructional
2			personnel (Education Code section 44662, subdivisions (b) and (c));
3	o)	the evaluation and assessment shall be reduced to writing. (Education
4			Code section 44663, subdivision (a).) The evaluation shall include
5			recommendations, if necessary, as to areas of improvement in the
6			performance of the employee. If the employee is not performing his or her
7			duties in a satisfactory manner according to the standards prescribed by
8			the governing board, the school district shall notify the employee in writing
9			of that fact and describe the unsatisfactory performance (Education Code
10			section 44664, subdivision (b));
	c)	transmit a copy of the written evaluation to the certificated employee
12			(Education Code section 44663, subdivision (a));
13	c)	attach any written reaction or response to the evaluation by the
14			certificated employee to the employee's personnel file (Education Code
15			section 44663, subdivision (a)); and
16	C	0	conduct a meeting with the certificated employee to discuss the evaluation
17			(Education Code section 44553, subdivision (a)).
18	-	The C	commission further found that the activities listed above do not constitute
19	r	reimb	ursable state-mandated programs with respect to certificated personnel
20	•	emplo	oyed in local, discretionary educational programs.
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3. Parameters and Guidelines

On September 27, 2005, the original parameters and guidelines were adopted and have not been revised. A copy of the parameters and guidelines is attached as Exhibit "B."

4. <u>Claiming Instructions</u>

The Controller has periodically issued or revised claiming instructions for the mandate program. A copy of the first claiming instructions dated December 12, 2005, is attached as Exhibit "C." Subsequent claiming instructions are believed to be, for the purposes and scope of this incorrect reduction claim, substantially similar to the version extant at the time the claims which are the subject of this incorrect reduction claim were filed. The most recent version can be found at the Controller's website:

(http://www.sco.ca.gov/Files-ARD-Local/Manuals/sd_1314_tsa260.pdf). However, since the Controller's claim forms and instructions have not been adopted as regulations, they have no force of law, and, therefore, have no effect on the outcome of this incorrect reduction claim.

PART V. STATE CONTROLLER CLAIM ADJUDICATION

The Controller conducted an audit of the District's annual reimbursement claims for Fiscal Years 2005-06, 2006-07, 2007-08, and 2008-09. The audit concluded that 46% of the District's costs, as claimed, were allowable. A copy of the June 15, 2012, audit report is attached as Exhibit "D" and is incorporated herein by reference.

PART VI. CLAIMANT'S RESPONSE TO THE STATE CONTROLLER

By letter dated May 2, 2012, the Controller transmitted a copy of its draft audit report. The District responded by letter dated May 9, 2012 and disputed several findings. The Controller issued its final audit report on June 15, 2012, with a minor change to the number of approved evaluations.

PART VII. STATEMENT OF THE ISSUES

FINDING Overstated salaries and benefits and related indirect costs

The District claimed \$512,761 in salaries and benefits and related indirect costs claimed for the audit period. The audit report determined that \$238,660 is allowable and \$274,101 is "unallowable primarily because the district claimed reimbursement for non-mandated activities" rather than due to insufficient documentation.

PART A. TIME STUDY ACTIVITIES

In response to the Controller's exclusion at the beginning of the audit of all of the original claim documentation, the District with the agreement of the auditor prepared a time study based on the FY 2010-11 certificated staff evaluation cycle. The time study identified 22 discrete activities established as a result of staff interviews. Actual time spent on these activities was collected from the employees involved. An average time spent for each of these activities was calculated. These average times per activity were assigned to a relevant job title or group of titles for purposes of determining the appropriate productive hourly rate to be applied to each activity. However, the audit report allows only 3 of the 22 time study activities. This is the major single source of

Incorrect Reduction Claim of Carlsbad Unified School District 498/83 The Stull Act

- 1 adjustment to the claimed costs.
- 2 <u>3 Activities Allowed</u>
- 3 1. Conducting "informal" classroom observations
- 4 2. Conducting "formal" classroom observations
- 5 3. Writing Final Evaluation Reports and/or preparing Teacher Evaluation Report
- 6 <u>19 Disallowed Activities</u>
- 7 1. Preparing before training or planning meetings/conferences;
- 8 2. Training or planning meetings/conferences;
- 9 3. Preparing/organizing notes from training or planning meetings/conferences;
- 10 4. Preparing before meeting with teachers;
 - 5. Conducting actual conference with teachers;
- 12 6. Preparing or organizing notes from meetings with teachers;
- 7. Preparing before "Pre-Observation" conferences with teachers:
- 14 8. Conducting "Pre-Observation" conferences with teachers:
- 15 9. Preparing/organizing notes from "Pre-Observation" conferences with teachers;
- 16 10. Preparing before classroom observations of teachers;
- 17 11. Preparing/organizing notes from classroom observations, finalizing Collect Data
- 18 forms;
- 19 12. Reporting observations, preparing the Standards for Excellence in Teaching
- 20 observation checklists;
- 21 13. Preparing before "Post-Observation" conferences with teachers;

Incorrect Reduction Claim of Carlsbad Unified School District 498/83 The Stull Act

1	14.	Conducting "Post-Observation" conferences with teachers;
2	15.	Preparing notes from "Post-Observation" conferences and preparing Reflecting
3		Conference worksheets;
4	16.	Preparing before Final Evaluation conferences with teachers;
5	17.	Conducting Final Evaluation conferences with teachers;
6	18.	Preparing/organizing notes from Final Evaluation conferences with teachers; and
7	19.	Discussing the STAR results with teachers and assessing how to improve
8		instructional abilities.
9	These	e 19 activities can be organized into four groups of related activities:
10	1.	Evaluation Conferences
•		Evaluation conferences are a method of implementing this mandate, and not just
12	a subj	ect matter activity. The audit report (A.R., p. 7) concluded that:
13 14 15 16		Conferences between the evaluators and teachers also are not reimbursable because they were required before the enactment of the test claim legislation. These activities are not imposing a new program or higher level of service. Conferences, as well as pre-, post-, final observation conferences, and conference-related activities are not reimbursable.
18		The Controller has confused the subject matter of the old and new mandates
19	with th	ne method of implementation. The Commission has already determined (SOD, p.
20	29, 30)) that:
21 22 23 24		Under prior law, the evaluation had to be reduced to writing and a copy of the evaluation given to the employee. An evaluation meeting had to be held between the certificated employee and the evaluator to discuss the evaluation and assessment.
25		The 1983 test claim statute still requires school districts to reduce the evaluation

to writing, to transmit a copy to the employee, and to conduct a meeting with the employee to discuss the evaluation and assessment. These activities are not new. However, the 1983 test claim statute amended the evaluation requirements by adding two new evaluation factors: the instructional techniques and strategies used by the employee, and the employee's adherence to curricular objectives. Thus, school districts are now required by the state to evaluate and assess the competency of certificated instructional employees as it reasonably relates to:

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- the progress of students toward the established standards of expected student achievement at each grade level in each area of study;
- the instructional techniques and strategies used by the employee;
- 0 the employee's adherence to curricular objectives; and
- the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities.

School districts may have been evaluating teachers on their instructional techniques and adherence to curricular objectives before the enactment of the test claim statute based on the evaluation guidelines developed through the collective bargaining process. But, the state did not previously require the evaluation in these two areas. Government Code section 17565 states that "if a . . . school district, at its option, has been incurring costs which are subsequently mandated by the state, the state shall reimburse the . . . school district for those costs after the operative date of the mandate." Emphasis added.

Therefore, the fact that districts used evaluation conferences to implement the previous mandated activities does not exclude reimbursement to use the same method to implement the new activities. The approved mandate reimburses the new program requirement to "evaluate and assess" which necessarily involves a comprehensive process. The conferences and related tasks are effective and efficient methods to evaluate and assess employees and necessary to communicate the findings of the evaluation to the employee. Even if conferences were part of previous evaluation procedures the subject matter of these conferences is now different as a result of the changes to the Stull Act.

2. Preparation Activities

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The audit report (A.R., p. 7) concluded that: "(t)he activities related to planning, preparation, and organizing notes are not reimbursable under the mandate." Further, (A.R., p. 13) that "reimbursement is limited to only those activities outlined in the parameters and guidelines (sections IV.A.1, IV.A.2, and IV.B.1)." For purposes of the time study, preparation time was isolated to improve the accuracy of the result. The preparation time could have been logically merged with the activity relevant to the preparation. Preparation time was not explicitly considered or denied by the Commission statement of decision. The parameters and guidelines document enumerates the subject matter of the evaluation process and not the entire process to implement the mandate. There are no conditions or limitations stated on the nature of the staff time reimbursable, that is, planning and preparation time is not excluded in the parameters and guidelines. Even the Controller characterizes the parameters and guidelines as an "outline." Preparation is a rational, relevant, reasonable and necessary part of implementing the mandated activities in the usual course of business and the Controller has stated no basis to exclude it from the scope of the evaluation process.

3. <u>Training Activities</u>

The audit report (A.R., p. 7) concluded that:

The district duplicated costs by including training activities in its time study and again as a direct cost item in each fiscal year. Further, training time reported in the time study is not an activity repetitive in nature and is not appropriate for a time study. We determined allowable time spent on training from the district's

1 original claims.

- The audit report allows most of the training costs as direct costs. The District does not
- dispute removal of the training time from the time study.

4. <u>STAR Testing Results</u>

The audit disallows the time to review the STAR test results without explanation. The Commission (SOD, p. 32) determined that "the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664 . .

. " is reimbursable.

PART B. COMPLETED EVALUATIONS

The auditor used the District's Certificated Evaluation Log spreadsheets which reported 660 evaluations for the four fiscal years. The audit report disallowed 46 and approved 614 evaluations. The non-reimbursable evaluations were grouped into five categories, although the number of evaluations by type are not enumerated in the audit report:

1. Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated instructional employees.

Incorrect Reduction Claim of Carlsbad Unified School District 498/83 The Stull Act

1	The audit report (A.R., p. 15) asserts that these certificated employees are not
2	instructional personnel because:
3 4 5 6 7	The intent of this component is to evaluate the elements of classroom instruction. Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists do not provide classroom instruction and are considered "non-instructional" certificated personnel. Emphasis added.
8	The Controller is in error. The Commission has determined (SOD, p.21, 22) that
9	"certificated employees" includes all credentialed personnel involved in the education
10	process:
11 12 13 14 ; 16 17 18 19 20 21 22	As enacted, the Stull Act was placed in Chapter 2 of Division 10 of the 1971 Education Code, a chapter addressing "Certificated Employees." Certificated employees are those employees directly involved in the educational process and include both instructional and non-instructional employees such as teachers, administrators, supervisors, and principals." Certificated employees must be properly credentialed for the specific position they hold. A "certificated person" was defined in former Education Code section 12908 as "a person who holds one or more documents such as a certificate, a credential, or a life diploma, which singly or in combination license the holder to engage in the school service designated in the document or documents." The definition of "certificated person" governs the construction of Division 10 of the former Education Code and is not limited to instructional employees.
23	The Statement of Decision (18, 19) also cites Education Code section 13487,
24	which narrows the definition of noninstructional personnel as those certificated persons
25	who are supervisory and administrative personnel:
26 27 28	Former Education Code section 13487 was also repealed and reenacted by Statutes 1975, chapter 1216, as follows (amendments relevant to this issue are underlined):
29 30	(a) The governing board of each school district shall establish standards of expected student achievement at each grade level in each area of study.

- (b) The governing board of each school district shall evaluate and assess certificated employee competency as it reasonably relates to (1) the progress of students toward the established standards, (2) the performance of those noninstructional duties and responsibilities, including supervisory and advisory duties, as may be prescribed by the board, and (3) the establishment and maintenance of a suitable learning environment within the scope of the employee's responsibilities.
- (c) The governing board of each school district shall establish and define job responsibilities for those certificated noninstructional personnel, including, but not limited to, supervisory and administrative personnel, whose responsibilities cannot be evaluated appropriately under the provisions of subdivision (b), and shall evaluate and assess the competency of such noninstructional employees as it reasonably relates to the fulfillment of those responsibilities. . . .
- Without foundation in fact or law, the Controller has determined that certificated personnel who are not supervisors or administrators are also not "instructional" personnel because they may not provide full time classroom instruction. The Stull Act does not make this distinction and neither did the Commission. It has not been established as a matter of law that involvement in the educational process requires a "classroom."
- 2. Preschool teachers do not perform the requirements of the program.
- The audit report (A.R., p. 15) excludes preschool teachers in general based on the Controller's opinion that preschool teachers do not perform the requirements of an educational program *mandated by state or federal law*. The parameters and guidelines (p. 3) state that:
 - The Commission further found that the activities listed above do not constitute reimbursable state-mandated programs with respect to certificated personnel employed in local, discretionary educational programs.

- The Commission (SOD, p. 11) identified the voluntary programs in footnote 42 and preschool is not included in that enumeration. In addition, the Stull Act only explicitly excluded (SOD 17, 18) community college certificated employees, hourly adult education instructors, and hourly and temporary certificated employees and substitute teachers, but at the discretion of the local governing board. There is no stated basis to exclude certificated preschool instructors.
 - 3. Duplicate teacher evaluations claimed multiple times in one school year.

The District concurs that for purposes of the Stull Act reimbursement only one complete evaluation should be counted for each probationary employee in one school year and does not dispute these properly disallowed evaluations, if any.

4. Permanent biannual teacher evaluations claimed every year rather than every other year.

The District concurs that for purposes of the Stull Act reimbursement only one complete evaluation should be counted every other year for each employee after the employee attains permanent status and does not dispute these properly disallowed evaluations, if any.

 Permanent five-year teacher evaluations claimed multiple times in a five-year period rather than once every five years.

The District concurs that for purposes of the Stull Act reimbursement only one complete evaluation should be counted for each permanent employee every fifth year after the employee attains fifth-year permanent status and does not dispute these

1 properly disallowed evaluations, if any.

PART C. CALCULATION OF TRAINING COSTS

The audited calculation of the allowable training cost reduced the amounts claimed by \$889. The District does not dispute this adjustment.

PART VIII. RELIEF REQUESTED

The District filed its annual reimbursement claims within the time limits prescribed by the Government Code. The amounts claimed by the District for reimbursement of the costs of implementing the program imposed by Statutes 1983, Chapter 498, and Statutes 1999, Chapter 4, and relevant Education Code Sections, represent the actual costs incurred by the District to carry out this program. These costs were properly claimed pursuant to the Commission's parameters and guidelines. Reimbursement of these costs is required under Article XIIIB, Section 6 of the California Constitution. The Controller denied reimbursement without any basis in law or fact. The District has met its burden of going forward on this claim by complying with the requirements of Section 1185.1, Title 2, California Code of Regulations. Because the Controller has enforced and is seeking to enforce these adjustments without benefit of statute or regulation, the burden of proof is now upon the Controller to establish a legal basis for its actions.

The District requests that the Commission make findings of fact and law on each and every adjustment made by the Controller and each and every procedural and jurisdictional issue raised in this claim, and order the Controller to correct its audit report

Incorrect Reduction Claim of Carlsbad Unified School District 498/83 The Stull Act 1 findings therefrom. 2 PART IX. CERTIFICATION By my signature below, I hereby declare, under penalty of perjury under the laws 3 4 of the State of California, that the information in this incorrect reduction claim submission is true and complete to the best of my own knowledge or information or 5 belief, and that the attached documents are true and correct copies of documents 6 7 received from or sent by the state agency which originated the document. 8 Executed on June <u>2</u> 2015, at Carlsbad, California, by 9 Suzanne O'Connell, Deputy Superintendent 10 11 Administrative Services 12 Carlsbad Unified School District 13 6225 El Camino Real Carlsbad, CA 92009-1604 14 Voice: 760-331-5036 15 15 Fax: 760-331-5094 E-Mail: soconnell@carlsbadusd.net 18 APPOINTMENT OF REPRESENTATIVE 19 Carlsbad Unified School District appoints Keith B. Petersen, SixTen and 20 Associates, as its representative for this incorrect reduction claim. Suranne Honnell 21 Suzanne O'Oonnell, Deputy Superintendent 22 Date 23 Administrative Services Carlsbad Unified School District 24 25 Attachments: 26 Exhibit "A" Controller's "results of review" letters July 13, 2012

Parameters and guidelines September 27, 2005 Controller's claiming Instructions December 12, 2005

Annual claims FY 2005-06, 2006-07, 2007-08, and 2008-09

Controller's audit report dated June 15, 2012

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Exhibit "B"

Exhibit "C"

Exhibit "D"

Exhibit "E"

22 Exhibit A



)JOHN CHIANG

California State Controller Pibision of Accounting and Reporting JULY 13, 2012 RECEIVED

CUSO ACCOUNTING

BOARD OF TRUSTEES CARLSBAD UNIFIED SCHOOL DIST SAN DIEGO COUNTY 6225 EL CAMINO REAL CARLSBAD CA 92009

2012 JUL 16 A 11:41'

RECEIVED

JUL 16 2012

FISCAL SERVICES

DEAR CLAIMANT:

RE: THE STULL ACT

: 498/83-S

WE HAVE REVIEWED YOUR 2005/2006 FISCAL YEAR REIMBURSEMENT CLAIM FOR THE MANDATED COST PROGRAM REFERENCED ABOVE. THE RESULTS OF OUR REVIEW ARE AS FOLLOWS:

AMOUNT CLAIMED

105,192.00

ADJUSTMENT TO CLAIM:

FIELD AUDIT FINDINGS

45,637.00

TOTAL ADJUSTMENTS

45,637.00

AMOUNT DUE CLAIMANT

59,555,00

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT VAL CHULUUNJAV AT (916) 323-0734 OR IN WRITING AT THE STATE CONTROLLER'S OFFICE, DIVISION OF ACCOUNTING AND REPORTING, P.O. BOX 942850, SACRAMENTO, CA 94250-5875. DUE TO INSUFFICIENT APPROPRIATION, THE BALANCE DUE WILL BE FORTHCOMING WHEN ADDITIONAL FUNDS ARE MADE AVAILABLE.

2005-06

SINCERELY,

OHN CHIANG

\$370 00260 2012/07/13

California State Controller Division of Accounting and Reporting JULY 13, 2012

RECEIVED CUSD ACCOUNTING

BOARD OF TRUSTEES
CARLSBAD UNIFIED SCHOOL DIST 2017 JUL 16 A 11:41'
SAN DIEGO COUNTY
6225 EL CAMINO REAL
CARLSBAD CA 92009

RECEIVED
JUL 16 2012
FISCAL SERVICES

DEAR CLAIMANT:

RE: THE STULL ACT

: 498/83-S

WE HAVE REVIEWED YOUR 2006/2007 FISCAL YEAR REIMBURSEMENT CLAIM FOR THE MANDATED COST PROGRAM REFERENCED ABOVE. THE RESULTS OF OUR REVIEW ARE AS FOLLOWS:

AMOUNT CLAIMED

168,221.00

ADJUSTMENT TO CLAIM:

FIELD AUDIT FINDINGS

124,851.00

TOTAL ADJUSTMENTS

124,851.00

AMOUNT DUE CLAIMANT

43,370.00

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT VAL CHULUUNJAV AT (916) 323-0734 OR IN WRITING AT THE STATE CONTROLLER'S OFFICE, DIVISION OF ACCOUNTING AND REPORTING, P.O. BOX 942850, SACRAMENTO, CA 94250-5875. DUE TO INSUFFICIENT APPROPRIATION, THE BALANCE DUE-WILL BE FORTHCOMING WHEN ADDITIONAL FUNDS ARE MADE AVAILABLE.

2006-07

SINCERELY,

OHN CHIANG

\$37(0026 2012/07/13

California State Controller

Bibision of Accounting and Reporting

JULY 13, 2012

RECEIVED

RECOUNTING

BOARD OF TRUSTEES
CARLSBAD UNIFIED SCHOOL DIST 2012 JUL 16 A 11:41'
SAN DIEGO COUNTY
6225 EL CAMINO REAL
CARLSBAD CA 92009

RECEIVED

JUL 1 6 2012

DEAR CLAIMANT:

FISCAL SERVICES

RE: THE STULL ACT

: 498/83-S

WE HAVE REVIEWED YOUR 2007/2008 FISCAL YEAR REIMBURSEMENT CLAIM FOR THE MANDATED COST PROGRAM REFERENCED ABOVE. THE RESULTS OF OUR REVIEW ARE AS FOLLOWS:

AMOUNT CLAIMED

136,502.00

ADJUSTMENT TO CLAIM:

FIELD AUDIT FINDINGS

60,859.00

TOTAL ADJUSTMENTS

60,859.00

AMOUNT DUE CLAIMANT

75,643.00

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT VAL CHULUUNJAV AT (916) 323-0734 OR IN WRITING AT THE STATE CONTROLLER'S OFFICE, DIVISION OF ACCOUNTING AND REPORTING, P.O. BOX 942850, SACRAMENTO, CA 94250-5875. DUE TO INSUFFICIENT APPROPRIATION, THE BALANCE DUE WILL BE FORTHCOMING WHEN ADDITIONAL FUNDS ARE MADE AVAILABLE.

2007 -08

SINCERELY,



OHN CHIANG

Talifornia State Controller Pibision of Accounting and Reporting JULY 13, 2012

RECEIVED CUSO ACCOUNTING

BOARD OF TRUSTEES CARLSBAD UNIFIED SCHOOL DIST SAN DIEGO COUNTY 6225 EL CAMINO REAL CARLSBAD CA 92009

2017 JUL 16 A 11: 41 "

RECEIVED

JUL 16 2012

DEAR CLAIMANT:

FISCAL SERVICES

RE: THE STULL ACT

: 498/83-S

WE HAVE REVIEWED YOUR 2008/2009 FISCAL YEAR REIMBURSEMENT CLAIM FOR THE MANDATED COST PROGRAM REFERENCED ABOVE. THE RESULTS OF OUR REVIEW ARE AS FOLLOWS:

.AMOUNT CLAIMED

102,846.00

TOTAL ADJUSTMENTS (DETAILS BELOW)

42,754.00

TOTAL PRIOR PAYMENTS (DETAILS BELOW)

-89,625.00

AMOUNT DUE STATE

29,533.00

PLEASE REMIT A WARRANT IN THE AMOUNT OF \$ 29,533.00 WITHIN 30 DAYS FROM THE DATE OF THIS LETTER, PAYABLE TO THE STATE CONTROLLER'S OFFICE, DIVISION OF ACCOUNTING AND REPORTING, P.O. BOX 942850, SACRAMENTO, CA 94250-5875 WITH A COPY OF THIS LETTER. FAILURE TO REMIT THE AMOUNT DUE WILL RESULT IN OUR OFFICE PROCEEDING TO OFFSET THE AMOUNT FROM THE NEXT PAYMENTS DUE TO YOUR AGENCY FOR STATE MANDATED COST PROGRAMS.

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT VAL CHULUUNJAV AT (916) 323-0734 OR IN WRITING AT THE ABOVE ADDRESS.

ADJUSTMENT TO CLAIM: FIELD AUDIT FINDINGS TOTAL ADJUSTMENTS PRIOR PAYMENTS:

42,754.00

42,754.00

SCHEDULE NO. MA03125A
PAID 01-25-2011
SCHEDULE NO. MA04209A
PAID 12-06-2010
TOTAL PRIOR PAYMENTS MA03125A

-7,077.00

-82,548.00

-89,625.00

2008-09

SINCERELY,

PARAMETERS AND GUIDELINES

Education Code Sections 44660-44665 (Former Ed. Code, §§ 13485-13490)

Statutes 1983, Chapter 498 Statutes 1999, Chapter 4

The Stull Act (98-TC-25)

Denair Unified School District and Grant Joint Union High School District, Claimants

I. SUMMARY OF THE MANDATE

On May 27, 2004, the Commission on State Mandates (Commission) adopted the Statement of Decision for *The Stull Act* test claim. The Commission found that Education Code sections 44660-44665 (formerly Ed. Code, §§ 13485-13490) constitute a new program or higher level of service and impose a state-mandated program upon school districts within the meaning of article XIII B, section 6 of the California Constitution and Government Code section 17514. Accordingly, the Commission approved this test claim for the following reimbursable activities:

• Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives. (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498.)

Reimbursement for this activity is limited to the review of the employee's instructional techniques and strategies and adherence to curricular objectives, and to include in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:

- Once each year for probationary certificated employees;
- o Every other year for permanent certificated employees; and
- O Beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests. (Ed. Code, § 44662, subd. (b), as amended by Stats. 1999, ch. 4.)

Reimbursement for this activity is limited to the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that

teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- Once each year for probationary certificated employees;
- o Every other year for permanent certificated employees; and
- O Beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- Assess and evaluate permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year). The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district. (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498.) This additional evaluation and assessment of the permanent certificated employee requires the school district to perform the following activities:
 - Evaluate and assess the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));
 - O The evaluation and assessment shall be reduced to writing. (Ed. Code, § 44663, subd. (a).) The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
 - Transmit a copy of the written evaluation to the certificated employee (Ed. Code, § 44663, subd. (a));
 - O Attach any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and

 Conduct a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a).)

The Commission further found that the activities listed above do not constitute reimbursable state-mandated programs with respect to certificated personnel employed in local, discretionary educational programs.

Finally, the Commission found that all other statutes in the test claim not mentioned above are not reimbursable state-mandated programs within the meaning of article XIII B, section 6 and Government Code section 17514.

II. ELIGIBLE CLAIMANTS

Any "school district" as defined in Government Code section 17519, except for community colleges, which incurs increased costs as a result of this mandate is eligible to claim reimbursement. Charter schools are not eligible claimants.

III. PERIOD OF REIMBURSEMENT

Government Code section 17557 states that a test claim must be submitted on or before June 30 following a given fiscal year to establish eligibility for that fiscal year. The test claim for this mandate was filed on June 30, 1999. Therefore, the costs incurred for compliance with Statutes 1983, chapter 498 are eligible for reimbursement on or after July 1, 1997. Statutes 1999, chapter 4 was an urgency statute operative March 15, 1999; therefore, costs incurred for compliance with Statutes 1999, chapter 4 are eligible for reimbursement on or after March 15, 1999.

Actual costs for one fiscal year should be included in each claim. Estimated costs for the subsequent year may be included on the same claim, if applicable. Pursuant to Government Code section 17561, subdivision (d)(1)(A), all claims for reimbursement of initial fiscal year costs shall be submitted to the State Controller within 120 days of the issuance date for the claiming instructions.

If the total costs for a given fiscal year do not exceed \$1,000, no reimbursement shall be allowed, except as otherwise allowed by Government Code section 17564.

IV. REIMBURSABLE ACTIVITIES

To be eligible for mandated cost reimbursement for any fiscal year, only actual costs may be claimed. Actual costs are those costs actually incurred to implement the mandated activities. Actual costs must be traceable and supported by source documents that show the validity of such costs, when they were incurred, and their relationship to the reimbursable activities. A source document is a document created at or near the same time the actual cost was incurred for the event or activity in question. Source documents may include, but are not limited to, employee time records or time logs, sign-in sheets, invoices, and receipts.

Evidence corroborating the source documents may include, but is not limited to, worksheets, cost allocation reports (system generated), purchase orders, contracts, agendas, and declarations. Declarations must include a certification or declaration stating, "I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing is true and correct," and must further comply with the requirements of Code of Civil Procedure section 2015.5. Evidence corroborating the source documents may include data relevant to the reimbursable

activities otherwise in compliance with local, state, and federal government requirements. However, corroborating documents cannot be substituted for source documents.

The claimant is only allowed to claim and be reimbursed for increased costs for the reimbursable activities identified below. Increased cost is limited to the cost of an activity that the claimant is required to incur as a result of the mandate.

For each eligible claimant, the following activities are reimbursable:

A. Certificated Instructional Employees

1. Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498.). (Reimbursement period begins July 1, 1997.)

Reimbursement for this activity is limited to:

- a. reviewing the employee's instructional techniques and strategies and adherence to curricular objectives, and
- b. including in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:
 - o once each year for probationary certificated employees;
 - o every other year for permanent certificated employees; and
 - o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.

Note: For purposes of claiming reimbursement, eligible claimants must identify the state or federal law mandating the educational program being performed by the certificated instructional employees.

2. Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Ed. Code, § 44662, subd. (b), as amended by Stats. 1999, ch. 4.). (*Reimbursement period begins March 15, 1999*.)

Reimbursement for this activity is limited to:

- a. reviewing the results of the Standardized Testing and Reporting test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and
- b. including in the written evaluation of those certificated employees the assessment of the employee's performance based on the Standardized Testing and Reporting

results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- o once each year for probationary certificated employees;
- o every other year for permanent certificated employees; and
- o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.

B. Certificated (Instructional and Non-Instructional) Employees

1. Evaluate and assess permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year). The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498). (Reimbursement period begins July 1, 1997.)

This additional evaluation and assessment of the permanent certificated employee requires the school district to perform the following activities:

- a. evaluating and assessing the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));
- b. reducing the evaluation and assessment to writing (Ed. Code, § 44663, subd. (a)). The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
- c. transmitting a copy of the written evaluation to the certificated employee (Ed. Code, § 44663, subd. (a));
- d. attaching any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and

e. conducting a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a)).

Note: For purposes of claiming reimbursement, eligible claimants must identify the state or federal law mandating the educational program being performed by the certificated, instructional and non-instructional, employees.

C. Training

1. Train staff on implementing the reimbursable activities listed in Section IV of these parameters and guidelines. (One-time activity for each employee.) (*Reimbursement period begins July 1, 1997.*)

V. CLAIM PREPARATION AND SUBMISSION

Each of the following cost elements must be identified for each reimbursable activity identified in Section IV, Reimbursable Activities, of this document. Each claimed reimbursable cost must be supported by source documentation as described in Section IV. Additionally, each reimbursable claim must be filed in a timely manner.

A. <u>Direct Cost Reporting</u>

Direct costs are those costs incurred specifically for the reimbursable activities. The following direct costs are eligible for reimbursement.

1. Salaries and Benefits

Report each employee implementing the reimbursable activities by name, job classification, and productive hourly rate (total wages and related benefits divided by productive hours). Describe the specific reimbursable activities performed and the hours devoted to each reimbursable activity performed.

2. Materials and Supplies

Report the cost of materials and supplies that have been consumed or expended for the purpose of the reimbursable activities. Purchases shall be claimed at the actual price after deducting discounts, rebates, and allowances received by the claimant. Supplies that are withdrawn from inventory shall be charged on an appropriate and recognized method of costing, consistently applied.

3. Contracted Services

Report the name of the contractor and services performed to implement the reimbursable activities. Attach a copy of the contract to the claim. If the contractor bills for time and materials, report the number of hours spent on the activities and all costs charged. If the contract is a fixed price, report the dates when services were performed and itemize all costs for those services.

4. Fixed Assets and Equipment

Report the purchase price paid for fixed assets and equipment (including computers) necessary to implement the reimbursable activities. The purchase price includes taxes, delivery costs, and installation costs. If the fixed asset or equipment is also used for purposes other than the reimbursable activities, only the pro-rata portion of the purchase price used to implement the reimbursable activities can be claimed.

5. Travel

Report the name of the employee traveling for the purpose of the reimbursable activities. Include the date of travel, destination point, the specific reimbursable activity requiring travel, and related travel expenses reimbursed to the employee in compliance with the rules of the local jurisdiction. Report employee travel time according to the rules of cost element A.1. Salaries and Benefits, for each applicable reimbursable activity.

6. Training

Report the cost of training an employee to perform the reimbursable activities, as specified in Section IV of this document. Report the name and job classification of each employee preparing for, attending, and/or conducting training necessary to implement the reimbursable activities. Provide the title, subject, and purpose (related to the mandate of the training session), dates attended, and location. If the training encompasses subjects broader than the reimbursable activities, only the pro-rata portion can be claimed. Report employee training time for each applicable reimbursable activity according to the rules of cost element A. 1, Salaries and Benefits, and A.2, Materials and Supplies. Report the cost of consultants who conduct the training according to the rules of cost element A.3, Contracted Services.

B. Indirect Cost Rates

Indirect costs are costs that have been incurred for common or joint purposes. These costs benefit more than one cost objective and cannot be readily identified with a particular final cost objective without effort disproportionate to the results achieved. After direct costs have been determined and assigned to other activities, as appropriate, indirect costs are those remaining to be allocated to benefited cost objectives. A cost may not be allocated as an indirect cost if any other cost incurred for the same purpose, in like circumstances, has been claimed as a direct cost.

Indirect costs include: (a) the indirect costs originating in each department or agency of the governmental unit carrying out state mandated programs, and (b) the costs of central governmental services distributed through the central service cost allocation plan and not otherwise treated as direct costs.

School districts must use the J-380 (or subsequent replacement) nonrestrictive indirect cost rate provisionally approved by the California Department of Education.

County offices of education must use the J-580 (or subsequent replacement) nonrestrictive indirect cost rate provisionally approved by the California Department of Education.

VI. RECORD RETENTION

Pursuant to Government Code section 17558.5, subdivision (a), a reimbursement claim for actual costs filed by a local agency or school district pursuant to this chapter¹ is subject to the initiation of an audit by the State Controller no later than three years after the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a claimant for the program for the fiscal year for which the claim is filed, the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim. All documentation used to support the reimbursable

¹ This refers to Title 2, division 4, part 7, chapter 4 of the Government Code.

activities, as described in Section IV, must be retained during the period subject to audit. If an audit has been initiated by the Controller during the period subject to audit, the retention period is extended until the ultimate resolution of any audit findings.

VII. OFFSETTING SAVINGS AND REIMBURSEMENTS

Any offsetting savings the claimant experiences in the same program as a result of the same statutes or executive orders found to contain the mandates shall be deducted from the costs claimed. In addition, reimbursement for this mandate from any source, including, but not limited to, service fees collected, federal funds, and other state funds shall be identified and deducted from this claim.

VIII. STATE CONTROLLER'S CLAIMING INSTRUCTIONS

Pursuant to Government Code section 17558, subdivision (b), the Controller shall issue claiming instructions for each mandate that requires state reimbursement no later than 60 days after receiving the adopted parameters and guidelines from the Commission, to assist local agencies and school districts in claiming costs to be reimbursed. The claiming instructions shall be derived from the statute, regulations, or executive order creating the mandate and the parameters and guidelines adopted by the Commission.

Pursuant to Government Code section 17561, subdivision (d)(1), issuance of the claiming instructions shall constitute notice of the right of local agencies and schools districts to file reimbursement claims, based upon parameters and guidelines adopted by the Commission.

IX. REMEDIES BEFORE THE COMMISSION

Upon request of a local agency or school district, the Commission shall review the claiming instructions issued by the State Controller or any other authorized state agency for reimbursement of mandated costs pursuant to Government Code section 17571. If the Commission determines that the claiming instructions do not conform to the parameters and guidelines, the Commission shall direct the Controller to modify the claiming instructions and the Controller shall modify the claiming instructions to conform to the parameters and guidelines as directed by the Commission.

In addition, requests may be made to amend parameters and guidelines pursuant to Government Code section 17557, subdivision (d), and California Code of Regulations, title 2, section 1183.2.

X. LEGAL AND FACTUAL BASIS FOR THE PARAMETERS AND GUIDELINES

The Statement of Decision is legally binding on all parties and provides the legal and factual basis for the parameters and guidelines. The support for the legal and factual findings is found in the administrative record for the test claim. The administrative record, including the Statement of Decision, is on file with the Commission.

OFFICE OF THE STATE CONTROLLER

STATE MANDATED COSTS CLAIMING INSTRUCTIONS NO. 2005-12

THE STULL ACT

December 12, 2005

In accordance with Government Code Section (GC §) 17561, eligible claimants may submit claims to the State Controller's Office (SCO) for reimbursement of costs incurred for state mandated cost programs. The following are claiming instructions and forms that eligible claimants will use for the filing of claims for the Stull Act program. These claiming instructions are issued subsequent to adoption of the program's Parameters and Guidelines (P's & G's) by the Commission on State Mandates (COSM).

On May 27, 2004, the COSM determined that Education Code Sections 44660 to 44665 (formerly Ed. Code §§ 13485 to 13490) established costs mandated by the State according to the provisions listed in the P's & G's. For your reference, the P's & G's are included as an integral part of the claiming instructions.

Eligible Claimants

Any "school district," as defined in GC§ 17519, except for community colleges, which incurs increased costs as a result of this mandate, is eligible to claim reimbursement. Charter schools are not eligible claimants.

Filing Deadlines

A. Reimbursement Claims

Initial reimbursement claims must be filed within 120 days from the issuance date of claiming instructions. Costs incurred for compliance with Chapter 498, Statutes of 1983, are eligible for reimbursement for fiscal year 1997-98 through 2004-05. Costs incurred for compliance with Chapter 4, Statutes of 1999, are eligible for reimbursement for the period March 15, 1999, to June 30, 1999, and fiscal years 1999-00 through 2004-05. Claims must be filed with the SCO and be delivered or postmarked on or before April 11, 2006. Estimated claims for fiscal year 2005-06 must be filed on or before April 11, 2006.

In order for a claim to be considered properly filed, it must include any specific supporting documentation requested in the instructions. Claims filed more than one year after the deadline or without the requested supporting documentation will not be accepted.

B. Late Penalty

1. Initial Claims

AB 3000 enacted into law on September 30, 2002, amended the late penalty assessments on initial claims. Late initial claims submitted on or after September 30, 2002, are assessed a late penalty of 10% of the total amount of the initial claims without limitation.

2. Annual Reimbursement Claims

All late annual reimbursement claims are assessed a late penalty of 10% subject to the \$1,000 limitation regardless of when the claims were filed.

C. Estimated Claims

Unless otherwise specified in the claiming instructions, school districts, are not required to provide cost schedules and supporting documents with an estimated claim if the estimated amount does not exceed the previous fiscal year's actual costs by more than 10%. Claimants can simply enter the estimated amount on form FAM-27, line (07).

However, if the estimated claim exceeds the previous fiscal year's actual costs by more than 10%, claimants must complete supplemental claim forms to support their estimated costs as specified for the program to explain the reason for the increased costs. If no explanation supporting the higher estimate is provided with the claim, it will automatically be adjusted to 110% of the previous fiscal year's actual costs. Future estimated claims filed with the SCO must be postmarked by January 15 of the fiscal year in which costs will be incurred. Claims filed timely will be paid before late claims.

Minimum Claim Cost

GC section 17564(a) provides that no claim shall be filed pursuant to Sections 17551 and 17561, unless such a claim exceeds one thousand dollars (\$1,000).

Reimbursement of Claims

To be eligible for mandated cost reimbursement for any fiscal year, only actual costs may be claimed. Actual costs are those costs actually incurred to implement the mandated activities. Actual costs must be traceable and supported by source documents that show the validity of such costs, when they were incurred, and their relationship to the reimbursable activities. A source document is a document created at or near the same time the actual cost was incurred for the event or activity in question.

Source documents may include, but are not limited to, employee time records or time logs, signin sheets, invoices, and receipts. Evidence corroborating the source documents may include, but is not limited to, worksheets, cost allocation reports (system generated), purchase orders, contracts, agendas, training packets, and declarations. Evidence corroborating the source documents may include data relevant to the reimbursable activities otherwise in compliance with local, state, and federal government requirements. However, corroborating documents cannot be substituted for source documents.

Certification of Claim

In accordance with the provisions of GC§ 17561, an authorized representative of the claimant shall be required to provide a certification of claim stating: "I certify, (or declare), under penalty of perjury under the laws of the State of California that the foregoing is true and correct," and must further comply with the requirements of the Code of Civil Procedure Section 2015.5, for those costs mandated by the State and contained herein.

Audit of Costs

All claims submitted to the SCO are reviewed to determine if costs are related to the mandate, are reasonable and not excessive, and the claim was prepared in accordance with the SCO's claiming instructions and the P's & G's adopted by the COSM. If any adjustments are made to a claim, a "Notice of Claim Adjustment" specifying the claim component adjusted, the amount adjusted, and the reason for the adjustment, will be mailed within 30 days after payment of the claim.

Pursuant to GC§ 17558.5, subdivision (a), a reimbursement claim for actual costs filed by a school district pursuant to this chapter is subject to the initiation of an audit by the SCO no later than three years after the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a claimant for the program for the fiscal year for which the claim is filed, the time for the SCO to initiate an audit shall commence to run from the date of initial payment of the claim.

In any case, an audit shall be completed not later than two years after the date that the audit is commenced. All documents used to support the reimbursable activities must be retained during the period subject to audit. If an audit has been initiated by the SCO during the period subject to audit, the retention period is extended until the ultimate resolution of any audit findings. On-site audits will be conducted by the SCO as deemed necessary.

Retention of Claiming Instructions

The claiming instructions and forms in this package should be retained permanently in your Mandated Cost Manual for future reference and use in filing claims. These forms should be duplicated to meet your filing requirements. You will be notified of updated forms or changes to claiming instructions as necessary.

Questions or requests for hard copies of these instructions should be faxed to Ginny Brummels at (916) 323-6527, or e-mailed to LRSDAR@sco.ca.gov. Or, if you wish, you may call the Local Reimbursements Section at (916) 324-5729.

For your reference, these and future mandated costs claiming instructions and forms can be found on the Internet at <a href="www.sco.ca.gov/ard/local/

Address for Filing Claims

Claims should be rounded to the nearest dollar. Submit a signed original and a copy of form FAM-27, Claim for Payment, and all other forms and supporting documents. (To expedite the payment process, please sign the form in blue ink, and attach a copy of the form FAM-27 to the top of the claim package.)

Use the following mailing addresses:

If delivered by U.S. Postal Service:

Office of the State Controller Attn: Local Reimbursements Section Division of Accounting and Reporting P.O. Box 942850 Sacramento, CA 94250 If delivered by other delivery services:

Office of the State Controller Attn: Local Reimbursements Section Division of Accounting and Reporting 3301 C Street, Suite 500 Sacramento, CA 95816

PARAMETERS AND GUIDELINES

Education Code Sections 44660-44665 (Former Ed. Code, §§ 13485-13490)

Statutes 1983, Chapter 498 Statutes 1999, Chapter 4

The Stull Act (98-TC-25)

Denair Unified School District and Grant Joint Union High School District, Claimants

I. SUMMARY OF THE MANDATE

On May 27, 2004, the Commission on State Mandates (Commission) adopted the Statement of Decision for *The Stull Act* test claim. The Commission found that Education Code sections 44660-44665 (formerly Ed. Code, §§ 13485-13490) constitute a new program or higher level of service and impose a state-mandated program upon school districts within the meaning of article XIII B, section 6 of the California Constitution and Government Code section 17514. Accordingly, the Commission approved this test claim for the following reimbursable activities:

- Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives. (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498.)
 - Reimbursement for this activity is limited to the review of the employee's instructional techniques and strategies and adherence to curricular objectives, and to include in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:
 - Once each year for probationary certificated employees;
 - o Every other year for permanent certificated employees; and
 - o Beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests. (Ed. Code, § 44662, subd. (b), as amended by Stats. 1999, ch. 4.)
 - Reimbursement for this activity is limited to the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that

teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- Once each year for probationary certificated employees;
- o Every other year for permanent certificated employees; and
- O Beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- Assess and evaluate permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year). The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district. (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498.) This additional evaluation and assessment of the permanent certificated employee requires the school district to perform the following activities:
 - o Evaluate and assess the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));
 - o The evaluation and assessment shall be reduced to writing. (Ed. Code, § 44663, subd. (a).) The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
 - Transmit a copy of the written evaluation to the certificated employee (Ed. Code, § 44663, subd. (a));
 - o Attach any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and

 Conduct a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a).)

The Commission further found that the activities listed above do not constitute reimbursable state-mandated programs with respect to certificated personnel employed in local, discretionary educational programs.

Finally, the Commission found that all other statutes in the test claim not mentioned above are not reimbursable state-mandated programs within the meaning of article XIII B, section 6 and Government Code section 17514.

II. ELIGIBLE CLAIMANTS

Any "school district" as defined in Government Code section 17519, except for community colleges, which incurs increased costs as a result of this mandate is eligible to claim reimbursement. Charter schools are not eligible claimants.

III. PERIOD OF REIMBURSEMENT

Government Code section 17557 states that a test claim must be submitted on or before June 30 following a given fiscal year to establish eligibility for that fiscal year. The test claim for this mandate was filed on June 30, 1999. Therefore, the costs incurred for compliance with Statutes 1983, chapter 498 are eligible for reimbursement on or after July 1, 1997. Statutes 1999, chapter 4 was an urgency statute operative March 15, 1999; therefore, costs incurred for compliance with Statutes 1999, chapter 4 are eligible for reimbursement on or after March 15, 1999.

Actual costs for one fiscal year should be included in each claim. Estimated costs for the subsequent year may be included on the same claim, if applicable. Pursuant to Government Code section 17561, subdivision (d)(1)(A), all claims for reimbursement of initial fiscal year costs shall be submitted to the State Controller within 120 days of the issuance date for the claiming instructions.

If the total costs for a given fiscal year do not exceed \$1,000, no reimbursement shall be allowed, except as otherwise allowed by Government Code section 17564.

IV. REIMBURSABLE ACTIVITIES

To be eligible for mandated cost reimbursement for any fiscal year, only actual costs may be claimed. Actual costs are those costs actually incurred to implement the mandated activities. Actual costs must be traceable and supported by source documents that show the validity of such costs, when they were incurred, and their relationship to the reimbursable activities. A source document is a document created at or near the same time the actual cost was incurred for the event or activity in question. Source documents may include, but are not limited to, employee time records or time logs, sign-in sheets, invoices, and receipts.

Evidence corroborating the source documents may include, but is not limited to, worksheets, cost allocation reports (system generated), purchase orders, contracts, agendas, and declarations. Declarations must include a certification or declaration stating, "I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing is true and correct," and must further comply with the requirements of Code of Civil Procedure section 2015.5. Evidence corroborating the source documents may include data relevant to the reimbursable

activities otherwise in compliance with local, state, and federal government requirements. However, corroborating documents cannot be substituted for source documents.

The claimant is only allowed to claim and be reimbursed for increased costs for the reimbursable activities identified below. Increased cost is limited to the cost of an activity that the claimant is required to incur as a result of the mandate.

For each eligible claimant, the following activities are reimbursable:

A. Certificated Instructional Employees

1. Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498.). (*Reimbursement period begins July 1, 1997.*)

Reimbursement for this activity is limited to:

- a. reviewing the employee's instructional techniques and strategies and adherence to curricular objectives, and
- b. including in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:
 - o once each year for probationary certificated employees;
 - o every other year for permanent certificated employees; and
 - o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.

Note: For purposes of claiming reimbursement, eligible claimants must identify the state or federal law mandating the educational program being performed by the certificated instructional employees.

2. Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Ed. Code, § 44662, subd. (b), as amended by Stats. 1999, ch. 4.). (Reimbursement period begins March 15, 1999.)

Reimbursement for this activity is limited to:

- a. reviewing the results of the Standardized Testing and Reporting test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and
- b. including in the written evaluation of those certificated employees the assessment of the employee's performance based on the Standardized Testing and Reporting

results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- o once each year for probationary certificated employees;
- o every other year for permanent certificated employees; and
- o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.

B. Certificated (Instructional and Non-Instructional) Employees

1. Evaluate and assess permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year). The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498). (Reimbursement period begins July 1, 1997.)

This additional evaluation and assessment of the permanent certificated employee requires the school district to perform the following activities:

- a. evaluating and assessing the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));
- b. reducing the evaluation and assessment to writing (Ed. Code, § 44663, subd. (a)). The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
- c. transmitting a copy of the written evaluation to the certificated employee (Ed. Code, § 44663, subd. (a));
- d. attaching any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and

e. conducting a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a)).

Note: For purposes of claiming reimbursement, eligible claimants must identify the state or federal law mandating the educational program being performed by the certificated, instructional and non-instructional, employees.

C. Training

1. Train staff on implementing the reimbursable activities listed in Section IV of these parameters and guidelines. (One-time activity for each employee.) (*Reimbursement period begins July 1, 1997.*)

V. CLAIM PREPARATION AND SUBMISSION

Each of the following cost elements must be identified for each reimbursable activity identified in Section IV, Reimbursable Activities, of this document. Each claimed reimbursable cost must be supported by source documentation as described in Section IV. Additionally, each reimbursable claim must be filed in a timely manner.

A. <u>Direct Cost Reporting</u>

Direct costs are those costs incurred specifically for the reimbursable activities. The following direct costs are eligible for reimbursement.

1. Salaries and Benefits

Report each employee implementing the reimbursable activities by name, job classification, and productive hourly rate (total wages and related benefits divided by productive hours). Describe the specific reimbursable activities performed and the hours devoted to each reimbursable activity performed.

2. Materials and Supplies

Report the cost of materials and supplies that have been consumed or expended for the purpose of the reimbursable activities. Purchases shall be claimed at the actual price after deducting discounts, rebates, and allowances received by the claimant. Supplies that are withdrawn from inventory shall be charged on an appropriate and recognized method of costing, consistently applied.

3. Contracted Services

Report the name of the contractor and services performed to implement the reimbursable activities. Attach a copy of the contract to the claim. If the contractor bills for time and materials, report the number of hours spent on the activities and all costs charged. If the contract is a fixed price, report the dates when services were performed and itemize all costs for those services.

4. Fixed Assets and Equipment

Report the purchase price paid for fixed assets and equipment (including computers) necessary to implement the reimbursable activities. The purchase price includes taxes, delivery costs, and installation costs. If the fixed asset or equipment is also used for purposes other than the reimbursable activities, only the pro-rata portion of the purchase price used to implement the reimbursable activities can be claimed.

5. Travel

Report the name of the employee traveling for the purpose of the reimbursable activities. Include the date of travel, destination point, the specific reimbursable activity requiring travel, and related travel expenses reimbursed to the employee in compliance with the rules of the local jurisdiction. Report employee travel time according to the rules of cost element A.1. Salaries and Benefits, for each applicable reimbursable activity.

6. Training

Report the cost of training an employee to perform the reimbursable activities, as specified in Section IV of this document. Report the name and job classification of each employee preparing for, attending, and/or conducting training necessary to implement the reimbursable activities. Provide the title, subject, and purpose (related to the mandate of the training session), dates attended, and location. If the training encompasses subjects broader than the reimbursable activities, only the pro-rata portion can be claimed. Report employee training time for each applicable reimbursable activity according to the rules of cost element A. 1, Salaries and Benefits, and A.2, Materials and Supplies. Report the cost of consultants who conduct the training according to the rules of cost element A.3, Contracted Services.

B. Indirect Cost Rates

Indirect costs are costs that have been incurred for common or joint purposes. These costs benefit more than one cost objective and cannot be readily identified with a particular final cost objective without effort disproportionate to the results achieved. After direct costs have been determined and assigned to other activities, as appropriate, indirect costs are those remaining to be allocated to benefited cost objectives. A cost may not be allocated as an indirect cost if any other cost incurred for the same purpose, in like circumstances, has been claimed as a direct cost.

Indirect costs include: (a) the indirect costs originating in each department or agency of the governmental unit carrying out state mandated programs, and (b) the costs of central governmental services distributed through the central service cost allocation plan and not otherwise treated as direct costs.

School districts must use the J-380 (or subsequent replacement) nonrestrictive indirect cost rate provisionally approved by the California Department of Education.

County offices of education must use the J-580 (or subsequent replacement) nonrestrictive indirect cost rate provisionally approved by the California Department of Education.

VI. RECORD RETENTION

Pursuant to Government Code section 17558.5, subdivision (a), a reimbursement claim for actual costs filed by a local agency or school district pursuant to this chapter¹ is subject to the initiation of an audit by the State Controller no later than three years after the date that the actual reimbursement claim is filed or last amended, whichever is later. However, if no funds are appropriated or no payment is made to a claimant for the program for the fiscal year for which the claim is filed, the time for the Controller to initiate an audit shall commence to run from the date of initial payment of the claim. All documentation used to support the reimbursable

¹ This refers to Title 2, division 4, part 7, chapter 4 of the Government Code.

activities, as described in Section IV, must be retained during the period subject to audit. If an audit has been initiated by the Controller during the period subject to audit, the retention period is extended until the ultimate resolution of any audit findings.

VII. OFFSETTING SAVINGS AND REIMBURSEMENTS

Any offsetting savings the claimant experiences in the same program as a result of the same statutes or executive orders found to contain the mandates shall be deducted from the costs claimed. In addition, reimbursement for this mandate from any source, including, but not limited to, service fees collected, federal funds, and other state funds shall be identified and deducted from this claim.

VIII. STATE CONTROLLER'S CLAIMING INSTRUCTIONS

Pursuant to Government Code section 17558, subdivision (b), the Controller shall issue claiming instructions for each mandate that requires state reimbursement no later than 60 days after receiving the adopted parameters and guidelines from the Commission, to assist local agencies and school districts in claiming costs to be reimbursed. The claiming instructions shall be derived from the statute, regulations, or executive order creating the mandate and the parameters and guidelines adopted by the Commission.

Pursuant to Government Code section 17561, subdivision (d)(1), issuance of the claiming instructions shall constitute notice of the right of local agencies and schools districts to file reimbursement claims, based upon parameters and guidelines adopted by the Commission.

IX. REMEDIES BEFORE THE COMMISSION

Upon request of a local agency or school district, the Commission shall review the claiming instructions issued by the State Controller or any other authorized state agency for reimbursement of mandated costs pursuant to Government Code section 17571. If the Commission determines that the claiming instructions do not conform to the parameters and guidelines, the Commission shall direct the Controller to modify the claiming instructions and the Controller shall modify the claiming instructions to conform to the parameters and guidelines as directed by the Commission.

In addition, requests may be made to amend parameters and guidelines pursuant to Government Code section 17557, subdivision (d), and California Code of Regulations, title 2, section 1183.2.

X. LEGAL AND FACTUAL BASIS FOR THE PARAMETERS AND GUIDELINES

The Statement of Decision is legally binding on all parties and provides the legal and factual basis for the parameters and guidelines. The support for the legal and factual findings is found in the administrative record for the test claim. The administrative record, including the Statement of Decision, is on file with the Commission.

_;	State Controller's Off	ice				School Ma	<u>indated Cost Manual</u>
		CLAIM FOR PAYMEN				For State Controller Us	se Only Program
I	Pursuan	t to Government Code S	sectio	on 17561		(19) Program Number 00	
		THE STULL ACT				(20) Date Filed/	260
+	(01) Claimant Identification Nun	mber			_	(21) LRS Input/_	
	(02) Claimant Name					Reimbursem	ent Claim Data
						(22) SA -1, (03)(a)	
L	County of Location		_			(23) SA -1, (03)(b)	
	Street Address or P.O. Box			Suite		(24) SA -1, (04)(A)(1)(a)(f)	
Ī	City	State		Zip Code		(25) SA -1, (04)(A)(1)(b)(f)	
1	Type of Claim	Estimated Claim	F	Reimbursement Ci	aim	(26) SA -1, (04)(A)(2)(a)(f)	
		(03) Estimated	(09)	Reimbursement		(27) SA -1, (04)(A)(2)(b)(f)	
		(04) Combined	(10)	Combined		(28) SA -1, (04)(B)(1)(a)(f)	
		(05) Amended	(11)	Amended		(29) SA -1, (04)(B)(1)(b)(f)	
	Fiscal Year of Cost	(06)	(12)			(30) SA -1, (04)(B)(1)(c)(f)	
	Total Claimed Amount	(07)	(13)			(31) SA -1, (04)(B)(1)(d)(f)	
	Less: 10% Late Penalty		(14)	· · · · · · · · · · · · · · · · · · ·		(32) SA -1, (04)(B)(1)(e)(f)	
	Less: Prior Claim Paym	ent Received	(15)			(33) SA -1, (06)	
	Net Claimed Amount		(16)			(34) SA -1, (07)	
	Due from State	(08)	(17)	1		(35) SA -1, (09)	
	Due to State		(18)	· · · · · · · · · · · · · · · · · · ·		(36) SA -1, (10)	
- [(37) CERTIFICATION						
ď	file mandated cost claims	ovisions of Government Code with the State of California for ment Code Sections 1090 to 10	r this	program, and certify	ıat I am y unde	n the officer authorized b or penalty of perjury that	y the school district to I have not violated any of
	costs claimed herein, and and reimbursements set fo	was no application other than such costs are for a new prog orth in the Parameters and Gu maintained by the claimant.	gram d	or increased level of	fservic	ces of an existing progra	m. All offsetting savings
ŀ		mated Claim and/or Reimburse he attached statements. I certi rect.					
,	Signature of Authorized Offi	cer		•		Date	
Ī				-			
-	Type or Print Name			- 	·	Title	
	(38) Name of Contact Person for	or Claim		Telephone Num	nber	() -	Ext.
-				F-Mail Address			

Form FAM-27 (Revised 01/06)

Program **260**

THE STULL ACT Certification Claim Form Instructions

FORM FAM-27

- (01) Enter the payee number assigned by the State Controller's Office.
- (02) Enter your Official Name, County of Location, Street or P. O. Box address, City, State, and Zip Code.
- (03) If filing an estimated claim, enter an "X" in the box on line (03) Estimated.
- (04) If filing a combined estimated claim on behalf of districts within the county, enter an "X" in the box on line (04) Combined.
- (05) If filing an amended estimated claim, enter an "X" in the box on line (05) Amended.
- (06) Enter the fiscal year in which costs are to be incurred.
- (07) Enter the amount of the estimated claim. If the estimate exceeds the previous year's actual costs by more than 10%, complete form SA-1 and enter the amount from line (11).
- (08) Enter the same amount as shown on line (07).
- (09) If filling a reimbursement claim, enter an "X" in the box on line (09) Reimbursement.
- (10) If filling a combined reimbursement claim on behalf of districts within the county, enter an "X" in the box on line (10) Combined.
- (11) If filing an amended reimbursement claim, enter an "X " in the box on line (11) Amended.
- (12) Enter the fiscal year for which actual costs are being claimed. If actual costs for more than one fiscal year are being claimed, complete a separate form FAM-27 for each fiscal year.
- (13) Enter the amount of the reimbursement claim from SA-1, line (11). The total claimed amount must exceed \$1,000.
- (14) Reimbursement claims must be filed by April 11, 2006, for the fiscal year in which costs were incurred or the claims shall be reduced by a late penalty. Enter zero if the claim was timely filed, otherwise, enter the product of multiplying line (13) by the factor 0.10 (10% penalty).
- (15) If filing a reimbursement claim and a claim was previously filed for the same fiscal year, enter the amount received for the claim. Otherwise, enter a zero.
- (16) Enter the result of subtracting line (14) and line (15) from line (13).
- (17) If line (16), Net Claimed Amount, is positive, enter that amount on line (17), Due from State.
- (18) If Ilne (16), Net Claimed Amount, is negative, enter that amount on line (18), Due to State.
- (19) to (21) Leave blank.
- (22) to (36) Reimbursement Claim Data. Bring forward the cost information as specified on the left-hand column of lines (22) through (36) for the reimbursement claim, e.g., SA-1, (04)(A)(1)(a)(f), means the information is located on form SA-1, block (04)(A)(1), line (a), column (f). Enter the information on the same line but in the right-hand column. Cost information should be rounded to the nearest dollar, i.e., no cents. Indirect costs percentage should be shown as a whole number and without the percent symbol, i.e., 7.548% should be shown as 8. Completion of this data block will expedite the payment process.
- (37) Read the statement "Certification of Claim." If it is true, the claim must be dated, signed by the district's authorized officer, and must include the person's name and title, typed or printed. Claims cannot be paid unless accompanied by an original signed certification. (To expedite the payment process, please sign the form FAM-27 with blue ink, and attach a copy of the form FAM-27 to the top of the claim package.)
- (38) Enter the name, telephone number, and e-mail address of the person to contact if additional information is required.

SUBMIT A SIGNED ORIGINAL, AND A COPY OF FORM FAM-27, WITH ALL OTHER FORMS AND SUPPORTING DOCUMENTS TO:

Address, if delivered by U.S. Postal Service:

OFFICE OF THE STATE CONTROLLER ATTN: Local Reimbursements Section Division of Accounting and Reporting P.O. Box 942850 Sacramento, CA 94250 Address, if delivered by other delivery service:

OFFICE OF THE STATE CONTROLLER ATTN: Local Reimbursements Section Division of Accounting and Reporting 3301 C Street, Suite 500 Sacramento, CA 95816

Form FAM-27 (Revised 01/06)

ĒĽ.	te controller's Office		MANDATI	-D COSTS	<u> </u>	iooi wandateu	COSt Manda			
	Program MANDATED COSTS									
	260 THE STULL ACT CLAIM SUMMARY									
/04) Claimant		- CLAIM S		of Olains		<u> </u>			
(01) Claimant			(02) Type	or Claim bursement		Fiscal Year			
		· · · · · · · · · · · · · · · · · · ·			nated		/			
(03) (a) Number of Certific	cated Instructi	onal Employee:	s (CIE's) evalu	ated per (04)	(A)				
	(b) Number of CIE's a	and Non-Instru	uctional Employ	ees (NIE's) ev	aluated per (04)(B)				
Dir	ect Costs			Object A	ccounts					
(04	*	(a)	(b)	(c)	(d)	(e)	(f) —			
	Reimbursable Components	Salaries and	Materials and	Contract Services	Fixed Assets	Travel and	Total			
Α.	CIE's	Benefits	Supplies	<u> </u>		Training	<u>l</u>			
1.	Evaluation/Assessment - I	Ed. Code §44662	2, subd. (b), as am	ended by Ch. 49	8/83; Reimburse	ement period begi	ns fy 1997-98			
a.	Review employee's techniques and strategies									
b.	Evaluation of techniques and strategies				· · · · · · · · · · · · · · · · · · ·					
2.	Evaluation/Assessment - E	d. Code §44662	, subd. (b), as ame	ended by Ch. 4/9	9; Reimbursem	ent period begins	03/15/99			
а.	Review STAR results									
b.	Assessment per STAR									
В.	CIE's and NIE's									
1.	Evaluation/Assessment - E	d. Code §44664	, subd. (b), as ame	ended by Ch. 498	/83; Reimburse	ment period begi	ns fy 1997-98			
a.	Evaluating and assessing CIE per certain criteria									
b.	Writing evaluation									
c.	Transmitting evaluation		_							
ď	Attaching to personnel file									
е.	Discussing evaluation									
(05) Total Direct Costs					į				
Ind	irect Costs						•			
(06) Indirect Cost Rate			[From J-38	0 or J-580]		%			
(07	(07) Total Indirect Costs [Line (06) x line (05)(a)]									
(08) Total Direct and Indir	ect Costs		[Line (05)(f)	+ line (07)]					
Со	Cost Reduction									
(09) Less: Offsetting Savi	ings								
(10) Less: Other Reimbur	rsements				····				
(11	11) Total Claimed Amount [Line (08) - {line (09) + line (10)}]									

Program 260

THE STULL ACT CLAIM SUMMARY Instructions

FORM SA-1

- (01) Enter the name of the claimant.
- (02) Type of Claim. Check a box, Reimbursement or Estimated, to identify the type of claim being filed. Enter the fiscal year of costs.

Form SA-1 must be filed for a reimbursement claim. Do not complete form SA-1 if you are filing an estimated claim and the estimate does not exceed the previous fiscal year's actual costs by more than 10%. Simply enter the amount of the estimated claim on form FAM-27, line (07). However, if the estimated claim exceeds the previous fiscal year's actual costs by more than 10%, form SA-1 must be completed and a statement attached explaining the increased costs. Without this information the estimated claim will automatically be reduced to 110% of the previous fiscal year's actual costs.

- (03) Claim Statistics. (a) Enter the number of CIE's who were evaluated per (04)(A).
 - (b) Enter the number of CIE's and NIE's who were evaluated per (04)(B).
- (04) Reimbursable Components. For each reimbursable component, enter the total from form SA-2, line (05), columns (d) through (h) to form SA-1, block (04), columns (a) through (e) in the appropriate row. Total each row.
- (05) Total Direct Costs. Total columns (a) through (f).
- (06) Indirect Cost Rate. Enter the indirect cost rate from the Department of Education form J-380 or J-580 as applicable for the fiscal year of costs.
- (07) Total Indirect Costs. Enter the result of multiplying the Indirect Cost Rate, line (06), by the Total Salaries and Benefits, line (05)(a).
- (08) Total Direct and Indirect Costs. Enter the sum of Total Direct Costs, line (05)(f), and Total Indirect Costs, line (07).
- (09) Less: Offsetting Savings. If applicable, enter the total savings experienced by the claimant as a direct result of this mandate. Submit a detailed schedule of savings with the claim.
- (10) Less: Other Reimbursements. If applicable, enter the amount of other reimbursements received from any source including, but not limited to, service fees collected, federal funds, and other state funds, that reimbursed any portion of the mandated cost program. Submit a schedule detailing the reimbursement sources and amounts.
- (11) Total Claimed Amount. From Total Direct and Indirect Costs, line (08), subtract the sum of Offsetting Savings, line (09), and Other Reimbursements, line (10). Enter the remainder on this line and carry the amount forward to form FAM-27, line (07) for the Estimated Claim or line (13) for the Reimbursement Claim.

State Controller's Office **School Mandated Cost Manual MANDATED COSTS** Program **FORM** THE STULL ACT SA-2 COMPONENT/ACTIVITY COST DETAIL (01) Claimant (02) Fiscal Year (03) Reimbursable Components: Check only one box per form to identify the component being claimed. Review employee's techniques Evaluation to include assessment A. CIE and strategies of techniques and strategies Review STR Results Assessment based on STR results Evaluating and assessing CIE B. CIE & NIE Transmitting evaluation to CIE Reducing evaluation to writing according to certain criteria Attaching response to Discussing evaluation with CIE personnel file (04) Description of Expenses **Object Accounts** (b) (h) (g) (c) (d) (e) Employee Names, Job Classifications, Functions Performed Hourly Salaries Hours Materials Contract Fixed Travel Rate or Worked or and and and Services Assets and Description of Expenses **Unit Cost** Quantity Benefits Supplies Training

(05) Total New 12/05 Subtotal

Page:

of

Program **260**

THE STULL ACT COMPONENT/ACTIVITY COST DETAIL Instructions

FORM SA-2

- (01) Claimant, Enter the name of the claimant.
- (02) Fiscal Year. Enter the fiscal year for which costs were incurred.
- (03) Reimbursable Components. Check the box which indicates the cost component being claimed. Check only one box per form. A separate form SA-2 shall be prepared for each applicable component.
- Description of Expenses. The following table identifies the type of information required to support reimbursable costs. To detail costs for the component activity box "checked" in block (03), enter the employee names, position titles, a brief description of the activities performed, actual time spent by each employee, productive hourly rates, fringe benefits, supplies used, contract services, and travel and training expenses. The descriptions required in column (4)(a) must be of sufficient detail to explain the cost of activities or items being claimed. For audit purposes, all supporting documents must be retained by the claimant for a period of not less than three years after the date the claim was filed or last amended, whichever is later. If no funds were appropriated and no payment was made at the time the claim was filed, the time for the Controller to initiate an audit shall be from the date of initial payment of the claim. Such documents shall be made available to the State Controller's Office on request.

Object/ Sub object		Columns													
Accounts	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	documents with the clair						
Salaries and Benefits Salaries	Employee Name/Title	Hourly Rate	Hours Worked	Salaries = Hourly Rate x Hours Worked				\$10 mg							
Benefits	Activities Performed	Benefit Rate		Benefits = Benefit Rate x Salaries											
Materials and Supplies	Description of Supplies Used	Unit Cost	Quantity Used		Cost = Unit Cost x Quantity Used										
Contract Services	Name of Contractor Specific Tasks Performed	Hourly Rate	Hours Worked Inclusive Dates of Service			Cost=Hourly Rate x Hours Worked or Total Contract Cost			Copy of Contract and Invoices						
Fixed Assets	Description of Equipment Purchased	Unit Cost	Usage				Cost= Unit Cost x Usage								
Travel and Training	Purpose of Trip Name and Title Departure and Return Date	Per Diem Rate Mileage Rate Travel Cost	Days Miles Travel Mode			Total Travel Cost = Rate x Days or Miles		Total Travel Cost = Rate x Days or Miles							
Training	Employee Name/Title Name of Class		Dates Attended			Registration Fee		Registration Fee							

(05) Total line (04), columns (d) through (h) and enter the sum on this line. Check the appropriate box to indicate if the amount is a total or subtotal. If more than one form is needed to detail the component/activity costs, number each page. Enter totals from line (05), columns (d) through (h) to form SA-1, block (04), columns (a) through (e) in the appropriate row.

CARLSBAD UNIFIED SCHOOL DISTRICT

Audit Report

THE STULL ACT PROGRAM

Chapter 498, Statutes of 1983, and Chapter 4, Statutes of 1999

July 1, 2005, through June 30, 2009



JOHN CHIANG
California State Controller

June 2012



JOHN CHIANG California State Controller

June 15, 2012

Kelli Moors, President Board of Trustees Carlsbad Unified School District 6225 El Camino Real Carlsbad, CA 92009

Dear Ms. Moors:

The State Controller's Office audited the costs claimed by the Carlsbad Unified School District for the legislatively mandated Stull Act Program (Chapter 498, Statutes of 1983, and Chapter 4, Statutes of 1999) for the period of July 1, 2005, through June 30, 2009.

The district claimed \$512,761 for the mandated program. Our audit disclosed that \$238,660 is allowable and \$274,101 is unallowable. The costs are unallowable primarily because the district claimed reimbursement for activities not reimbursable under the mandated program. The State paid the district \$89,625. Allowable costs claimed exceed the amount paid by \$149,035.

If you disagree with the audit finding, you may file an Incorrect Claim (IRC) with the Commission on State Mandates (CSM). The IRC must be filed within three years following the date that we notify you of a claim reduction. You may obtain IRC information at the CSM's website at www.csm.ca.gov/docs/IRCForm.pdf.

If you have any questions, please contact Jim L. Spano, Chief, Mandated Cost Audits Bureau, at (916) 323-5849.

Sincerely,

Original signed by

JEFFREY V. BROWNFIELD Chief, Division of Audits

JVB/vb

cc: John A. Roach, Ed.D., Superintendent

Carlsbad Unified School District

Devin Vodicka, Assistant Superintendent, Business Services

Carlsbad Unified School District

Torrie Norton, Assistant Superintendent, Personnel Services

Carlsbad Unified School District

Nancy Navarro, Director, Fiscal Services

Carlsbad Unified School District

Mark C. Anderson, President, Board of Education

San Diego County Office of Education

Scott Hannan, Director

School Fiscal Services Division

California Department of Education

Carol Bingham, Director

Fiscal Policy Division

California Department of Education

Thomas Todd, Principal Program Budget Analyst

Education Systems Unit

Department of Finance

Jay Lal, Manager

Division of Accounting and Reporting

State Controller's Office

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Audit Report

Summary

The State Controller's Office audited the costs claimed by the Carlsbad Unified School District for the legislatively mandated Stull Act Program (Chapter 498, Statutes of 1983, and Chapter 4, Statutes of 1999) for the period of July 1, 2005, through June 30, 2009.

The district claimed \$512,761 for the mandated program. Our audit disclosed that \$238,660 is allowable and \$274,101 is unallowable. The costs are unallowable primarily because the district claimed reimbursement for activities not reimbursable under the mandated program. The State paid the district \$89,625. Allowable costs claimed exceed the amount paid by \$149,035.

Background

Chapter 498, Statutes of 1983, and Chapter 4, Statutes of 1999, added Education Code sections 44660-44665. The legislation provided specific reimbursement for activities related to evaluation and assessment of the performance of "certificated personnel" within each school district, except for those employed in local, discretionary educational programs.

On May 27, 2004, the Commission on State Mandates (CSM) determined that the legislation imposed a state mandate reimbursable under Government Code section 17514.

The program's parameters and guidelines establish the state mandate and define reimbursement criteria. The CSM adopted the parameters and guidelines on September 27, 2005. In compliance with Government Code section 17558, the SCO issues claiming instructions to assist local agencies and school districts in claiming mandated program reimbursable costs.

The Commission approved reimbursable activities as follows:

- Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal laws as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives (Education Code section 44662(b) as amended by Chapter 498, Statutes of 1983).
- Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Education Code section 44662(b) as amended by Chapter 4, Statues of 1999).
- Assess and evaluate permanent certificated, instructional, and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year).

The additional evaluations shall last until the employee archives a positive evaluation, or is separated from the school district (Education Code section 44664 as amended by Chapter 498, Statues of 1983).

Objective, Scope, and Methodology

We conducted the audit to determine whether costs claimed represent increased costs resulting from the Stull Act Program for the period of July 1, 2005, through June 30, 2009.

Our audit scope included, but was not limited to, determining whether costs claimed were supported by appropriate source documents, were not funded by another source, and were not unreasonable and/or excessive.

We conducted this performance audit under the authority of Government Code sections 12410, 17558.5, and 17561. We did not audit the district's financial statements. We conducted the audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

We limited our review of the district's internal controls to gaining an understanding of the transaction flow and claim preparation process as necessary to develop appropriate auditing procedures.

We asked the district to submit a written representation letter regarding the district's accounting procedures, financial records, and mandated cost claiming procedures as recommended by generally accepted government auditing standards. However, the district declined our request.

Conclusion

Our audit disclosed an instance of noncompliance with the requirements outlined above. This instance is described in the accompanying Summary of Program Costs (Schedule 1) and in the Finding and Recommendation section of this report.

For the audit period, the Carlsbad Unified School District claimed \$512,761 for costs of the Stull Act Program. Our audit disclosed that \$238,660 is allowable and \$274,101 is unallowable.

For the fiscal year (FY) 2005-06 claim, the State made no payment to the district. Our audit disclosed that \$59,555 is allowable. The State will pay allowable costs claimed, totaling \$59,555, contingent upon available appropriations.

For the FY 2006-07 claim, the State made no payment to the district. Our audit disclosed that \$43,370 is allowable. The State will pay allowable costs claimed, totaling \$43,370, contingent upon available appropriations.

For the FY 2007-08 claim, the State made no payment to the district. Our audit disclosed that \$75,643 is allowable. The State will pay allowable costs claimed, totaling \$75,643, contingent upon available appropriations.

For the FY 2008-09 claim, the State paid the district \$89,625. Our audit disclosed that \$60,092 is allowable. The State will offset \$29,533 from other mandated program payments due the district. Alternatively, the district may remit this amount to the State.

Views of Responsible Official

We issued a draft audit repot on May 2, 2012. Devin Vodicka, Assistant Superintendent, responded by letter dated May 9, 2012 (Attachment), disagreeing with the audit results. This final audit report includes the district's response.

Restricted Use

This report is solely for the information and use of the Carlsbad Unified School District, the San Diego County Office of Education, the California Department of Education, the California Department of Finance, and the SCO; it is not intended to be and should not be used by anyone other than these specified parties. This restriction is not intended to limit distribution of this report, which is a matter of public record.

Original signed by

JEFFREY V. BROWNFIELD Chief, Division of Audits

June 15, 2012

Schedule 1— Summary of Program Costs July 1, 2005, through June 30, 2009

Cost Elements		ctual Costs Claimed		llowable er Audit	Audit Adjustment 1		
July 1, 2005, through June 30, 2006							
Direct costs: Salaries and benefits Evaluation activities Training	\$	97,325 2,193	\$	54,081 2,193	\$ (43,244)		
Total direct costs Indirect costs		99,518 5,674		56,274 3,281	(43,244) (2,393)		
Total program costs Less amount paid by the State	\$	105,192		59,555	\$ (45,637)		
Allowable costs claimed in excess of (less than) amount paid			\$	59,555			
July 1, 2006, through June 30, 2007							
Direct costs: Salaries and benefits Evaluation activities Training	\$	155,019 2,965	\$	37,956 2,775	\$ (117,063) (190)		
Total direct costs Indirect costs		157,984 10,237		40,731 2,639	(117,253) (7,598)		
Total program costs Less amount paid by the State	<u>\$</u>	168,221		43,370	\$ (124,851)		
Allowable costs claimed in excess of (less than) amount paid			\$	43,370			
July 1, 2007, through June 30, 2008							
Direct costs: Salaries and benefits Evaluation activities Training	\$	128,560 1,640	\$	70,602 1,549	\$ (57,958) (91)		
Total direct costs Indirect costs		130,200 6,302		72,151 3,492	(58,049) (2,810)		
Total program costs Less amount paid by the State	<u>\$</u>	136,502		75,643 —	\$ (60,859)		
Allowable costs claimed in excess of (less than) amount paid			<u>\$</u>	75,643			

Schedule 1 (continued)

Cost Elements	Actual Costs Claimed		Allowable per Audit			Audit Adjustment
July 1, 2008, through June 30, 2009						
Direct costs: Salaries and benefits Evaluation activities Training	\$	96,252 608	\$	56,594 ———	\$	(39,658) (608)
Total direct costs Indirect costs		96,860 5,986		56,594 3,498		(40,266) (2,488)
Total program costs Less amount paid by the State	<u>\$</u>	102,846		60,092 (89,625)	<u>\$</u>	(42,754)
Allowable costs claimed in excess of (less than) amount paid			\$	(29,533)		
Summary: July 1, 2005, through June 30, 2009						
Direct costs: Salaries and benefits Evaluation activities Training	\$	477,156 7,406	\$	219,233 6,517	\$	(257,923) (889)
Total direct costs Indirect costs		484,562 28,199		225,750 12,910		(258,812) (15,289)
Total program costs Less amount paid by the State	<u>\$</u>	512,761		238,660 (89,625)	\$	(274,101)
Allowable costs claimed in excess of (less than) amount paid			<u>\$</u>	149,035		

¹ See the Finding and Recommendation section.

Finding and Recommendation

FINDING—
Overstated salaries
and benefits and
related indirect costs

The district claimed \$484,562 in salaries and benefits and \$28,199 in related indirect costs for the audit period. We determined that \$258,812 in salaries and benefits and \$15,289 in related indirect costs are unallowable. The costs are unallowable primarily because the district claimed reimbursement for non-mandated activities.

The following table summarizes the unallowable salaries and benefits and related indirect costs by fiscal year:

	_	2005-06	2006-07	2007-08		2008-09		Total
Direct costs								
Salaries and benefits								
Evaluation activities	\$	(43,244)	\$(117,063)	\$	(57,958)	\$	(39,658)	\$(257,923)
Training			(190)		(91)		(608)	(889)
Total salaries and					_			
benefits		(43,244)	(117,253)		(58,049)		(40,266)	(258,812)
Indirect costs	_	(2,393)	(7,598)	_	(2,810)	_	(2,488)	(15,289)
Audit adjustment	\$	(45,637)	\$(124,851)	\$	(60,859)	\$	(42,754)	\$(274,101)

Unsupported Costs

Initially, all costs claimed by the district were unallowable because they were based on average time increments supported with time records that were not completed contemporaneously.

The district developed an alternative reimbursement methodology to determine allowable costs for fiscal year (FY) 2005-06 through FY 2008-09. The district's representatives conducted a time study in FY 2010-11 as a substitute for records of actual time spent on teacher evaluations. The results were applied to the audit period.

Time Study Activities

The time study documented the time it took district evaluators to perform 22 separate activities of the teacher evaluation process. The district evaluated permanent, probationary, and temporary certificated instructional teachers. The time study results reported time for training, planning, preparation, meetings, observation, report writing, and other activities within the evaluation process.

The time study determined that it takes district evaluators an average of 10 hours and 38 minutes per teacher to complete an evaluation.

Out of the 22 activities the district identified in their time study, 19 activities are not reimbursable under the mandate. The 19 non-reimbursable activities include:

- 1. Preparing before training or planning meetings/conferences;
- 2. Training or planning meetings/conferences;

- 3. Preparing/organizing notes from training or planning meetings/conferences;
- 4. Preparing before meeting with teachers;
- 5. Conducting actual conference with teachers;
- 6. Preparing or organizing notes from meetings with teachers;
- 7. Preparing before "Pre-Observation" conferences with teachers;
- 8. Conducting "Pre-Observation" conferences with teachers;
- 9. Preparing/organizing notes from "Pre-Observation" conferences with teachers;
- 10. Preparing before classroom observations of teachers:
- 11. Preparing/organizing notes from classroom observations, finalizing Collect Data forms;
- 12. Reporting observations, preparing the Standards for Excellence in Teaching observation checklists;
- 13. Preparing before "Post-Observation" conferences with teachers;
- 14. Conducting "Post-Observation" conferences with teachers;
- 15. Preparing notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets;
- 16. Preparing before Final Evaluation conferences with teachers:
- 17. Conducting Final Evaluation conferences with teachers;
- 18. Preparing/organizing notes from Final Evaluation conferences with teachers; and
- 19. Discussing the STAR results with teachers and assessing how to improve instructional abilities.

The activities related to planning, preparation, and organizing notes are not reimbursable under the mandate.

The district duplicated costs by including training activities in its time study and again as a direct cost item in each fiscal year. Further, training time reported in the time study is not an activity repetitive in nature and is not appropriate for a time study. We determined allowable time spent on training from the district's original claims.

Conferences between the evaluators and teachers also are not reimbursable because they were required before the enactment of the test claim legislation. These activities are not imposing a new program or higher level of service. Conferences, as well as pre-, post-, final observation conferences, and conference-related activities are not reimbursable.

Out of the 22 activities identified by the district, we determined that the time spent on the following three activities is reimbursable:

- 1. Conducting "informal" classroom observations;
- 2. Conducting "formal" classroom observations;
- 3. Writing Final Evaluation Reports and/or preparing Teacher Evaluation Report.

Based on the time study results, we concluded that it takes district evaluators an average of 5 hours and 8 minutes per teacher evaluation to complete allowable activities within the evaluation process.

Completed Evaluations

The district used Certificated Evaluation Log spreadsheets to keep track of completed evaluations sent to the Carlsbad Unified School District Personnel Services Department. We reviewed the Evaluation Logs for each fiscal year to ensure that only eligible evaluations were counted for reimbursement. The program's parameters and guidelines allow reimbursement for those evaluations conducted for certificated instructional personnel who perform the requirements of educational programs mandated by state or federal law during specific evaluation periods.

The following table shows evaluations identified in the time study that are not reimbursable under the mandated program:

	N	Number of Evaluatio	ns
	Per Time	Allowable	
Fiscal Year	Study	per Audit	Adjustments
2005-06	178	160	(18)
2006-07	112	106	(6)
2007-08	209	201	(8)
2008-09	161	<u>147</u>	(14)
Totals	660	614	<u>(46)</u>

The non-reimbursable evaluations included the following:

- Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated instructional employees;
- Preschool teachers who do not perform the requirements of the program that is mandated by state or federal law;
- Duplicate teacher evaluations claimed multiple times in one school year;
- Permanent biannual teacher evaluations claimed every year rather than every other year; and
- Permanent five-year teacher evaluations claimed multiple times in a five-year period rather than once every five years.

Calculation of Allowable Evaluation Costs

To arrive at allowable salaries and benefits in each fiscal year, we multiplied the number of allowable evaluations by allowable hours per evaluation and average productive hourly rates (PHR).

The following table summarizes the calculations by fiscal year.

	_2	.005-06		2006-07		2007-08		2008-09	Total
(A) Allowable evaluations(B) Allowable hours		160		106		201		147	
per evaluation	×	5.14	×	5.14		5.14		5.14	
(C) Total annual hours [(A) × (B)] (D) Average PHR	×	822.4 \$65.76	×	544.8 \$69.67		1,033.1 \$68.34	×	755.6 \$74.90	
Total evaluation salaries and benefits [(C) × (D)]	\$	54,081	\$	37,956	\$	70,602	<u>\$</u>	56,594	\$ 219,233

We then applied the applicable indirect cost rates to allowable salaries and benefits to calculate the allowable indirect costs for this component.

Calculation of Allowable Training Costs

The district's original claims reported training hours in each fiscal year. The parameters and guidelines only allow training costs as a one-time activity per employee. We concluded that \$6,517 out of the \$7,406 claimed in training costs is reimbursable under the mandate. The unallowable training costs included duplicate training hours for the same employees.

The following table summarizes claimed, allowable, and unallowable training costs by fiscal year:

	2	2005-06		2006-07		2007-08		2008-09		Total
Claimed	\$	2,193	\$	2,965	\$	1,640	\$	608	\$	7,406
Allowable		2,193		2,775		<u>1,549</u>				6,517
Audit adjustment	\$		\$	(190)	\$	(91)	\$	(608)	<u>\$</u>	(889)

For FY 2005-06, the district claimed training costs in the Travel and Training reimbursable component. We reclassified the district's training costs to Salaries and Benefits.

The program's parameters and guidelines (section IV.A.1) state that the following is reimbursable:

Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives.

Reimbursement for this activity is limited to:

- a. Reviewing the employee's instructional techniques and strategies and adherence to curricular objectives, and
- b. Including in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:
 - o Once each year for probationary certificated employees;
 - o Every other year for permanent certificated employees; and
 - o Beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified, and whose previous evaluation rates the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.

The parameters and guidelines (section IV.C-Training) state the district may train staff on implementing the reimbursable activities listed in Section IV of the parameters and guidelines. (One-time activity for each employee.)

The parameters and guidelines (section IV-Reimbursable Activities) also state:

To be eligible for mandated cost reimbursement for any fiscal year, only actual costs may be claimed. Actual costs are those costs actually incurred to implement the mandated activities. Actual costs must be traceable and supported by source documents that show the validity of such costs, when they were incurred, and their relationship to the reimbursable activities. A source document is a document created at or near the same time the actual cost was incurred for the event or activity in question. Source documents may include, but are not limited to, employee time records or time logs, sign-in sheets, invoices, and receipts.

Recommendation

We recommend that the district ensure that claimed costs are based on actual costs, are for activities reimbursable under the program's parameters and guidelines, and are supported by contemporaneous source documentation.

District's Response

Time Study Activities

... the District prepared a time-study based on the FY 2010-11 certificated staff evaluation cycle. The time study identified 22 discrete activities based on staff interviews. Actual time spent on these activities was collected from the employees involved. An average time spent for each of these activities was calculated. These average times per activity were assigned to a relevant job title or group of titles for purposes of

determining the appropriate productive hourly rate to be applied to each activity. However, the audit report allows only 3 of the 22 time study activities.

3 Activities Allowed

- 1. Conducting "informal" classroom observations
- 2. Conducting "formal" classroom observations
- 3. Writing Final Evaluation Reports and/or preparing Teacher Evaluation Report

19 Disallowed Activities

The remaining 19 activities were not approved for reimbursement. These can be grouped into three categories:

Preparation activities: The audit report disallows activities related to planning, preparation, and organizing of notes for the evaluations, because these activities are "not reimbursable under the mandate." The audit report does not provide a legal citation or other source for this conclusion. Preparation is a reasonable and necessary part of implementing the evaluation mandate.

Training: The audit report concludes that training time is not a proper subject for a time study of repetitive activities. Instead, the audit report allows most of the training costs as direct costs, based on the District's original claim documentation. The adjustment amount is \$889 based on the direct cost method. The training time included in the time study was intended to pertain to the annual repetitive process to train evaluators for the annual evaluation cycle. However, due to the parameters and guidelines limitation that training costs not be duplicated for any one employee, the direct cost method is a reasonable method of preventing duplication of these costs.

Evaluation Conferences: The audit report concludes that conferences between the evaluators and teachers are unallowable "because they were required before the enactment of the test claim legislation." The audit report does not provide a legal citation or other source for this threshold conclusion that conferences were previously required by law. The mandate reimburses the new program requirement to "evaluate and assess" which necessarily involves a comprehensive process. The classroom observations are one part of a continuum of evaluation and assessment steps, none of which individually completes the mandate. The conferences and related tasks are effective and efficient methods to evaluate and assess employees and necessary to communicate the findings of the evaluation to the employee. Whether the conferences in general were required as a matter of law before the Stull Act is a decision for the Commission pursuant to a future incorrect reduction claim. Even if conferences were part of previous evaluation procedures. either by law or practice, the subject matter of these conferences is now different as a result of the Stull Act.

Disallowed evaluations

There were 660 evaluations claimed for the four fiscal years. The audit report disallowed 49 and approved 611. Five reasons were stated in the audit report for excluding evaluations from the calculation of reimbursable costs.

1. Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated instructional employees.

The parameters and guidelines state that the mandate is to evaluate the performance of "certificated instructional employees." All certificated personnel are "instructional" personnel even if they are not classroom teachers. The audit report does not indicate how these other certificated personnel are not implementing the "curricular objectives." The District does concur that the portion of the mandate relating to the evaluation of compliance with the testing assessment standards (the STAR component) is limited to classroom teachers because the parameters and guidelines specifically state "employees that teach" specified curriculum.

2. Preschool teachers do not perform the requirements of the program that is mandated by state of federal law.

Federal law requires preschool instruction for special education pupils as part of the pupil's Individual Education Program. If the teacher is providing instruction to special education preschool pupils, the teacher is implementing the federal mandate.

3. Duplicate teacher evaluations claimed multiple times in one school year.

Potential "duplicate" evaluations generally occur as a result of an employee transferring to another school during the evaluation cycle, or a change in employment status of the employee. The District concurs that only one complete evaluation should be counted for each employee.

4. Permanent biannual teacher evaluations claimed every year rather than every other year.

The District concurs that only one complete evaluation should be counted for each employee every other year after the employee attains permanent status.

5. Permanent five-year teacher evaluations claimed multiple times in a five-year period rather than once every five years.

The District concurs that only one complete evaluation should be counted for each employee every fifth year after the employee attains permanent five-year status.

SCO's Comment

Issue 1—Time Study Activities

Preparation activities:

Our finding and recommendation are unchanged. The activities related to planning, preparation, and organizing notes are not listed as reimbursable activities in the program's parameters and guidelines.

The district states in its response that "preparation is a reasonable and necessary part of implementing the evaluation mandate." While the district may believe that these activities are "reasonable and necessary"

activities, the reimbursement is limited to only those activities outlined in the parameters and guidelines (sections IV.A.1, IV.A.2, and IV.B.1). The district may file an amendment with the Commission on State Mandates (CSM) to amend the existing parameters and guidelines.

Training:

Our finding and recommendation are unchanged. The district stated that due to the parameters and guidelines limitation, the direct cost method used by the SCO in determining allowable costs is a reasonable method.

Evaluation Conferences:

Our finding and recommendation are unchanged. The conferences between the teachers and evaluators are non-reimbursable activities.

The district states in its response that "the mandate reimburses the new program requirement to 'evaluate and assess' which necessarily involves a comprehensive process." We disagree. Not all activities from the evaluation process are reimbursable. The mandate reimburses only those activities that impose a new requirement or higher level of service for the agencies.

The parameters and guidelines (sections IV.A.1, IV.A.2, and IV.B.1) specify that reimbursement is limited to only those activities outlined in each section. Section IV.B.1 identifies reimbursable evaluation conferences only for those instances when an unsatisfactory evaluation took place for certificated instructional or non-instructional personnel in those years in which the employee would not have otherwise been evaluated.

However, the district neither claimed reimbursement for, nor provided documentation supporting that unsatisfactory evaluations were completed during the audit period. Thus, the question remains whether the evaluation conferences are reimbursable for evaluations claimed under sections IV.A.1 and IV.A.2 of the parameters and guidelines. Sections IV.A.1 and IV.A.2 do not identify evaluation conferences or any other types of conferences as reimbursable activities.

Furthermore, the CSM found in its statement of decision that evaluation conferences between the evaluators and teachers are not reimbursable because they were required before the enactment of the test claim legislation.

Under prior law, the evaluation had to be reduced to writing and a copy of the evaluation had to be given to the employee. An evaluation meeting had to be held between the certificated employee and the evaluator to discuss the evaluation and assessment. The CSM indicated in its statement of decision document that:

... the 1975 test claim legislation did not amend the requirements in Former Education Code sections 13488 and 13489 to prepare written evaluations of certificated employees, receive responses to those evaluations, and conduct a meeting with the certificated employee to discuss the evaluation....

Furthermore, the 1983 test claim statute still requires school districts to reduce the evaluation to writing, to transmit a copy to the employee, and to conduct a meeting with the employee to discuss the evaluation and assessment. These activities are not new.

However, the 1983 test claim statute amended the evaluation requirements by adding two new evaluation factors relating to 1) the instructional techniques and strategies used by the employee, and 2) the employee's adherence to curricular objectives. The CSM found that Education Code section 44662, subdivision (b), as amended by Statutes of 1983, Chapter 498, imposed a new required act on school districts to do the following:

... evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives.

Reimbursement is limited to the additional requirements imposed by the amendments. The additional requirements include the review of the employee's instructional techniques and strategies and adherence to curricular objectives, and to include in the written evaluation of the certificated instructional employees the assessment of only these factors. Conference activities are not imposing a new program or higher level of service.

Issue 2—Disallowed Evaluations

1. Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated instructional employees.

Our finding and recommendation are unchanged. The district states that "All certificated personnel are 'instructional' personnel even if they are not classroom teachers." We disagree.

The language of the program's parameters and guidelines and the CSM statement of decision address the difference between certificated instructional employees and certificated non-instructional employees.

In its statement of decision, the CSM identifies instructional employees as teachers and non-instructional employees as principals and various administrators. The CSM further states that the test claim legislation, as it relates to evaluation and assessment of certificated non-instructional employees, does not constitute a new program or higher level of service.

In addition, the parameters and guidelines clearly identify reimbursable components and activities as they relate to certificated instructional and certificated non-instructional personnel. Our draft report identifies a finding related to the component of evaluating instructional techniques and strategies and adherence to curricular objectives for the certificated instructional employees. The intent of this component is to evaluate the elements of classroom instruction. Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists do not provide classroom instruction and are considered "non-instructional" certificated personnel.

2. Preschool teachers do not perform the requirements of the program that is mandated by state or federal law.

Our finding and recommendation are unchanged. The district states the following in its response:

Federal law requires preschool instruction for special education pupils as part of the pupil's Individual Education Program. If the teacher is providing instruction to special education preschool pupils, the teacher is implementing the federal mandate.

Our finding indicated that the evaluations of the preschool teachers were excluded for reimbursement. The finding did not indicate that we excluded those teachers who work with special education pupils. The issue at hand is whether preschool teachers, in general, perform the requirements of the educational program mandated by state or federal law. We believe they do not.

The district has not provided any legal citation or other source to support its assertions. In addition, the district has not provided any documentation to support that preschool teachers previously excluded from reimbursement, if any, performed any activities related to special education pupils.

3. Duplicate teacher evaluations claimed multiple times in one school year.

The district concurs with our finding and recommendation.

4. Permanent biannual teacher evaluations claimed every year rather that every other year.

The district concurs with our finding and recommendation.

5. Permanent five-year teacher evaluations claimed multiple times in a five-year period rather than once every five years.

The district concurs with our finding and recommendation.

Additional documentation provided by the district

Subsequent to the issuance of the draft audit report, the district provided our office with additional documentation relating to the number of teacher evaluations we determined were allowable and unallowable.

The additional documentation included information for six individual teachers with the following clarifying information:

- Change of employment status,
- Corrected evaluation dates, and
- Corrected input errors.

After reviewing the additional documentation, we incorporated the information provided into our analysis of allowable teacher evaluations. Based on the teacher employment status and evaluation dates corrected by the district, we revised the allowable teacher evaluations as follows:

		Fiscal	Year		
	2005-06	2006-07	2007-08	2008-09	Total
Previous count of teachers	162	105	201	143	
Additional documentation	160	106_	201	147	
Difference	(2)	1		4	3

As a result, we concluded that three additional evaluations are allowable for the audit period. Subsequently, we reinstated \$1,220 in salary and benefits costs and \$80 in related indirect costs we previously identified as unallowable. We incorporated the additional evaluation activity costs into our Summary of Program Costs (Schedule 1).

OTHER ISSUES

The district's response included other comments related to the mandated cost claims. The district's comments and SCO's responses are presented below.

Management representation letter

District's Response

The district will not be providing the requested management representation letter since it could be construed as a waiver of future appeal rights.

SCO's Comment

Our finding and recommendation are unchanged. We modified our audit report to disclose that the district declined to provide the written representation letter that is recommended by generally accepted government auditing standards.

Public records request

District's Response

The District requests copies of all audit work papers in support of the audit findings. The District requests that the Controller provide the District any and all written instructions, memoranda, or other writings in effect and applicable during the claiming periods to the findings.

SCO's Comment

The SCO will respond to the district's request by a separate letter by June 29, 2012.

Attachment— District's Response to Draft Audit Report

a world class district

CERTIFIED MAIL - RETURN RECEIPT REQUESTED

May 9, 2012

Mr. Jim L. Spano, Chief Mandated Costs Audits Bureau Division of Audits State Controller's Office P.O. Box 942850 Sacramento, CA 94250-5874

Re: Carlsbad Unified School District

Stull Act Audit

FY 2005-06 through FY 2008-09

Dear Mr. Spano:

This letter is the response of the Carlsbad Unified School District to the draft audit report dated May 2, 2012, received by e-mail on May 3, 2012, for the above-referenced program and fiscal years, transmitted by the letter from Jeffrey V. Brownfield, Chief, Division of Audits, State Controller's Office.

The District appreciated the opportunity to conduct a time study of program costs to replace the original documentation. The time study is a reasonable method to fulfill the Controller's expectations for cost accounting and documentation. However, the District will later file an incorrect reduction claim due to the limited scope of activities approved for reimbursement. The District disagrees with the Controller's interpretation of the Stull Act legislation and the test claim findings. From the discussion at the exit conference on April 23, 2012, it is clear that this disagreement cannot be resolved at this point. A Commission on State Mandates decision will be needed since this is an issue of statewide significance relevant to all Stull Act audits.

Issue 1 Time study activities

The audit report concludes that of the \$512,761 in salaries and benefits and related indirect costs claimed for the audit period, that \$237,360 is allowable and \$275,401 is "unallowable primarily because the district claimed reimbursement for non-mandated activities" rather than due to insufficient documentation.

In response to the Controller's exclusion at the beginning of the audit of all of the original claim documentation, the District prepared a time-study based on the FY 2010-11 certificated staff evaluation cycle. The time study identified 22 discrete activities based on staff interviews. Actual time spent on these activities was collected from the employees involved. An average time spent for each of these activities was calculated. These average times per activity were assigned to a relevant job title or group of titles for purposes of determining the appropriate productive hourly rate to be applied to each activity. However, the audit report allows only 3 of the 22 time study activities.

3 Activities Allowed

1. Conducting "informal" classroom observations

2. Conducting "formal" classroom observations

 Writing Final Evaluation Reports and/or preparing Teacher Evaluation Report

19 Disallowed Activities

The remaining 19 activities were not approved for reimbursement. These can be grouped into three categories:

Preparation activities: The audit report disallows activities related to planning, preparation, and organizing of notes for the evaluations, because these activities are "not reimbursable under the mandate." The audit report does not provide a legal citation or other source for this conclusion. Preparation is a reasonable and necessary part of implementing the evaluation mandate.

Training: The audit report concludes that training time is not a proper subject for a time study of repetitive activities. Instead, the audit report allows most of the training costs as direct costs, based on the District's original claim documentation. The adjustment amount is \$889 based on the direct cost method. The training time included in the time study was intended to pertain to the annual repetitive process to train evaluators for the annual evaluation cycle. However, due to the parameters and guidelines limitation that training costs not be duplicated for any one employee, the direct cost method is a reasonable method of preventing duplication of these costs.

Evaluation Conferences: The audit report concludes that conferences between the evaluators and teachers are unallowable "because they were required before the enactment of the test claim legislation." The audit report does not provide a legal citation or other source for this threshold conclusion that conferences were previously required by law. The mandate reimburses the new program requirement to "evaluate and assess" which necessarily involves a comprehensive process. The classroom observations are one part of a continuum of evaluation and assessment steps, none of which individually completes the mandate. The conferences and related tasks are effective and

efficient methods to evaluate and assess employees and necessary to communicate the findings of the evaluation to the employee. Whether the conferences in general were required as a matter of law before the Stull Act is a decision for the Commission pursuant to a future incorrect reduction claim. Even if conferences were part of previous evaluation procedures, either by law or practice, the subject matter of these conferences is now different as a result of the Stull Act.

Issue 2 Disallowed evaluations

There were 660 evaluations claimed for the four fiscal years. The audit report disallowed 49 and approved 611. Five reasons were stated in the audit report for excluding evaluations from the calculation of reimbursable costs.

 Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated instructional employees.

The parameters and guidelines state that the mandate is to evaluate the performance of "certificated instructional employees." All certificated personnel are "instructional" personnel even if they are not classroom teachers. The audit report does not indicate how these other certificated personnel are not implementing the "curricular objectives." The District does concur that the portion of the mandate relating to the evaluation of compliance with the testing assessment standards (the STAR component) is limited to classroom teachers because the parameters and guidelines specifically state "employees that teach" specified curriculum.

Preschool teachers do not perform the requirements of the program that is mandated by state or federal law.

Federal law requires preschool instruction for special education pupils as part of the pupil's Individual Education Program. If the teacher is providing instruction to special education preschool pupils, the teacher is implementing the federal mandate.

3. Duplicate teacher evaluations claimed multiple times in one school year.

Potential "duplicate" evaluations generally occur as a result of an employee transferring to another school during the evaluation cycle, or a change in employment status of the employee. The District concurs that only one complete evaluation should be counted for each employee.

 Permanent biannual teacher evaluations claimed every year rather than every other year. The District concurs that only one complete evaluation should be counted for each employee every other year after the employee attains permanent status.

 Permanent five-year teacher evaluations claimed multiple times in a fiveyear period rather than once every five years.

The District concurs that only one complete evaluation should be counted for each employee every fifth year after the employee attains permanent five-year status.

Auditor's "Certificated Evaluation Log" Errata

After the April 23, 2012, exit conference, the District reviewed the auditor's schedule of disallowed evaluations and provided the following information to the auditor by e-mail dated April 27, 2012.

Fiscal Year Employee

2005-2006

Ellen Weatherall

- The last reported evaluation date was listed as 10/24/04. That is incorrect; the date should have been recorded as 04/23/04.
- Evaluated on 05/09/09 and applied for a five-year evaluation on 05/23/09.
- Next evaluation due in 2013-14.

2006-2007

Janet Peabody

- Evaluated 06/14/06 by C. VanVooren at Jefferson Elementary School.
- Evaluated 05/16/07 by M. Watson at Aviara Oaks Middle School.
- Evaluated 05/12/09 by C. Milllikin at Aviara Oaks Middle School.

Esmeralda Sandoval

- In 2005-06 applied for, but did not complete, Tier 2 and was not evaluated in May 2006; inaccurately logged.
- Evaluated 06/11/07 and 05/12/09.

2007-2008

All employees that were noted "No evaluation completed. Date of last evaluation was" were on a five-year evaluation plan, and the due dates were listed.

2008-2009

Jan Burda

04/23/04

Evaluation

05/24/06

Signed 5-Year Evaluation Agreement

05/06/09 10/19/09	Evaluation 5 Year Signed 5-Year Evaluation Agreement
	Christine Kunkel
02/21/08 06/13/08 05/11/09	Changed status from Temporary to Probationary Evaluation – Probationary Evaluation – Permanent (1st year)
	Joseph Purser
02/13/07 05/02/08 05/12/09 04/29/11	Evaluation – Temporary Evaluation – Probationary Evaluation – Permanent Evaluation – Permanent

Management Representation Letter

The District will not be providing the requested management representation letter since it could be construed as a waiver of future appeal rights.

Public Records Request

The District requests copies of all audit work papers in support of the audit findings. The District requests that the Controller provide the District any and all written instructions, memoranda, or other writings in effect and applicable during the claiming periods to the findings.

Government Code Section 6253, subdivision (c), requires the state agency that is the subject of the request, within ten days from receipt of a request for a copy of records, to determine whether the request, in whole or in part, seeks copies of disclosable public records in possession of the agency and promptly notify the requesting party of that determination and the reasons therefore. Also, as required, when so notifying the District, the agency must state the estimated date and time when the records will be made available.

Sincerely,

Devin Vodicka, Assistant Superintendent Business Services

Carlsbad Unified School District

Alloh

Keith Petersen, President, SixTen and Associates

State Controller's Office
Division of Audits
Post Office Box 942850
Sacramento, CA 94250-5874

http://www.sco.ca.gov

Fiscal Year

2008-2009

Six ien and Associaces **Mandate Reimbursement Services**

KEITH B. PETERSEN, President

OLAIM PILE COPY

3270 Arena Blvd., Suite 400-363 Sacramento, CA 95834 Telephone: (916) 419-7093

Fax: (916) 263-9701 E-Mail: kbpsixten@aol.com

5252 Balboa Avenue, Suite 900 San Diego, CA 92117 Telephone: (858) 514-8605 Fax: (858) 514-8645 www.sixtenandassociates.com

January 29, 2010

CERTIFIED MAIL #7001 0360 0000 5999 8768

Ms. Virginia Brummels, Section Manager Local Reimbursement Section Division of Accounting and Reporting Office of the State Controller P.O. Box 942850 Sacramento, CA 94250

RE: Annual Reimbursement Claims

Carlsbad Unified School District S37030

Dear Ms. Brummels:

Enclosed please find the original claims and extra copies of the FAM-27 for Carlsbad Unified School District's reimbursement claims listed below:

1253/75	Pupil Suspensions, Expulsions, and Expulsion Appeals	2008-09
498/83	Notification of Truancy	2008-09
498/83	The Stull Act	2008-09
98/94	Caregiyer Affidavits	2008-09
975/95	Physical Performance Tests	2008-09

If you have any questions regarding these claims, please contact me at (858) 514-8605.

Sincerely,

pt Branwell Larry Hendee, Vice-President

	CLAIM FOR PAYMEN	ır	For State Controller Use Only	Drogram
Pur	suant to Government Code S		(19) Program Number 00260	Program
,	THE STULL ACT	,	(20) Date Filed//_ (21) LRS Input//	260
Claimant Identification	Number		(21) LNO III)ut/	
	S37030	·	Reimbursement Cl	aim Data
(02) Claimant Name	Carlsbad Unified School Distr	ict	(22) FORM-1, (03)(A)(f)	28,491
Address	San Diego County		(23) FORM-1, (03)(B)(f)	13,696
·	6225 El Camino Real		(24) FORM-1, (03)(C)(f)	36,876
	Carlsbad CA	92009	(25) FORM-1, (03)(D)(f)	17,431
Type of Claim	Estimated Claim	Reimbursement Claim	(26) FORM-1, (03)(E)(f)	146
	(03) Estimated	(09) Reimbursement	(27) FORM-1, (03)(F)(f)	88
	(04) Combined	(10) Combined	(28) FORM-1, (03)(G)(f)	59
	(05) Amended	(11) Amended	(29) FORM-1, (03)(H)(f)	73
Fiscal Year of cost	(06)	(12) 2008-2009	(30) FORM-1, (03)(I)(f)	
Total Claimed Amount	(07)	(13) \$ 102,846	(31) FORM-1, (05)	6
Less: 10% Late Penalty	(refer to claiming	(14)	(32) FORM-1, (06)	5,986
instructions) Less : Prior Claim Paym	ent Received	(15)	(33) FORM-1, (08)	
Net Claimed Amount		(16)	(34) FORM-1, (09)	
Due from State	(08)	\$ 102,846 (17)	(35)	
Due to State		\$ 102,846 (18)	(36)	·
(37) CERTIFICATION OF	CLAIM	<u></u>		
mandated cost claims w provisions of Governme I further certify that there claimed herein, and suc	ith the State of California for th nt Code Sections 1090 to 1098 was no application other than h costs are for a new program h in the Parameters and Guide	e Section 17561, I certify that I am t is program, and certify under penal i, inclusive. from the claimant, nor any grant or or increased level of services of an lines are identified, and all costs cla	ty of perjury that I have not violated payment received, for reimbursen existing program. All offsetting sa	d any of the
The amounts for this Es costs set forth on the att and correct.	timated Claim and/or Reimburs ached statements. I certify und	ement Claim are hereby claimed fr der penalty of perjury under the law	om the State for payment of estimates of the State of California that the	ated and/or actual foregoing is true
Signature of Authorized	Officer (USE BLUE INK)		Date	
WHY			1-25-10	
Walter Freeman			Assistant Superintendent, Busine	ess Services
Type or Print Name			Title	
3) Name of Contact Per	son for Claim	Talanhana Niemter	(DEO) E44 DOOE	İ
SixTen and Assoc	iates	Telephone Number: E-mail Address:		
CIVICII ALIA W2200	เฉเธอ	L-mail Address:	kbpsixten@aol.com	

imant: ad Unified School District Costs imbursable Activities eviewing Employee's Techniques and Strategies eviewing STR Results valuation to Include Assessment of echniques and Strategies ssessing Based on STR Results	(a) Salaries and Benefits \$ 28,490 \$ 13,699	(b) Materials and Supplies	(02) Cont) ract	Accounts (d) Fixe		(e Tra	vel		(f)
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ssessing Based on STR Results	\$ 36,876	5.34 \$	- \$	-	\$	-	\$	-	\$	36,876.34
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ttaching Response to Personnel File	\$ 8	7.89 \$	- \$	-	\$		\$	-	\$	87.89
educing Evaluation to Writing	\$ 58	3.59 \$	- \$	-	\$	-	\$	-	\$	58.59
iscussing Evaluation with CIE	\$ 73	3.24 \$	- \$	_	\$		\$	-	\$	73.24
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al Direct Costs	\$ 96,866	0.26 \$	- \$	-	\$	-	\$	-	\$	96,860.26
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s: Offsetting Savings									\$	-
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A. CIE Review employee's techniques and strategies		Evaluation to inc of techniques ar	elude assessment ad strategies				
Review STR Results		Assessment bas	ed on STR result	s			
B. CIE & NIE Evaluating and assessing CIE according to certain criteria		Reducing evalua	ation to writing		Transmitting eva	aluation to CIE	
Attaching response to personnel file		Discussing evalu	uation with CIE				
(04) Description of Expenses	TT				bject Accoun		
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed, and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
			·				
Attendance at training required to perform evaluations Bloomquist, Tom Assistant Principal	\$75:31	1.5	\$ 112.97				
Giordani, Marjorie Assistant Principal	\$67.98	1.5	\$ 101.97				
Kalk, Dave Assistant Principal Lord, Bill Assistant Principal	\$64.41 \$71.73	1.0 1.5					
Morales, J. Cesar Assistant Principal	\$71.73	2.0					
Discussing the CIT's apple and chications							
Discussing the CIE's goals and objectives Administrators Various	\$73.24	136.5	\$ 9,997.26				
bservation conference and discussion with CIE Administrators Various	\$73.24	110.2	\$ 8,071.0 5				
Preparing to evaluate and assess the performance of a CIE Administrators Various	\$73.24	134.0	\$ 9,814.16				
Training staff that will be performing the evaluations Millikin, Carolyn Principal	\$79.28	1.0	\$ 79.28				-
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strategies		of techniques a	nd strategies				
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Evaluating and assessing CIE		·					
B. CIE & NIE according to certain criteria		Reducing evalu	ation to writing		Transmitting e	valuation to CIE	
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Administrators Various	\$73.24	66.3	\$ 4,855,81				
Pre-observation conference and discussion with CIE						}	
Administrators Various	\$73.24	54.2	\$ 3,969.61				
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A. CIE Review employee's techniques and strategies		Evaluation to inc of techniques an	lude assessment d strategies				
Review STR Results	<i>A</i>	Assessment bas	ed on STR results				
B. CIE & NIE Evaluating and assessing CIE according to certain criteria		Reducing evalua	tion to writing		Transmitting eva	aluation to CIE	
Attaching response to personnel file		Discussing evalu	ation with CIE				
(04) Description of Expenses					bject Accoun		
(a)	(b) Hourly	(c) Hours	- (d)	(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed, and Description of Expenses	Rate or Unit Cost	Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
Classroom observation to evaluate and assess performance Administrators Various	\$73.24	175.3	\$ 12,838.97				
Discussing evaluation and write-up with CIE Administrators Various	\$73.24	147.0	\$ 10,766.28				
Post-observation conference and discussion with CIE Administrators Various	\$73.24	118.3	\$ 8,664.29				
aducing evaluation to writing, forward to personnel file Administrators Various	\$73.24	62.9	\$ 4,606.80				
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		1 of 1	6 000000			P	0
(05) Total 🗶 Subtotal 🗀 New 12/05	Page	1 01 1	\$ 36,876.34	\$ -	\$ -	\$ -	-

State Controller's Office	MANDATI	DCOSTS			Sch	ool Mandate	d Cost Manua
Ptogram 260	THE ST	ULL ACT					FORM
COMP (01) Claimant	ONENT/ACT	VITY COST D					2
adspad Unified School District		(02) Fiscal	Year				
							2008-2009
Sing and box per form to	identify the co						
A. CIE Review employee's techniques and strategies		Evaluation to in of techniques a	clude assessment nd strategies				
Review STR Results	X	Assessment ba	sed on STR résult	s 			
B. CIE & NIE Evaluating and assessing CIE according to certain criteria		Reducing evalu	ation to writing		Transmitting ev	aluation to CIE	
Attaching response to personnel file		Discussing eval	uation with CIE				
(04) Description of Expenses				C	bject Accoun	ıts	
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed, and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
				·			
Classroom observation to evaluate and assess performance Administrators Various	\$73.24	93.2	\$ 6,825.97				
Discussing evaluation and write-up with CIE	,,,,,,,	00.2	Ψ 0,020.31				
Administrators Various	\$73.24	75.2	\$ 5,507.65				
Post-observation conference and discussion with CIE Administrators Various	\$70.04						
Validus	\$73.24	69.6	\$ 5,097.50				
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Total X Subtotal	Page 1	of 1 \$	17,431.12 \$	- !	\$ - \$	8	

State Controller's Office			· · · · · · · · · · · · · · · · · · ·			Sch	ool Mandated	Cost Manua
Program		MANDATE THE STU	D COSTS			_		FORM
260	COM	PONENT/ACTI		DETAIL				2
ે1) Claimant			(02) Fiscal Y	/ear				
idehad Unified School Di								2008-2009
(03,eimbursable Compo	nents: Check only one box per form to	identify the co.	mponent bein	g claimed.				
A. CIE	Review employee's techniques and strategies		Evaluation to in- of techniques a	clude assessment nd strategies				
	Review STR Results		Assessment ba	sed on STR results	S .			
B. CIE & NIE	Evaluating and assessing CIE according to certain criteria		Reducing evalu	ation to writing		Transmitting ev	valuation to CIE	
	Attaching response to personnel file		Discussing eval	luation with CIE				
(04) Description of Expens					0	bject Accour	its	
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
Classificati	ployee Names, Job ions, Functions Performed, escription of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
Classroom observation to evaluat Administrators	e and assess performance Various	\$73.24	0.7	\$ 51.27				
Pre-observation conference and d Administrators	discussion with CIE or NIE Various	\$73.24	0.6	\$ 43.94				-
Preparing to evaluate and assess	the performance of a CIE of NIE						}	
Administrators	Various	\$73.24	0.7	\$ 51,27				
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<u> </u>								
05) Total X	Subtotal	Page	1 of 1	\$ 146.48	\$ -	\$ -	\$ -	\$ -

State Controller's Office	MANDATI	ED COSTS			Scl	nool Mandated	Cost Manua
260	THE ST	ULL ACT	•				FORM
CON	PONENT/ACT	VITY COST	DETAIL				2
'71) Claimant		(02) Fiscal	Year				
arichad Unified School District							2008-2009
(05, deimbursable Components: Check only one box per form to	o identify the co	mponent beir	ng claimed.				<u> </u>
A. CIE Review employee's techniques and strategies		Evaluation to in of techniques	nclude assessmen and strategies	t			
Review STR Results		Assessment ba	ased on STR resul	its			
B. CIE & NIE Evaluating and assessing CIE according to certain criteria		Reducing evalu	uation to writing		Transmitting e	valuation to CIE	
X Attaching response to personnel file		Discussing eva	luation with CIE		- -		
(04) Description of Expenses			T		Object Accou	nts	
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed, and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
Forward the evaluation to the personnel file of the CIE or NIE Administrators Various	\$73.24	1.2	2 \$ 87.89				
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5) Total 🔀 Subtotal 🗀	Page 1	of 1	\$ 87.89	\$ -	\$ -	\$ - 3	

Arogram 26 0	Ci		ED COSTS ULL ACT IVITY COST D	ETAIL		Ocin	ooi manuateu	FORM 2
1) Claimant المراطنة	chool District		(02) Fiscal Y	′еаг		. =		2008-20
03) Reimbursable	Components: Check only one box per form	n to identify the co	mponent being	g claimed.				
A. CIE	Review employee's techniques an strategies	d	Evaluation to inc of techniques ar	clude assessment nd strategies				
	Review STR Results		Assessment bas	sed on STR result	s			
B. CIE & NIE	Evaluating and assessing CIE according to certain criteria	X	Reducing evalua	ation to writing		Transmitting ev	aluation to CIE	
	Attaching response to personnel fi	le 🔲	Discussing evalu	uation with CIE		\$.		
04) Description of					0	bject Accoun	ts	
	(a)	(b)	(c)	(d)	(e)	(f).	(g)	(h)
	Employee Names, Job lassifications, Functions Performed, and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
educing evaluation of Administra	SIE OF NIE to writing ttors Various	\$73.24	0.8	\$ 58.59	·			
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State Controller's Office	· · · · · · · · · · · · · · · · · · ·			- ··		Sch	ool Mandated	Cost Manua
Program 260	COME	MANDATE THE STU	JLL ACT	TAI				FORM 2
`1) Claimant	CONF	PONENT/ACTI			 			<u> </u>
art ad Unified School Di	strict		(02) Fiscal \	rear				2008-2009
(03) reimbursable Compo	nents: Check only one box per form to	identify the cor	mponent bein	g claimed.	·			
A. CIE	Review employee's techniques and strategies		Evaluation to in of techniques a	clude assessment nd strategies				
	Review STR Results		Assessment ba	sed on STR result	S			:
B. CIE & NIE	Evaluating and assessing CIE according to certain criteria		Reducing evalu	ation to writing		Transmitting ev	aluation to CIE	
	Attaching response to personnel file	х	Discussing eval	uation with CIE		<u> </u>		
(04) Description of Expens					0	bject Accoun	ts	
	(a)	(b)	(c)	(d)	(e)	(f).	(g)	(h)
Classificat	ployee Names, Job lons, Functions Performed, escription of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
Post-observation conference and	discussion with CIE or NIE]		
Administrators	Various	\$73.24	1.0	\$ 73.24				
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(05) Total 🗓	Subtotal	Page '	1 of 1	\$ 73.24	\$ -	\$ -	\$ -	\$ -
New 12/05					l			

	Component	Review STAR results	Review employee's techniques and strategies	Review STAR results	Review employee's fechniques and strategies	Review STAR results	Review employee's fechniques and strategies	Assessment based on STAR results	Evaluation to include assessment of fechniques and strategies	Assessment based on STAR results	Evaluation to include assessment of fechniques and strategies	Assessment based on STAR results	Evaluation to include assessment of techniques and strategies	Evaluation to include assessment of fechniques and strategies	Evaluating and assessing CIE according to certain criteria	Evaluating and assessing CIE according to certain criteria	Evaluating and assessing CIE according to certain criteria	Reducing evaluation to writing	Discussing evaluation with CIE	Attaching response to personnel file		Review employee's fechniques and strategies	correct company of a recommendate and additional	Review employee's fechniques and strategies		Review employee's techniques and strategies		Review employee's fechniques and strategies		Review employee's techniques and strategies		Review employee's techniques and strategies		
	Salary Activity	\$4,870.46 Preparing to evaluate and assess the performance of a CIE	ш		\$9,997.26 Discussing the CIE's goals and objectives	\$3,969.61 Pre-observation conference and discussion with CIE	\$8,071.05 Pre-observation conference and discussion with CIE	\$6,825.97 Classroom observation to evaluate and assess performance	වු						Бo				with CIE or NIE			Attendance at training required to perform evaluations		\$101.97 Attendance at training required to perform evaluations		\$64.41 Attendance at training required to perform evaluations		\$107.60 Attendance at training required to perform evaluations		\$79.28 Training staff that will be performing the evaluations		Attendance at training required to perform evaluations		430,000.20
	꿆			\$73.24				\$73.24						\$73.24		\$73.24	\$73.24	\$73.24	\$73.24	\$73.24		\$75.31		\$67.98		\$64.41		\$71.73		\$79.28		\$71.01		
	Title	Various	Various	Various	Various	Various	Various	Various	Various	Various	Various	Various	Various	Various	Various	/arious	Various	Various	Various	Various	a	Assistant Principal	otai		otal	Assistant Principal		Assistant Principal		cipal	ē		otal	-
	9		-		Administrators \	Administrators \	Administrators \	Administrators \	Administrators \	Administrators \				Administrators \	Administrators \		Administrators V	Administrators V		Administrators V	Administrators Total	Bloomquist, Tom A	Bloomquist, Tom Total	Giordani, Marjorie Assistant Principal	<i>l</i> arjorie		ve Total			Millikin, Carolyn P	Millikin, Carolyn Total	Morales, J. Cesar Assistant Principal	Morales, J. Cesar Total Grand Total	
-	Hours	66.50	134.00	66.30	136.50	54.20	110.20	93.20	175.30	09.69	118.30	75.20	147.00	62.90	0.70	0.60	0.70	0.80		-	چ	1.50	_	_		_	_	_		0.1	1.00		2.00 1,322.70	
-	Date	60-80	80-80 08-80	60-80	60-80	60-80	60-80	60-80	60-80	60-80	08-09	60-80	60-80	60-80	60-80	60-80	60-80	60-80	60-80	60-80		60-80		60-80	1	60-80		60-80	;	60-80		60-80	•	

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Combined Schedule 1 Carlsbad Unified School District Stull Act 498/83 Termporary, Probationary, and Permanent Evaluations Fiscal Year: 2008-2009 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Administrators" on Permanent, Probationary, &

Temporary evaluations.

Source: Combined Schedule 2.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
Hours Worked (Code 11)	66.5	134.0
Hours Worked (Code 12)	66.3	136.5
Hours Worked (Code 13)	54.2	110.2
Hours Worked (Code 14)	93.2	175.3
Hours Worked (Code 15)	69.6	118.3
Hours Worked (Code 16)	75.2	147.0
Hours Worked (Code 17)		62.9

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

*Evaluation Criteria

- District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives

Conclusion: Findings will go forward to the Stull Act FORM-2.

Combined Schedule 2 Carlsbad Unified School District Stull Act 498/83

Termporary, Probationary, and Permanent Evaluations

Fiscal Year: 2008-2009 Time Summary

Purpose: To summarize Total Hours Worked by Various Administrators evaluating teachers.

Source: Schedule 1A, 1B and 1C.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
Code 11		
Temporary	13.7	26.4
Probationary	1.3	2.6
Permanent	51.5	105.0
	66.5	134.0
Code 12	. •	
Temporary	10.3	23.2
Probationary Permanent	1.4	3.1
1 Simulett	54.6	110.3
Code 13	66.3	136.5
Temporary	9.1	19.0
Probationary	1.0	1.9
Permanent	44.1	89.3
	54.2	110.2
Code 14		•
Temporary	12.7	29.6
Probationary Permanent	1.8	4.0
Permanent	78.8	141.8
Code 15	93.2	175.3
Temporary	10.1	21.1
Probationary	1.7	2.6
Permanent	57.8	94.5
	69.6	118.3
Code 16		
Temporary	10.6	23.2
Probationary	1.7	3.1
Permanent	63.0	120.8
Code 17	75.2	147.0
Temporary		. 00
Probationary		9.3 1.1
Permanent		52.5
		62.9
		02.9

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

ပင်္ဂnclusion: Findings go to Combined Schedule 1.

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives
- (D) Suitable learning environment

Print Date: 1/5/2010 CBAD SA 08-09 Array

Schedule 1A Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2008-2009 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Administrators".

Source: Schedule 1AA Temporary and SA 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B&C
# of reimbursable K-12 evaluations	38	38
Avg. time p/ evaluation preparation	21.7	41.7
Total Time (in minutes)	823	1583
Per Hour	60	60
Hours Worked (Code 11)	13.7	26.4
# of reimbursable K-12 evaluations	38	38
Avg. time p/ goals & obj. conf. with instructor	16.3	36.7
Total Time (in minutes)	621	1393
Per Hour	60	60
Hours Worked (Code 12)	10.3	23.2
# of reimbursable K-12 evaluations	38	38
Avg. time p/ pre-observation conf. with instructor	14.3	30.0
Total Time (in minutes)	545	1140
Per Hour	60	60
Hours Worked (Code 13)	9.1	19.0
# of reimbursable K-12 evaluations	38	38
Avg. time p/ classroom observation of instructor	20.0	46.7
Total Time (in minutes)	760	1773
Per Hour	60	60
Hours Worked (Code 14)	12.7	29.6
# of reimbursable K-12 evaluations	38	38
Avg. time p/ post-observation conf. with instructor	16.0	33.3
Total Time (in minutes)	608	1267
Per Hour	60	60
Hours Worked (Code 15)	10.1	21.1
# of reimbursable K-12 evaluations	38	38
Avg. time p/ final conf. with instructor	16.7	36.7
Total Time (in minutes)	633	1393
Per Hour	60	60
Hours Worked (Code 16)	10.6	23.2
# of reimbursable K-12 evaluations		38
Avg. time p/ district reporting		14.7
Total Time (in minutes)		557
Per Hour		60
Hours Worked (Code 17)		9.3

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

ode 17- District reporting

Conclusion: Findings will go forward to Combined Schedule 2.

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives

498/83 The Stull Act (K-12) Routine Evaluations of Instructors DISTRICT STATISTICS REPORT

\mathcal{A}	DISTRICT STATISTICS REP
District/COE Car 15hul	United Sch. Dist.
BISTRICTOCOL. C . S.S.C.C	- John List.

The following cost accounting statistics will assist the calculation of the districts reimbursement. Please report the required information in the spaces provided.

Certificated Instructors Statistical Data		Fiscal	Year
	06-07	07-08	08-09
1 A K-12 Probationary Teachers- Total Number		 	
1 B K-12 Permanent Teachers- Total Number	 		6
1 C K-12 Temporary Teachers- Total Number			484
1 D K-12 Classroom Teachers- A + B+ C = Total Number			29
2 A K-12 Probationary Teachers- Total Number Evaluated			519
2 B K-12 Permanent Teachers- Total Number Evaluated			5
2 C K-12 Temporary Teachers- Total Number Evaluated			189
2 D K-12 Classroom Tanaham A Tanaham A			_38
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated 3* K-12 Categorical/Cropt Teach			232
12 Oategorical/Grant Teachers- Total Number Evaluated			5
Reimbursable K-12 Evaluations- Line 2 D subtract Line 3			227
S.C. 25, 2604 Indian School Assistance Act Any state-federal local arrangements.	62002.5 S	State Catego	orical
r state mandates in order for the district to receive reimbursement. Your signature of ve reported actual data or have provided a good faith estimate which you "certify (or under the laws of the State of California to be true and correct based on your provided." This information is used for cost accounting purposes and the part of the state	sonnel main n this form c r declare) ur ersonal kno	ertifies that ider penalty wledge or	you of
nt Employee Name Mary Kulus	4. 2	8-08	7 3
nployee Signature Date Int Employee Name	itle <u>CXRC</u>	. A55	T. Pers
EASE SUBMIT THIS INFORMATION BY	, at	160-3-	1-50

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Schedule 1AA Carlsbad Unified School District 498/83 Stull Act Temporary Fiscal Year 2008-2009 3 year time study

Prupose: To calculate a 3 year rolling average to be used for the 2008-2009 Stull Act.

Source: Schedule 3.

Findings:

Temporary Evaluations

*Activitiy	2006	-2007	2007	-2008	2008	-2009	Ave	erage
Codes in Minutes	Α	B&C	A	B&C	A	B&C	A	B&C
CODE 11	25.0	50.0	20.0	40.0	20.0	35.0	21.7	41.7
CODE 12	14.0	35.0	15.0	25.0	20.0	50.0	16.3	36.7
CODE 13	8.0	30.0	15.0	20.0	20:0	40.0	14.3	30.0
CODE 14	20.0	55.0	15.0	40.0	25.0	45.0	20.0	46.7
CODE 15	13.0	35.0	15.0	35.0	20.0	30.0	16.0	33.3
CODE 16	15.0	30.0	15.0	35.0	20.0	45.0	16.7	36.7
CODE 17		15.0		9.0		20.0		14.7

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

Conclusion: Findings to go forward to Schedule 1A

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives

Temporary Time Study

Purpose: To calculate time spent by "Various Administrators" on Stull Act. Source: SA 1.7-A Temporary Timesheets. Findings:

							ľ	'Activ	ity Co	Activity Codes in Minutes	Minu	tes					
			_	11			12		H		13		-		-	14	
Schoolsite	Staff	∢	В	ပ	۵	4	В	ပ		V	8	0		4	ď	ر	٥
Aviara Oaks Elementary										+	1	,	-	+	,	,	
Aviara Oaks Middle	David Kalk	ъ	5	5	5	10	10	10	10	10	10	19	10	2	20	20	נכ
	Carolyn Millikin	10	10	10	10	10	10	2	10	10	5	10	10		200	200	, ç
Buena Vista	Tina Howard	ſΩ	5	5	5	20			-	5	+			10	5	i u	2 4
Calavera Hills Elementary	Leslie Harden		9		-	15	15			-	5	5		2 10	5 12	7,	5
Calavera Hills Middle										-		-	+	+	2	2	2
	Tom Bloomquist	15				15		-		15	-	-	1	**240			-
Carlsbad High	Marjorie Giordani	15				15				15		-		ייי ויי			
	Bill Lord	15			!	15				5	-	-		120			
	Margaret Stanchi	30				30	-	-		2 00	+	+	*	**300			
Carlsbad Village Academy	Keith Holley	90	06	06	6	6	S	00	00	+	0	9		200	18	- 6	
Норе	Richard Tubbe	, ,		3	3	3 5	3 5	3 9	+	-	+	+	4	2	3	2	9
offereon	Social District	2			\forall		2	2	10	10	10	10	9	10	5	15	10
Kelly	Jane Harrman	**200	9	9	10	* 300	**200	**200	**100	20 2	20 2	20 2	20	30	30	30	30
Magnetic	l ressie Armstrong	9	9	10	9	20	50	20	20	25 2	25 2	25	25	25	25	25	25
iviagi i Disa	Jimmy Hines				15				30		-		15	-			2
racilic Alm	Robert Devich								_			ŀ	-	-			30
Poinsettia	Steve Ahl	10	2	10	10	10	10	10	10	-	10	-	1		30		3
Valley Middle	Chad Lund					20	20	20	+	20 2	+	20	20	30	3 6	30	30
	J. Cesar Morales					15	15	15	15	+	+	╁	-	12	12	2 2	2 5
Averages		20	19	20	19	23		27	27	21 21	-	╀	-	28	24	23	2 2
Summation of criteria B an	nd C		39		<u>-</u> !	¦ 	25] 	<u>L</u>	ļ	₹	¦	<u> </u> -	<u> </u>	47		
Averages to be used		20	35			20	20			20	40]`` 	25	45		
					l			l	I			II			?		

*Activity Codes

- Code 12- Goals and objectives conference with instructor Code 13- Pre-observation conference with instructor
 - Code 14- Classroom observation of instructor
- Code 15- Post-observation conference with instructor

- Code 11- Preparing for the evaluation
- Code 16- Final conference with instructor
 - Code 17- District reporting

Evaluation Criteria

- (A) District standards and test results
- Instructional techniques/strategies
- Adherence to curricular objectives Suitable learning environment

**Times were not used to calculate averages

1 of 2

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Carlsbad Unifie. school District 498/83 Stull Act

Fiscal Year: 2008-2009 Temporary Time Study

Purpose: To calculate time spent by "Various Administrators" on Stull Act.

Source: SA 1.7-A Temporary Timesheets.

Findings:

						*Acti	vity C	odes	*Activity Codes in Minutes	ufes			
				15			-	16				17	
Schoolsite	Staff	4	В	ပ	۵	4	B	O	Q	٨	ď	ر	٥
Aviara Oaks Elementary											,	,	اد
Aviara Oaks Middle	David Kalk	5	9	9	10	10	20	20	10	rc	ıc	r	u
	Carolyn Millikin		10	10	10		ζ	7	7.	,	o u	טע	ם
Buena Vista	Tina Howard	2	rc	יכי	l.C.	1	2 2	2 14	2 u	S	5	0 5	0 8
Calavera Hills Elementary	Leslie Harden	ß	9	9) rc	2 4	2 5	2 5	יז כ	22	30	77	77
Calavera Hills Middle		-				,	2	2)		3		
	Tom Bloomquist	9				20							
Carlshad High	Marjorie Giordani	30				8							
	Bill Lord	30				30		-					
	Margaret Stanchi	45				30				**100			
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*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 15- Post-observation conference with instructor Code 14- Classroom observation of instructor

Code 16- Final conference with instructor Code 17- District reporting

Evaluation Criteria

(A) District standards and test results

Instructional techniques/strategies

Adherence to curricular objectives

Suitable learning environment

**Times were not used to calculate averages

Conclusion: Findings will go forward to Schedule 1AA. PRINT DATE 1/5/2010 CBAD SA 08-09 Array

2 of 2

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

Routine Evaluations of Instructors

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Revised July 2008

Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

TEMPORARY

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

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498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

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Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12) Routine Evaluations of Instructors

TEMPORARY

Please report below the average amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program. KELLY SCHOOL Department/Location Ressie Armstro 12mo/11mo/10mo/hrly -Fiscal Year: Telephone # 06-07 Work year length(circle) 07-08 Circle the years for which you are responding. Reimbursable Activities Codes: Code 11 Preparing for the evaluation Evaluation Criteria: (A) district standards and test results Code 12 Goals and objectives conference with instructor (B) instructional techniques/strategies Code 13 Pre-observation conference with instructor (C) adherence to curricular objectives Code 14 Classroom observation of instructor (D) suitable learning environment Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District reporting CLASSROOM TEACHER TIME IS NOT REIMBURSED Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps: Average Time in Minutes С D Code 11 Preparing for the evaluation 10 Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District Reporting EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK Employee Signature If you have any questions, please contact PLEASE SUBMIT THIS INFORMATION BY ; TO COPYRIGHT 2004 SixTen and Associates

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Code 14 ()	assroom of	servation o	f inetructor		,	(C) au	ierence	to curric	:ular obi	ective
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7740 12	Guais a	na objectives	s conference w	vith instruc	tor ·					
Code 13										30
Code 13	Pre-obs	ervation conf	ference with in:	structor						
										15
Code 14	Classroo	m observatio	on of instructor	•						-
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498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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Employee	Name	Prin	nci po	al		
		Exact Posit	ion Title			
331-6	200 <u>12mo/11mo/10mo/hrly</u>	/ Figure IV:			_	
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Code 13	Pre-observation conference with instruc					-
Code 14	Classroom observation of instructor					
Code 15		· · · · · · · · · · · · · · · · · · ·				30
Code 15	Post-observation conference with instru	ctor				
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Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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Code 14	Classroom	observatio	on of instructor erence with ins					30.		
Code 14	Classroom Post-obser Final confe	observation conformation confor	on of instructor erence with ins					30.	43	
Code 14 Code 15 Code 16	Classroom Post-obser	observation conformation confor	on of instructor erence with ins					30.	des,	
Code 15 Code 16 Code 17	Classroom Post-obser Final confe	observation conference with i	on of instructor erence with ins	structor			S	30:		50.
Code 15 Code 16 Code 17	Classroom Post-obser Final confei District Rep	vation confirence with i	erence with instructor	Structor			3	30. 15		50.
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Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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Code 11				Α	В	C	D
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Code 12	Goals and objectives conference	ence with instructor				 	-
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Code 13	Pre-observation conference	with instructor		20	20	70	12
Code 14	Classroom observation of ins	fructor				 	ļ
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Employee A ERAGE Time Record for Manuated Costs

498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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Code 10 F	mai contere	nce with instructor.	in instructor	, , -		miy i	etivii oum	ent
Code 17 D	istrict report	ing	CI veer	OOM TEA				•
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each of the	following ev	raiuation steps:	יייין (אייט) 10		A	verage	lime in M	inutes
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Code 12	Goole	and object			<u> </u>			
	Guais a	and objectives confer	ence with instru	tor	100	. ,,		1
Code 13	D-				15	15	15	15
	rre-obs	ervation conference	with instructor		J			
Code 14	CI				12	12	12	12
-Jue 14	Classroo	om observation of ins	tructor				1	
Codo da				·	12	12	1/2	12
Code 15	Post-obs	servation conference	with instructor			 	1-	-
Code 40					12	12	1/2	12
Code 16	Final cor	ference with instruct	or			 	1	
					18	12	12	12
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Schedule 1B Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2008-2009 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Administrators".

Source: Schedule 1BB Probationary and SA 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B&C
# of reimbursable K-12 evaluations	r	
Avg. time p/ evaluation preparation	5	5
Total Time (in minutes)	<u>16.0</u> 80	31.7
Per Hour	_	158
Hours Worked (Code 11)	60 1.3	60
	1.3	2.6
# of reimbursable K-12 evaluations	5	
Avg. time p/ goals & obj. conf. with instructor	16.7	5
Total Time (in minutes)		36.7
Per Hour	83	183
Hours Worked (Code 12)	60	60
12)	1.4	3.1
# of reimbursable K-12 evaluations	5	
Avg. time p/ pre-observation conf. with instructor		5
Total Time (in minutes)	12.0	23.3
Per Hour	60	117
Hours Worked (Code 13)	60	60
(1.0	1.9
# of reimbursable K-12 evaluations	5	_
Avg. time p/ classroom observation of instructor	21.7	5
Total Time (in minutes)	108	48.3
Per Hour		242
Hours Worked (Code 14)	<u> 60</u>	60
,,	1.0	4.0
# of reimbursable K-12 evaluations	5	~ `
Avg. time p/ post-observation conf. with instructor	20.0	5
Total Time (in minutes)	100	31.7
Per Hour	60	158
Hours Worked (Code 15)	1.7	60
` '	1.7	2.6
# of reimbursable K-12 evaluations	5	F
Avg. time p/ final conf. with instructor	20.0	5
Total Time (in minutes)	100	36.7
Per Hour	60	183
Hours Worked (Code 16)	1.7	60
·	1.7	3.1
# of reimbursable K-12 evaluations		E
Avg. time p/ district reporting		5
Total Time (in minutes)		13.3
Per Hour		67
Hours Worked (Code 17)	-	60
•		1.1

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

nde 17- District reporting

Conclusion: Findings will go forward to Combined Schedule 2.

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives

498/83 The Stull Act (K-12) Routine Evaluations of Instructors

District/COE: Car 15had	United Sch. Dist.

The following cost accounting statistics will assist the calculation of the districts reimbursement. Please report the required information in the spaces provided.

Certificated Instructors Statistical Data		Fiscal	Year
	06-07	07-08	08-09
1 A K-12 Probationary Teachers- Total Number			/
1 B K-12 Permanent Teachers- Total Number			484
C K-12 Temporary Teachers- Total Number			
D K-12 Classroom Teachers- A + B+ C = Total Number			29
A K-12 Probationary Teachers- Total Number Evaluated			519
B K-12 Permanent Teachers- Total Number Evaluated			
C K-12 Temporary Teachers- Total Number Evaluated			189
D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated			38
K-12 Categorical/Grant Teachers- Total Number Evaluated			232
Reimbursable K-12 Evaluations- Line 2 D subtract Line 2			5
C. 52012 School Improvement E.C. 52065 Native American E.C. 52852 Coordinated Categorical E.C. 54425(b) Chapter 1 Federal compensate E.C. 54724 Drop-out Prevention E.C. 5.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant- funded	62002.5 S personnel	tate Catego	
ury under the laws of the State of California to be true and correct based on your permation." This information is used for cost accounting purposes only. PLEASE US	declare) un ersonal knov E BLUE INK 9-2	der penalty vledge or	of Rever

RIGHT 2004 SixTen and Associates

Schedule 1BB Carlsbad Unified School District 498/83 Stull Act Probationary Fiscal Year 2008-2009 3 year Time Study

Prupose: To calculate a 3 year rolling average to be used for the 2008-2009 Stuli Act.

Source: Schedule 4.

Findings:

Probationary Evaluations

*Activitiy	2006	-2007	2007	-2008	2008	-2009	Ave	erage
Codes in Minutes	A	B&C	А	B&C	А	B&C	Α	B&C
CODE 11	20.0	40.0	15.0	40.0	13.0	15.0	16.0	31.7
CODE 12	20.0	45.0	15.0	30.0	15.0	35.0	16.7	36.7
CODE 13	7.0	15.0	15.0	30.0	14.0	25.0	12.0	23.3
CODE 14	20.0	60.0	20.0	50.0	25.0	35.0	21.7	48.3
CODE 15	20.0	40.0	20.0	30.0	20.0	25.0	20.0	31.7
CODE 16	25.0	40.0	20.0	40.0	15.0	30.0	20.0	36.7
CODE 17		15.0		10.0		15.0		13.3

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

Conclusion: Findings to go forward to schedule 1B.

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives

1 of 2

Fiscal Year: 2008-2009 Probationary Time Study

Purpose: To calculate time spent by "Various Administrators" on Stull Act. Source: SA 1.7-B Probationary Timesheets.

Findings:

Schoolsite Staff A B C D								*	Activi	*Activity Codes in Minutes	les in	Minu	es					
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*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

Conclusion: Findings will go forward to Schedule 1BB.

*Evaluation Criteria

(A) District standards and test results

Instructional techniques/strategies (B)

Adherence to curricular objectives (0)

Suitable learning environment

**Times were not used to calculate averages

PRINT DATE 1/5/2010 CBAD SA 08-09 Array

Fiscal Year: 2008-2009 Probationary Time Study

Purpose: To calculate time spent by "Various Administrators" on Stull Act.

Source: SA 1.7-B Probationary Timesheets. Findings:

		L				*Activ	*Activity Codes in Minutes	des	Min	Ifec			
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	Bill Lord	30				30							
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*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor Code 17- District reporting

*Evaluation Criteria

Instructional techniques/strategies

Adherence to curricular objectives (A) District standards and test results
(B) Instructional techniques/strateg
(C) Adherence to curricular objectiv
(D) Suitable learning environment Suitable learning environment

**Times were not used to calculate averages

Conclusion: Findings will go forward to Schedule 1BB.

Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

Please re	port below	the <i>averag</i>	ge amount of tir he mandated p	me spent	(in minu	ites) by	vou to i	mnlom	
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Code 14	Classroor	n observation	n of instructor			5	20	20	5
Code 15	Post-obse	ervation confe	erence with instruc	ctor		10	10		-
ode 16	Final conf	erence with i	nstructor				<u> </u>	10	10
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Revised July 2008

Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12) Routine Evaluations of Instructors

PROBATIONARY

Reimbursable Activities Codes: Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District reporting Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps: Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 11 Preparing or the evaluation Code 11 Preparing for the evaluation Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District Reporting Code 18 Pre-observation conference with instructor Code 19 Pre-observation conference with instructor Code 19 Post-observation conference with instructor Code 10 Post-observation conference with instructor Code 11 Classroom observation of instructor Code 12 Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District Reporting MPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record on the verported actual data or have provided a good faith estimate which you "certify (or declare) under penal formation." This informylation is used for coxidapcolpiting purposes only. PLEASE USE BLUE INK				47-41-7-1				
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Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Final conference with instructor District Reporting MPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of the for state mandates in order for the district to receive reimbursement. Your signature on this form certifies the priority under the laws of the State of California to be true and correct based on your personal knowledge or includes Signature. District Reporting	ode 14	Classroom observation of instru	ctor					
Code 16 Final conference with instructor 15	ode 15	Post-observation conference with	th instructor					10
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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

PROBATIONARY

Please report below the average amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program. Fiscal Year: 06-07 07-08 Circle the years for which you are responding Reimbursable Activities Codes: Code 11 Preparing for the evaluation **Evaluation Criteria:** Code 12 Goals and objectives conference with instructor (A) district standards and test results (B) instructional techniques/strategies Code 13 Pre-observation conference with instructor (C) adherence to curricular objectives Code 14 Classroom observation of instructor (D) suitable learning environment Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District reporting CLASSROOM TEACHER TIME IS NOT REIMBURSED Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps: Average Time in Minutes В С D Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor 乃(Code 17 District Reporting EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK Employee Signature if you have any questions, please contact PLEASE SUBMIT THIS INFORMATION BY ; TO COPYRIGHT 2004 SixTen and Associates

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AVERAGE Time Record for Mandated Costs 498/83 The Stuli Act (K-12) Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

PROBATIONARY

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AvERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Code 12	Goals and objectives	conference with instruc	ctor	15	15		
Code 13	Pre-observation confe	erence with instructor		1/2		1	15
Code 14	Classroom observatio	n of instructor			12	/2	15
Code 15	Post-observation conf	erence with instructor		12	12	12	12
Code 16	Final conference with i	nstructor		12	12	12	12
Code 17	District Reporting			18	18	18	5
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Schedule 1C Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2008-2009 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Administrators".

Source: Schedule 1CC Permanent and SA 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B&C
# of reimbursable K-12 evaluations	189	189
Avg. time p/ evaluation preparation	16.3	33.3
Total Time (in minutes)	3087	6300
Per Hour	60	60
Hours Worked (Code 11)	51.5	105.0
# of reimbursable K-12 evaluations	189	189
Avg. time p/ goals & obj. conf. with instructor	17.3	35.0
Total Time (in minutes)	3276	6615
Per Hour	60	60
Hours Worked (Code 12)	54.6	110.3
	0-4.0	110.3
# of reimbursable K-12 evaluations	189	189
Avg. time p/ pre-observation conf. with instructor	14.0	28.3
Total Time (in minutes)	2646	5355
Per Hour	60	60
Hours Worked (Code 13)	44.1	89.3
# of reimbursable K-12 evaluations	189	189
Avg. time p/ classroom observation of instructor	25.0	45.0
Total Time (in minutes)	4725	8505
Per Hour	60	60
Hours Worked (Code 14)	78.8	141.8
		*
# of reimbursable K-12 evaluations	189	189
Avg. time p/ post-observation conf. with instructor	18.3	30.0
Total Time (in minutes)	3465	5670
Per Hour	60	60
Hours Worked (Code 15)	57.8	94.5
# of reimbursable K-12 evaluations	189	189
Avg. time p/ final conf. with instructor	20.0	38.3
Total Time (in minutes)	3780	7245
Per Hour	60	60
Hours Worked (Code 16)	63.0	120.8
# of reimbursable K-12 evaluations		189
Avg. time p/ district reporting	4.1	16.7
Total Time (in minutes)		3150
Per Hour		60
Hours Worked (Code 17)		52.5

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Ode 16- Final conference with instructor

bde 17- District reporting

Conclusion: Findings will go forward to Combined Schedule 1.

*Evaluation Criteria

District standards and test results (A) (B)

Instructional techniques/strategies

(C) Adherence to curricular objectives

CBAD SA 08-09 Array

498/83 The Stull Act (K-12) Routine Evaluations of Instructors DISTRICT STATISTICS REPORT

\mathcal{A}	PISTRICT STATISTICS R
District/COE: Car 15had	United Sch. DIST.

The following cost accounting statistics will assist the calculation of the districts reimbursement. Please report the required information in the spaces provided.

Certificated Instructors Statistical Data	Fiscal Year			
	06-07	07-08	08-09	
1 A K-12 Probationary Teachers- Total Number			 	
1 B K-12 Permanent Teachers- Total Number			6	
1 C K-12 Temporary Teachers- Total Number			484	
1 D K-12 Classroom Teachers- A + B+ C = Total Number			29	
2 A K-12 Probationary Teachers- Total Number Evaluated			519	
2 B K-12 Permanent Teachers- Total Number Evaluated			5	
2 C K-12 Temporary Teachers- Total Number Evaluated			189	
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated			38	
* K-12 Categorical/Grant Teachers- Total Number Evaluated			232	
Reimbursable K-12 Evaluations- Line 2 D subtract Line 3			5	
			227	
C. 54444.2 Migrant children E.C. 54425(b) Chapter 1 Federal compensate E.C. 54724 Drop-out Prevention E.C. 5.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant- funded p	ersonnel	ate Catego	prical	
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RIGHT 2004 SixTen and Associates

Revised July 2008

Schedule 1CC Carlsbad Unified School District 498/83 Stull Act Permanent Fiscal Year 2008-2009 3 year Time Study

Prupose: To calculate a 3 year rolling average to be used for the 2008-2009 Stull Act.

Source: Schedule 5.

Findings:

Permanent Evaluations

*Activitiy	2006	2006-2007		2007-2008		2008-2009		erage
Codes in Minutes	A	B&C	A	B&C	А	B&C	А	B&C
CODE 11	15.0	30.0	14.0	30.0	20.0	40.0	16.3	33.3
CODE 12	20.0	40.0	12.0	20.0	20.0	45.0	17.3	35.0
CODE 13	12.0	20.0	15.0	30.0	15.0	35.0	14.0	28.3
CODE 14	30.0	55.0	15.0	35.0	30.0	45.0	25.0	45.0
CODE 15	20.0	30.0	20.0	35.0	15.0	25.0	18.3	30.0
CODE 16	20.0	35.0	20.0	35.0	20.0	45.0	20.0	38.3
CODE 17		15.0		15.0		20.0		16.7

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

Conclusion: Findings to go forward to Schedule 1C.

*Evaluation Criteria

- District standards and test results
- (B) Instructional techniques/strategies
- Adherence to curricular objectives

Purpose: To calculate time spent by "Various Agninistrators" on Stull Act. Source: SA1.7-C Permanent Timesheets. Findings:

		L					ŀ									
							¥	ctivity	Code	*Activity Codes in Minutes	inutes					
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Carlsbad High	Marjorie Giordani	15				15			7	15	-	-	5			L
	Bill Lord	15				15				15	-	-	09			
	Margaret Stanchi	20				20				15		F	**240	la		
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*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Final conference with instructor Code 17- District reporting Code 16-

**Times were not used to calculate averages

Evaluation Criteria

(A) District standards and test results

(B) Instructional techniques/strategies(C) Adherence to curricular objectives

(D) Suitable learning environment

1 of 2

Conclusion: Findings will go forward to Schedule 1CC.

Fiscal Year: 2008-2009 Permanent Time Study 498/83 Stull Act

Purpose: To calculate time spent by "Various Administrators" on Stull Act. Source: SA1.7-C Permanent Timesheets. Findings:

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	Bill Lord	30	* (a			30					-		
	Margaret Stanchi	40				30				***			
Carlsbad Village Academy Keith Holley	Keith Holley	30	30	30	9	8 8	8	8	5	2 8		8	1
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*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Post-observation conference with instructor Code 16- Final conference with instructor Code 15-

Code 17- District reporting

Conclusion: Findings will go forward to Schedule 1CC.

*Evaluation Criteria

Instructional techniques/strategies

Adherence to curricular objectives (A) District standards and test results
(B) Instructional techniques/strateg
(C) Adherence to curricular objectiv
(D) Suitable learning environment Suitable learning environment **Times were not used to calculate averages

2 of 2

PRINT DATE 1/5/2010 CBAD SA 08-09 Array

Revised July 2008

Employee AvERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12) Routine Evaluations of Instructors

PERMANENT

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Code 13	Pre-observation conference with instructo)r	10	10	10	10
Code 14	Classroom observation of instructor		<u> </u>	20	20	5
Code 15	Post-observation conference with instruct	or	10	10	10	10
Code 16	Final conference with instructor		10	20	20	10
Code 17	District Reporting		5	5	5	15
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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

PERMANENT

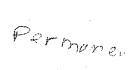
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Code 13	Pre-obs	ervation conference with instruct	tor	10	10	10	10
Code 14	Classroo	om observation of instructor			20	20	10
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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

PERMANENT

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498/83 The Stull Act (K-12) Routine Evaluations of Instructors



Please report below the <i>average</i> amount of time spent (in minurathe reimbursable activities for the mandated program. District/COE Schoolsite Employee Name 23 (40) Telephone # 12mo/11mo/10mo/hrly Work year length(circle) Fiscal Years Circle the years	Departn (VV tion Title	nent/Lo pu	cation	AUER-
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Code 14 Classroom observation of instructor		30	30	10
Code 15 Post-observation conference with instructor	10	10	(0	10
Code 16 Final conference with instructor	10	10	10	10
Code 17 District Reporting				
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Revised July 2008

Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AvERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee A√ERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Employee AvERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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498/83 The Stull Act (K-12) Routine Evaluations of Instructors

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

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Revised July 2008

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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

PERMANENT

(,), (rsable activities for the manda		a 0			
District/C(Pao Departme	CKIR	\mathcal{M}		
Robe	mt Davida	Depaπme				
Employee		_ Phi	ncir	19 l		
		Exact Pos	ition Title	<u> </u>	<u> </u>	
331-6	200 <u>12mo/11mo/10m</u>	o/hrly Fiscal Year		_		
Telephone	Work year length	/-t1)	,	٠. ٠		8-09
	<u> </u>	I(CITCIE) Circle the year	ars for whi	ch you ar	e respo	nding.
Reimbursabl	e Activities Codes:	Evai	uation Crit	erio:		
Code 11 Pr	eparing for the evaluation	/ 4 \	district star	<u>eria.</u> Idards ar	nd test r	eculte
Code 13 Pro	pals and objectives conference w e-observation conference with ins	idi ilistructor (B) il	nstructiona	al techniq	ues/stra	ategies
Code 14 Cla	assroom observation of instructor	(C) 5	adherence	to currici	ular obid	ectives
Code 15 Po	st-observation conference with in		uitable lea	ıming en	vironme	∍nt
Code 16 Fin	al conference with instructor	.01.0101		- :		
1	strict reporting	CLASSROOM TEACH	ER TIME IS	NOT RE	iMBURS	ED
Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:		- 1	Average Time in Mini			
			А	В	С	Ь
Code 11	Preparing for the evaluation				 	+
						130
Code 12	Goals and objectives conferenc	e with instructor		 	 	
						160
Code 13	Pre-observation conference with	instructor		 		
·	<u> </u>					130
Code 14	Classroom observation of instruc				<u> </u>	100
	oracorociii obaervation or institut	JIOT			ı 	30
Code 15	Don't share of the				 -	100
00de 15	Post-observation conference with	h instructor				30
Code 16						
Code 16	Final conference with instructor	•				00
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Code 17	District Reporting					
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MPLOVEE OF	DTIFICATION					
u have reporte	RTIFICATION: The State of Californ andates in order for the district to reced actual data or have provided a good laws of the State of California to be is information is used for cost according	odd faith estimate which you	signature o	n this forn declare)	n certifie	rd of s that enalty of
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ormation." Th nployee Signa	ture	Mining pulposes only, PLEA	Date		0.0	α 0

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498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

PERMANENT

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Please r	eport below the average amount of time s bursable activities for the mandated progr	spent (in minut	es) hv	unu ta ir		
/\ /\	bursable activities for the mandated progr					nt each
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Employe	e Name	Pri	nig	pm		
(A60) 331	6500 (12 ma/11 ma/10 ma/1	Exact Positi	on Titl	e		
Telephon		Fiscal Year:	06-01	7 07-	00 0	\C \c \-
· oropriu	ne # Work year length(circle)	Circle the years	for wh	ich vou a	UO U	08-09
Reimbursa	ble Activities Codes:			 	ue respo	inding.
Gode 11	reparing for the evaluation	Evalua	tion Cri	eria:		
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ا را علاق	Te-UDServation conterence with instruction	(D):1112	uction	al technii	Oues/etr	atonios
Code 15 F	Classroom observation of instructor	(D) suit	lable lea	to curric	wironma Wironma	ectives
Code 16 F	inal conference with instructor			9 01	ivii Otiitte	ar it
Code 17 D		ROOM TEACHER		·.	•	
Allocate th		ROOM TEACHER	TIME IS	NOT RE	IMBURS	ED
each of the	following evaluation steps:	or	Av	erage Ti	me in Mi	nutes
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Code 12	Goals and objectives conference with instru	etor			 	+
			U	0)	(0	10
Code 13	Pre-observation conference with instructor			 	 	+
				10		
Code 14	Classroom observation of instructor					
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Code 15	Post-observation conference with instructor					
		1		15	ĺ	
Code 16	Final conference with instructor			[]		·
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Code 17	District Reporting					·
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ou have any	questions, please contact					
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	XTen and Associates	_,,,,				·
2004 3/	ATEN AND ASSOCIATES					

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

PERMANENT

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/C	COE	Departmen	<u></u>	ميد\ 	/	- 4 / /	以うな
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Employe		Prox	://				
ANIDIOAG	e Name	Exact Posit	ion Titl		 -		
740-771-	(*389 12mo/11mo/10mo/hrly			•	/)
Telephor	work year ength(circle)	Fiscal Year:	06-0	7 07	-08/(08-09 🗸	/ //
	Work year length(circle)	Circle the year	s for wh	ich you	are resp	onding	<u> </u>
Reimbursa	ble Activities Codes:					9.	
Code 11 F	reparing for the evaluation	<u>Evalua</u>	ation Cri	teria:			=
Code 12 (Boals and objectives conference with include	(A) dis	strict star	ndards a	and test	results	
200C 13 -	16-00Servation conterence with instructed	'' (₽).'INS	itruction:	al techn	iques/str	ratenies	
Code 14 (Jassroom observation of instructor	(C) au	nerence	to curri	cular ob	iectives	-
Code 15 P	OST-Observation conference with instructor	(D) su	itable lea	arning e	nvironm	ent	
COME 10 L	Itial conterence with instructor						•
ode 17 D	indeigh and the	ROOM TEACUES	TIBE -	· 84			
Allocate the	gardiane fille Spent on each catorian /* b/ c	ROOM TEACHER	LIME IS	NOT R	EIMBUR	SED	
each of the	following evaluation steps:	Γ.	Av	erage Ti	ime in M	inutes	1
			A		T		-
Code 11	Preparing for the audit "		 ^	В	C	D]
= • •	Preparing for the evaluation						
N-1 15							
Code 12	Goals and objectives conference with instruc	ctor		 	+	 	4.
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Code 13	Pre-observation conference with instructor			'/	1//	13	·
	objective with instructor		,	l	1		
Code 14			12.	12	1/2	12	•
,oue 14	Classroom observation of instructor					†	
			12	12	12	12	
ode 15	Post-observation conference with instructor				-	10	
	- The state of the		ا من]	
ode 16	Einel au f		12	12	12	12	
Oue 10	Final conference with instructor		. 1				
			18	18	18	18	
ode 17	District Reporting				<u> </u>		
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	ixTen and Associates 53	O I			Revised	July 2008	

498/83 The Stull Act (K-12)
Routine Evaluations of Instructors

PERMANENT

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District/C		<u> </u>	VME		CCC	P
	0	Departm	ent/Loca	tion	0000	<u> </u>
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Employe	e Name	Exact Po		TY	unc	u ya 1
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Tolonbar	2012mo/11mo/10mo/h	<u>ırly</u> Fiscal Yea	ır: 06-0	7 07-	00 0	
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Paimhumai			Sata IOI AN	nen you a	re respo	onding.
Code 11	ole Activities Codes:	Eva	luation Cr	iteria:		
Code 12 G	reparing for the evaluation		district sta	indards a	nd tact :	raa de
Code 13 P	Goals and objectives conference with increase with instruction conference with instruction	nstructor (B)	instruction	al technic	illes/str	esuits
Code 14 C	lassroom observation of instructor	(0)	aunerence	e to curric	ular obi	ectives
Code 15 P	ost-observation conference with instru	(D)	suitable le	arning en	vironme	ent
Code 10 F	Inal conference with instructor	ICIOF				
Code 17 D	interior was in the	CI ASSPOON TEACH				
Allocate the	average time spent on each criterion	CLASSROOM TEACH	ER TIME I	S NOT RE	IMBURS	ED
each of the	following evaluation steps:	(A-D) for	A	verage Tir	ge Time in Minutes	
			A	В	С	D
Code 11	Preparing for the evaluation				+	
			1	1		
Code 12	Goals and objectives conference with				ļ	-
	and objectives contendice will	in instructor	11-7	15	l	
Code 13			150	150	150	1450
	Pre-observation conference with ins	tructor];		
			450	1450	445	450
Code 14	Classroom observation of instructor					
• •			600	Loc	600	660
ode 15	Post-observation conference with ins	fruster	 	-		<u> </u>
	- Wat in the second of the sec	n actor	lez		11.0	USD
ode 16	Final conference with instructor		480	420	430	400
	interconference with instructor			1.		
			300	300	300	ZGD
ode 17	District Reporting	•				
			200	300	300	300
DI OVEE OF						
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	is information is used for dost accounting	purposes only purposes	your perso	nal knowle	edge or	, 0,
oloyee Signa	ature	51mj. i LLM	_	FUE HANK		
			Date	1 / /. /		

Schedule 2B Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2008-2009 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Administrators".

Source: Schedule 2B and 1.8-2.

Findings:

Various Administrators

# of reimbursable K-12 re-evaluations Avg. time p/ evaluation preparation Total Time (in minutes) Per Hour Hours Worked (Code 21)	1 40 40 60 0.7
# of reimbursable K-12 re-evaluations Avg. time p/ meeting(s) with employee Total Time (in minutes) Per Hour Hours Worked (Code 22)	1 35 35 60 0.6
# of reimbursable K-12 re-evaluations Avg. time p/ observation(s) of the employee Total Time (in minutes) Per Hour Hours Worked (Code 23)	1 40 40 60 0.7
# of reimbursable K-12 re-evaluations Avg. time p/ reducing evaluation to writing Total Time (in minutes) Per Hour Hours Worked (Code 24)	1 45 45 60 0.8
# of reimbursable K-12 re-evaluations Avg. time p/ post-evaluation conf. with the employee Total Time (in minutes) Per Hour Hours Worked (Code 25)	1 60 60 60 1.0
# of reimbursable K-12 re-evaluations Avg. time p/ filing evaluation and recordkeeping Total Time (in minutes) Per Hour Hours Worked (Code 26)	70 70 60 1.2

*Activity Codes

Code 21- Preparing for the evaluation

Code 22- Meeting(s) with the employee

Code 23- Observation(s) of the employee

Code 24- Reducing the evaluation to writing

Code 25- Post-evaluation conference(s) with the employee

Code 26- Filing evaluation and recordkeeping

Conclusion: Findings will go forward to the SA-2.

Schedule 2BB Carlsbad Unified School District 498/83 Stull Act Fiscal Years: 2008-2009 Time Study

Purpose: To summarize time spent by "various administrators" on Stull Act.

Source: SA 1.7-2 Average Timesheets.

Findings:

a		*Activity Codes					
Schoolsite	Staff	21	22	23	24	25	26
Aviara Oaks Elementary							
Aviara Oaks Middle	Carolyn Millikin	50	50	50		50	75
Buena Vista	Tina Howard	**720	**900	**4500	**1800	120	120
Calavera Hills Elementary			- 550	1000	1000	120	120
Calavera Hills Middle				 			
Carlsbad High	Margaret Stanchi	30	20	30	45	15	15
Carlsbad Village Academy					70	10	15
Hope							
Jefferson							
Kelly							
Magnolia	1. /						
Pacific Rim							
Poinsettia							
Valley Middle							
District	Torrie Norton	20	40	30	10	10	5
Averages		40	35	40	45	62	70
Averages to be used		40	35	40	45	60	70 70

^{**}Times were not used to calculate averages

*Activity Codes

Code 21- Preparing for the evaluation

Code 22- Meeting(s) with the employee

Code 23- Observation(s) of the employee

Code 24- Reducing the evaluation to writing

Code 25- Post-evaluation conference(s) with the employee

Code 26- Filing evaluation and recordkeeping

Conclusion: Findings will go forward to Schedule 2B.

498/83 The Stull Act (K-12) Re-evaluations of Unsatisfactory Certificated Permanent Staff

DISTRICT STATISTICS REPORT

Statistical Data: Certificate Staff on Unsatisfactory St	atus	Fiscal Y	ear
	06-07	07-08	08-09
5 K-12 Permanent Instructors:			
A. Number on unsatisfactory status			3
B. Number of re-evaluations			/
6 Permanent Non-Instructors:			1
A. Number on unsatisfactory status			
3. Number of re-evaluations			 -
Reimbursable Re-evaluations 5 B + 6 B = Total			<u> </u>
on-reimbursable re-evaluations (Do not include in the statistics Any positions funded by these categoricals:	above)		
C. 52012 School Improvement E.C. 52065 Nat C. 52176 LEP/Bilingual E.C. 52852 Cod C. 54425(b) Chapter 1 Federal compensatory education C. 54444.2 Migrant Children E.C. 54724 Dro	ive American ordinated Categorical p-out Prevention Indian School Assistance	Act	
Any position that is grant-funded Re-evaluations of temporary and long-term substitute tea			
MPLOYEE CERTIFICATION: The State of California requires that scholar indicates in order for the district to receive reimbursement. Your signature and correct based on your personal knowledge or in the property of the prope	e) under penalty of perjury under penalty of perjury unformation." This information Date Position or Title	you have report	ted actual

Carely-SA 1.7-2

Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)

Re-evaluations of Unsatisfactory Certificated Permanent Staff

-Ishad USD	ADMS Department/Location	
Dyn Millikin	Princepal)
99 12mo/11mo/10mo/hrly	Fiscal Year: 06-07	07-08 08-09 you are re spondi ng
	VERAGE time for the fo	llowing out w
repairing for the evaluation		nowing activities
Meeting(s) with the employe	e	
Observation(s) of the emplo	yee	
Reducing the evaluation to v	writing	
Filing evaluation conference	s) with the employee	
- ming evaluation and record	keeping	-
average time spent on for following evaluation steps:		Average Time in Minutes
Preparing for the evaluation		50
Meeting(s) with the employee		50
Observation(s) of the employee		50
Reducing the evaluation to writing		30
Poet ovaluation t		
rost-evaluation conference(s) with the e	employee	50
Filing evaluation and recordkeeping		75
RTIFICATION: The State of California requires andates in order for the district to receive reimbed actual data or have provided a good faith established.	that school district personnel nursement. Your signature on the	is form cortifion that
ed actual data or have provided a good faith est e laws of the State of California to be true and o is information system for cost accounting purpo	timate which you "certify (or decorrect based on your personal	clare) under penalty of knowledge or
	Name 12mo/11mo/10mo/hrly Work year length(circle) Able Activities: Report evaluator A Preparing for the evaluation Meeting(s) with the employe Observation(s) of the employ Reducing the evaluation to a Post-evaluation conference Filing evaluation and record average time spent on for following evaluation steps: Preparing for the evaluation Meeting(s) with the employee Observation(s) of the employee Reducing the evaluation to writing Post-evaluation conference(s) with the employee Filing evaluation and recordkeeping	Department/Location Name (99 12mo/11mo/10mo/hrly Work year length(circle) Report evaluator AVERAGE time for the form the evaluation Meeting(s) with the employee Observation(s) of the employee Reducing the evaluation to writing Post-evaluation and recordkeeping Reverage time spent on for following evaluation steps: Preparing for the evaluation Meeting(s) with the employee Reducing the evaluation Meeting(s) with the employee Preparing for the employee Reducing the evaluation Meeting(s) with the employee Preparing for the evaluation Meeting(s) with the employee Filing evaluation conference(s) with the employee Filing evaluation and recordkeeping

498/83 The Stull Act (K-12)

Re-evaluations of Unsatisfactory Certificated Permanent Staff

Please report below the average amount of time spent (in minute of

CUS		B-Va	
District/CO		Department/Locatio	n
Tina	Howard	D. Contraction	A .
Employee N	Name	Princip	
		Exact Position Title	
23/13/4	# Work year length(circle)	Fiscal Year: 06-07	07-08 08-09
Telephone:	# Work year length(circle)	Circle the years for which	VOU are respondi-
Paimbumak	1- 4-4:44		
Code 21	le Activities: Report evaluator A	VERAGE time for the fo	ollowing activitie
Code 22	Topassing to the condition	the state of the s	9
Code 23	Meeting(s) with the employed	e ,	
Code 24	Observation(s) of the employ	/ee	2, 540
Code 25	Reducing the evaluation to w	vriting	Į.
Code 26	Post-evaluation conference(s Filing evaluation and recordk	s) with the employee	•
	ming evaluation and records	eeping	
Allocate the	average time spent on for		
each of the fo	ollowing evaluation steps:		Average Time
·	or stranger and population of the stranger of		in Minutes
Code 21	December 5 - 0		
Coue Zi	Preparing for the evaluation	•	1101
			121
Code 22	Meeting(s) with the employee		15h
	· · · · · · · · · · · · · · · · · · ·		154
Code 23	Observation(s) of the employee		0,500
	and at the enthoyee		75 hi
Code 24	Deduction		12 /11
	Reducing the evaluation to writing		1
		·	30 hr
ode 25	Post-evaluation conference(s) with the e	mplovee	
			2 hrs
ode 26	Filing evaluation and recording		11/2
	Filing evaluation and recordkeeping	•	171
			12 hr
IPLOYEE CER	TIFICATION: The State of California require	U- 4	
ta for state man	TIFICATION: The State of California requires to dates in order for the district to receive reimbut actual data or have provided a good faith estimate.	mat school district personnel	maintain a record of
U nave reported	actual data or have provided a good faith esti aws of the State of California to be true and cr	imate which you "certify (or de	nis form certifies tha
ormation." This	laws of the State of California to be true and confirmation is used for cost accounting purpor	orrect based on your persona	l knowledge or
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ipioyee Signatu	re	Date <u>7/1</u>	2/09

498/83 The Stull Act (K-12)

Re-evaluations of Unsatisfactory Certificated Permanent Staff

District/CO	La worker Strange	Department	Location	
11/19	KATTIMI TITHEM	DEIR	UPO 1	
Employee I	Varne	Exact Position	on Title	
Telephone	12mo/11mo/10mo/hrly	Fiscal Year:	06-07 07	-08 08-09
	# Work year length(circle)	Circle the years	for which you	are responding.
Reimbursab	le Activities: Report evaluator A			_
Code 21	Preparing for the evaluation	VERAGE time for	or the follo	wing activities:
Code 22	Meeting(s) with the employe	A :		
Code 23	Observation(s) of the employ	V66		
Code 24	Reducing the evaluation to v	ye c vritina		
Code 25	Post-evaluation conference(viilliy	0 1/0 0	,
Code 26	Filing evaluation and records	s, will the empli	byee	
		.coping		
Allocate the	average time spent on for			
each of the fo	ollowing evaluation steps:		i	Average Time
				in Minutes
0-1-04				
Code 21	Prenaring for the avaluation			
Code 21	Preparing for the evaluation			30
				30
Code 21 Code 22	Preparing for the evaluation Meeting(s) with the employee			30
				30
Code 22	Meeting(s) with the employee			30
Code 22				30 20 30
Code 22 Code 23	Meeting(s) with the employee Observation(s) of the employee			30 20 30
Code 22 Code 23	Meeting(s) with the employee			30 20 30
Code 23	Meeting(s) with the employee Observation(s) of the employee Reducing the evaluation to writing			30 20 30 45
Code 23	Meeting(s) with the employee Observation(s) of the employee Reducing the evaluation to writing	employee		30 20 30 45
Code 23 Code 24	Meeting(s) with the employee Observation(s) of the employee	employee		30 20 30 45 15
Code 23 Code 24 Code 25	Meeting(s) with the employee Observation(s) of the employee Reducing the evaluation to writing Post-evaluation conference(s) with the experiments of the employee	employee		30 20 30 45 15
	Meeting(s) with the employee Observation(s) of the employee Reducing the evaluation to writing	employee		30 20 30 45 15

498/83 The Stull Act (K-12)

Re-evaluations of Unsatisfactory Certificated Permanent Staff

Please report below the average amount of time spent (in minutes) by you to implement each of the reimbursable activities requested for the mandated program. CUSD Personnel District/COE Department/Location Porrie Norton **Employee Name Exact Position Title** 760-331-5025 (12mo/11mo/10mo/hrly Fiscal Year: 06-07 07-08 08-09 Telephone # Work year length(circle) Circle the years for which you are responding. Reimbursable Activities: Report evaluator AVERAGE time for the following activities: Code 21 Preparing for the evaluation Code 22 Meeting(s) with the employee Code 23 Observation(s) of the employee Code 24 Reducing the evaluation to writing Code 25 Post-evaluation conference(s) with the employee Code 26 Filing evaluation and recordkeeping

Allocate the average time spent on for each of the following evaluation steps:		Average Time in Minutes	
Code 21	Preparing for the evaluation		20
Code 22	Meeting(s) with the employee	+3x	40
Code 23	Observation(s) of the employee		30
Code 24	Reducing the evaluation to writing		10
Code 25	Post-evaluation conference(s) with the employee		10
Code 26	Filing evaluation and recordkeeping		5

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your plantable
data for state mandates in order for the district to receive reject to receive reject.
You have reported actual data or have provided a standard ment. Your signature on this form certifies that
perjury under the laws of the State of California to Law and definite which you certify (or declare) under penalty of
information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK
)ale 7 - 11 1 1
If you have any questions, please contact Mury Kuhn, at 740-331-5026
PLEASE SUBMIT THIS INFORMATION BY
TO

498/83 The Stull Act (K-12)
Re-evaluations of Unsatisfactory Certificated Permanent Staff

Please report below the reimbursable ac	the average amount of time s tivities requested for the mand	pent (in minute	s) by you t	o implement each of
CUSD District/COE		Purson	nel	
Torru Nor Employee Name	ton	Department/	upt	
Limpioyee Name		Exact Position	n litle	
Telephone #	12mo/11mo/10mo/hrly Work year length(circle)	Fiscal Year:	06-07 0	7-08 08-09 ou are responding.
Reimbursable Activ	ities: Report evaluator A	/EDAOE ()		
Code 21	rities: Report evaluator AN Preparing for the evaluation	PERAGE time t	or the fol	lowing activities:
Code 22	Meeting(s) with the employe	•		
Code 23	Observation(s) of the employ	E.		
Code 24	Reducing the evaluation to w	/ee		
Code 25	Post-evaluation conference(s	niung		•
Code 26	Filing evaluation and records	eeping	oyee	
Allocate the average each of the following	time spent on for evaluation steps:	#	+ 2	Average Time in Minutes

Allocate the average time spent on for each of the following evaluation steps:		Average Time in Minutes	
Code 21	Preparing for the evaluation	20	
Code 22	Meeting(s) with the employee	4	
Code 23	Observation(s) of the employee	2	
Code 24	Reducing the evaluation to writing	4	
Code 25	Post-evaluation conference(s) with the employee	(
Code 26	Filing evaluation and recordkeeping	5	

EMPLOYEE OFFITIES THE
EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK Employee Signature Date 9-30-09 I you have any questions, please contact LUCY TO PLEASE SUBMIT THIS INFORMATION BY 10-15-16-17-16-18-18-18-18-18-18-18-18-18-18-18-18-18-
170

498/83 The Stull Act (K-12)
Re-evaluations of Unsatisfactory Certificated Permanent Staff

Please report below the reimbursable ac	the average amount of time s tivities requested for the mand	spent (in minutes) by you to implement each o
District/COE Torrie No. Employee Name 740-331-5000	rton	Personnel Department/Location Asst. Supt Personnel Exact Position Title
Telephone #	Work year length(circle)	Fiscal Year: 06-07 07-08 08-09 Circle the years for which you are responding.
Reimbursable Active Code 21 Code 22 Code 23 Code 24 Code 25 Code 26	Preparing for the evaluation of the evaluation of the employe observation of the employe Reducing the evaluation to whether the evaluation to whether the evaluation conference of the evaluation and records of the eva	yee Viiting S) with the employee
Allocate the average	time spent on for	

Allocate the average time spent on for each of the following evaluation steps:		Average Time in Minutes
Code 21	Preparing for the evaluation	70
Code 22	Meeting(s) with the employee	20
. 		4
Code 23	Observation(s) of the employee	
Code 24	Reducing the evaluation to writing	20
Code 25	Post-evaluation conference(s) with the employee	20
Code 26	Filing evaluation and recordkeeping	5

EMPLOYEE CERTIFICATION: The State of data for state mandates in order for the disyou have reported actual data or have properjury under the laws of the State of Californiation." This information is used for complete Signature	vided a good faith estimate which y ornia to be true and correct based cost accounting purposes only. PL	or signature on this form certifies that you "certify (or declare) under penalty of
PLEASE SUBMIT THIS INFORMATION BY	·; то	
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Revised July 2007

Employee Sign-in Record Sheet for Mandated Costs 498/83 The Stull Act (K-12)

	Training of E	<i>v</i> aluators	
District/COE	50	_ Fiscal Year:	2008 - 09
Learning Keys	- Data Walks	AOMS	
Type of Training Activit	y	Training Location	
October 2008		800 900 a.	m
Date of Activity		Start and End Times	· · · · · · · · · · · · · · · · · · ·
DIGITAL STATE OF THE		T	
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Namo Koux	ASST. PRINCIPAL	AOMS	Trainer (rainee
2 KALK			Trainer Trainee
3			Trainer Trainee
4		,	Trainer Trainee
5			Trainer Trainee
6			Trainer Trainee
7			Trainer Trainee
8			Trainer Trainee
9			Trainer Trainee
10			Trainer Trainee
Provide a brief description of	the training curriculum or attac	ch copy of agenda and mater	ials:
The District training coordina	tor for this event, or another di	strict employee, needs to sign	n below.
ave reported actual data or have eriury under the laws of the Sta	The State of California requires to the district to receive reimbursemment of provided a good faith estimate and court of California to be true and court used for cost accounting purposes.	ient. Your signature on this for which you "certify (or declare priect based on your personal ses only. PLEASE USE BLUE	m certifies that you under penalty of
you have any questions, pleas	e confact	, at	
LEASE SUBMIT THIS INFORM	MATION BY	; TO	
OPYRIGHT 2004 SixTen and Associates	;		Period luis 2007

Com Dave

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Employee Sign-in Record Sheet for Mandated Costs 498/83 The Stull Act (K-12)

Training of Evaluators Fiscal Year: 08-09ataWalks Training Location Oct. 2008 Date of Activity DISTRICT EMPLOYEE DISTRICT EMPLOYEE DISTRICT EMPLOYEE 31 CODES 32 NAME (PRINT) POSITION/TITLE WORK LOCATION (circle one) Principal HOMS Trainer Trainee Trainer Trainee 3 Trainer Trainee Trainer Trainee Trainer Trainee Trainer Trainee Trainer Trainee 8 Trainer Trainee 9 Trainer Trainee Trainer Trainee Provide a brief description of the training curriculum or attach copy of agenda and materials: develop District training coordinator for this event, or another district employee, needs to sign below. EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

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Employee Signature <u>Landiful</u>

If you have any questions, please contact ____

PLEASE SUBMIT THIS INFORMATION BY

Revised July 2007

_____; TO __

Employee Sign-in Record Sheet for Mandated Costs 498/83 The Stull Act (K-12)

I raining of Evaluates	
Training of Evaluators	c

District/COE (C)		e e e e e e e e e e e e e e e e e e e	08/06		
	,	Fiscal Year:	00/09		
EVAMIATION	75	CH5			
Type of Training Activity	1, 2	Training Location			
Data of Activity	/ 0	1:00 - 2:30	2		
Date of Activity		Start and End Times			
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)		
1 Tom Bloom guisi	ASST PEIN	0.45	Traine Traines		
2 MALDIA GIOLOS		CH5	Trainer (Trainee)		
3 B/11 LOLD	11 11	CHS	Trainer Trainee		
4			Trainer Trainee		
5			Trainer Trainee		
6		1	Trainer Trainee		
7			Trainer Trainee		
8			Trainer Trainee		
9			Trainer Trainee		
10			Trainer Trainee		
Provide a brief description of	the training curriculum or atta	Ch copy of agends and materi	nier Hallie		
		or agenda and malen	ais.		
The District training coordinate	or for this event, as each "				
The District training coordinate					
MPLOYEE CERTIFICATION: To state mandates in order for the	ne State of California requires to	that school district personnel ma	aintain a record of data		
or state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you ave reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of erjury under the laws of the State of California to be true and correct based on your personal knowledge or formation." This information is used for cost accounting purposes only. PLEASE USE BLUE INK					
mployee Signature	Sut DAL	//	_ / //		
you have any questions, please contact					
LEASE SUBMIT THIS INFORMATION BY; TO;					
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Employee Sign-in Record Sheet for Mandated Costs 498/83 The Stull Act (K-12) Training of Evaluators

District/COE COSD		Fiscal Year:	Top. 08-09
Cestiticated tent	Porcets	_ Dolvm=	
Type of Training Activity		Training Location	
8-4-09	<u> </u>	_ 8 older	
Date of Activity		Start and End Times	
			——————————————————————————————————————
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Jasa Woods	Pringel	Uns	Trainer Trainee
2 JASON MORAL	<u>45</u>		Trainer Trainee
3			Trainer Trainee
4			Trainer Trainee
5			Trainer Trainee
6			Trainer Trainee
7			Trainer Trainee
8			Trainer Trainee
9	· · · · · · · · · · · · · · · · · · ·	-	Trainer Trainee
10			Trainer Trainee
Provide a brief description of	the training curriculum or atta	ch copy of agenda and mater	als:
	··········		
The District training coordinat	or for this event, or another d	introt omelouse	
EMPLOYEE CERTIFICATION: T	he State of California requires	that school district personnel m	aintain a record of data
for state mandates in order for the have reported actual data or have positive under the laws of the Sta	e biovided a dood faith estima	le which you "cortify (or doctor-	\
information." This information is	te of California to be true and o pised for cost accounting purpo	Offect based on your nemonal.	knowdodoo
Employee Signature		Date	101.09
If you have any questions, please	e contact	, at	
PLEASE SUBMIT THIS INFORM	IATION BY	; TO	
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MANDATE REIMBURSEMENT SERVICES PRODUCTIVE HOURLY RATE UPDATE

Note: Please provide the rates for the FY: 08-09, and the missing rates for FY:07-08.

SCHOOL DISTRICT NAME:

Carlsbad Unified School District

Name	Title	07-08	60-80	
	AVERAGE ACCOUNTING TECHNICIAN	\$ 29.02	69	28.50
	AVERAGE ADMINISTRATIVE ASSISTANT	\$ 30.95	€	30.66
	AVERAGE ADMINISTRATOR (Principal/Vice Principal)	\$ 67.72	€9	73.24
	AVERAGE CLERICAL STAFF (Office Asst., Admin. Sec., Health Tech., Attend. Tech.)	\$ 25:36	· \$	24.49
	AVERAGE CLERICAL STAFF (Office Asst., Admin. Sec.)	\$ 25.48	↔	24.99
	AVERAGE CLERK (ALL CLERKS)	\$ 24.16	€	23.67
	AVERAGE COUNSELOR	\$ 56.08	₩.	65.27
	AVERAGE DIRECTOR	\$ 72.51	\$	74.82
	AVERAGE GUIDANCE TECH	\$ 24.66	€9	24.45
	AVERAGE HEALTH TECH	\$ 26.31	€	25.48
	AVERAGE INSTRUCTIONAL AIDE	\$ 22.76	8	22.35
	AVERAGE OFFICE ASSISTANT	\$ 22.06	€	20.47
	AVERAGE PRINCIPAL	\$ 71.89		75.09
	AVERAGE PSYCHOLOGIST	42		T

1 of 9

M. JDATE REIMBURSEMENT SERVICES

PRODUCTIVE HOURLY RATE UPDATE

Note: Please provide the rates for the FY: 08-09, and the missing rates for FY:07-08.

SCHOOL DISTRICT NAME:

Carlsbad Unified School District

				Г
Name	Title	07-08	08-00	1
	AVERAGE ACCOUNTING TECHNICIAN	\$ 29.02	\$ 24.79	6
	AVERAGE ADMINISTRATIVE ASSISTANT	\$ 30.95	\$ 25.06	
	AVERAGE ADMINISTRATOR (Principal/Vice Principal)	\$ 67.72	\$ 83.07	T ~
	AVERAGE CLERICAL STAFF (Office Asst., Admin. Sec., Health Tech., Attend. Tech.)	\$ 25.36	\$ 17.34	
	AVERAGE CLERICAL STAFF (Office Asst., Admin. Sec.)	\$ 25.48	\$ 20.12	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \
	AVERAGE CLERK (ALL CLERKS)	\$ 24.16	\$ 27.40	Τ_
	AVERAGE COUNSELOR	\$ 56.08	\$ 47.21	Т_
	AVERAGE DIRECTOR	\$ 72.51	\$ 68.49	T_
-	AVERAGE GUIDANCE TECH	\$ 24.66	\$ 20.12	1 -
	AVERAGE HEALTH TECH	\$ 26.31		
	AVERAGE INSTRUCTIONAL AIDE	\$ 22.76		
	AVERAGE OFFICE ASSISTANT	\$ 22.06	\$ 17.34	
	AVERAGE PRINCIPAL	\$ 71.89	\$ 76.01	
	AVERAGE PSYCHOLOGIST		\$ 47.21	

27.12

RETIRED

SPECIAL PROJECTS COORDINATOR-RETIRED 7/1/07

CAMPBELLLAHR, BETTY J

CARTAGENA, RUTH

ADMINISTRATIVE ASSISTANT

2 of 9

Six and Associates

M. IDATE REIMBURSEMENT SERVICES

Name	Title	07-08	08-00	
	AVERAGE REGISTRAR			
	AVERAGE SECRETARY			
	AVERAGE SUBSTITUTE TEACHER		₩	12.86
	AVERAGE VICE-PRINCIPAL	\$ 63.55	\$	66.43
	SUBSTITUTE TEACHER (DAILY RATE WITH BENEFITS)	\$ 85.00	€>	102.85
AAKER, CHARLES	DIRECTOR, FACILITIES	\$ 66.40	\$	62.39
ADAMS, GWEN	TEACHER	\$ 65.81	49	70.88
AGRAMONTE, DENISE	ADMINISTRATIVE ASSISTANT		€9.	33.27
AHLE, STEPHEN	PRINCIPAL (POINSETTIA)	\$ 71.23	€	79.28
ARMSTRONG, THERESA (TRESSIE)	ASSISTANT PRINCIPAL (KELLY ELEM)	\$ 60.76	€	69.69
ASHTON, BRIAN	COUNSELOR	\$ 60.09	€9	64.72
BAIMA, LANE	PHYSICAL PERFORMANCE TEST COORDINATOR (TEACHER)	\$ 35.60	es.	40.46
BATALLA, LILITTE	ACCOUNTANT		8	34.70
BEESON, JULIE	CAMPUS SUPERVISOR	\$ 19.14	€9	19.74
BLOOMQUIST, THOMAS	ASSISTANT PRINCIPAL	\$ 69.93	4	75.31
BOLING, JEAN MARIE	ADMINISTRATIVE SECRETARY	\$ 37,05	\$	36.39
BOSS, VICTORIA	LIBRARY TECHNICIAN	\$ 25.68	8	25.23

Six n and Associates

M. ADATE REIMBURSEMENT SERVICES

Name	Title	07-08		00-80	
DURHAM, ELLEN	ADMINISTRATIVE ASSISTANT	\$	54.49	€	53.51
FLANAGAN, MELODY	ATTENDANCE CLERK	СЭ	22.72	€9	22.31
FORNELLI, LINDA	NURSE	69	32.95	€9	47.56
FREEMAN, WALTER	ASSISTANT SUPERINTENDENT, BUSINESS SERVICES			€9	117.07
GARCIA, ALICE	ADMINISTRATIVE SECRETARY	8	27.66	€>	27.16
GEARING, HEATHER	ADMINISTRATIVE ASSISTANT	\$	27.00	\$	26.52
GEARING, LINDA	ACCOUNTING TECHNICIAN	₩.	28.33	€9	27.83
GIORDANI, MARJORIE	ASSISTANT PRINCIPAL			₩	67.98
GLENN, SUSAN	ADMINISTRATIVE SECRETARY-RETIRED 5/31/07	RETIRED		RETIRED	
GOELTZ, KATHY	PSYCHOLOGIST	è	52.20	69	26.22
GUNZELMAN, CATHY	OFFICE ASSISTANT-SPLIT ASSIGNMENT 08/09	€9	21.09	12.91/20.72	
HAINES DECHAIR, LUCY	DIRECTOR, CURRICULUM/INSTRUCTION	\$	75.36	€	81.16
HANCOCK, CATINA	PRINCIPAL	\$	65.93	\$	73.07
HANSEN, JUDITH	ADMINISTRATIVE ASSISTANT	8	27.66	€	27.16
HANSEN, ROSE MARIE	ATTENDENCE CLERK	. (5)	22.72	↔	22.31
JONES HARDEN, LESLIE	PRINCIPAL			69	75.50
HARPER, DONNA	DIRECTOR, PURCHASING & STRS	€9	64.58	\$	63.42
HARTMAN, JANE	COORDINATOR OF SPECIAL PROGRAMS08/09	€	62.78	\$	64.37
HETRICK, LINDY	ADMINISTRATIVE ASSISTANT	\$	29.04	\$	29.96

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Six nand Associates M.--IDATE REIMBURSEMENT SERVICES

Name	Title	07.09	90 90	
HOLLEY, NORMAN /KEITH	COORDINATOR, ALT ED/PRINCIPAL	\$ 73.61	€	83.24
HOWARD, TINA IRENE	ASSISTANT PRINCIPAL-SPLIT 07/08/PRINCIPAL 08/09	\$ 63.10	\$	73.53
HUESING, KIMBERLY	PRINCIPAL		₩	75.50
JENNINGS, DIANE	ADMINISTRATIVE ASSISTANT	\$ 29.78	\$	29.25
JIMENO, ALICE	ADMINISTRATIVE SECRETARY	\$ 30.50	\$ (29.96
KALK, DAVE	ASSISTANT PRINCIPAL	\$ 58.15	\$	64.41
KOTZEBUE, DIANA	HEALTH TECHNICIAN		₩	21.79
KRAMER, BRUCE	DIRECTOR		₩.	84.94
KRYZAK, JENNIFER	HEALTH TECHNICIAN	\$ 24.46	69	24.03
KUHN, MARY	ADMINISTARTIVE SECRETARY-CONFIDENTIAL	\$ 33.88	89	33.27
LANE, KIM	HEALTH TECHNICIAN	\$ 28.32	€	27.82
LARSON, JENNIFER	HEALTH TECHNICIAN	\$ 28.32	€9	27.82
LARSON, LESLIE	HEALTH TECHNICIAN	\$ 24.46	€9	24.03
LEWIS, RICK	DIRECTOR, INFORMATION SYSTEMS	\$ 72.65	€	71.35
LORD IV, WILLIS (BILL)	ASSISTANT PRINCIPAL	\$ 66.60	\$	71.73
LUND, CHAD	ASSISTANT PRINCIPAL			62.63
LUTZ, CINDY	HEALTH TECHNICIAN	\$ 24.46	69	24.03
MADDOX, SHEILA	PRINCIPAL-RETIRED 6/30/07		RETIRED	
MARTINEZ, PAUL	MAINTENANCE WORKER	\$ 38.93	\$	40.14

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Six? and Associates MACADATE REIMBURSEMENT SERVICES

Name	Title				
McCORMAC, KATHRYN	LEAD ACCOUNTANT	\$	41.30	8 0-80	42 59
McCORMICK, LAURA JEAN	OFFICE ASSISTANT	€	24.38		23.94
McKEE, CAROL	COUNSELORRETIRED-SPECIAL ASSIGNMENT BY STIPEND			TIPEND	
MERCHANT, SHARAN	IS SPECIALIST	69	38.93	€	38.23
MILLIKIN, CAROLYN	PRINCIPAL (VALLEY MIDDLE)	€	73.61		79.28
MIRANDA, DOLORES	ATTENDANCE CLERK			69	22.31
MONDERINE, ROSEMARY	SENIOR BUYER	€	38.00	8	37.32
MORALES, JULIO CESAR	ASSISTANT PRINCIPAL	€	58.15	€	71.01
NAVARRO, NANCY	DIRECTOR, FISCAL SERVICES	€	80.72	\$	79.28
NORTON, TORRIE	ASSISTANT SUPERINTENDENT- PERSONNEL	€9	90.99	\$	111.93
O'CONNELL, SUZANNE	ASSISTANT SUPERINTENDENT- INSTRUCTIONAL	€	90.99	. ·	111 93
OGAN, LAURA	ATTENDENCE CLERK	€9	27.72		23.43
OHLIN, EVANGELINE (VANGIE)	ADMINISTRATIVE SECRETARY	· 69	23.80		CT.C. 7
PARKER, RACHEL	COUNSELOR	₩			67.03
PFRANG, SHARON	OFFICE ASSISTANT-LEFT DISTRICT 6/30/07				
PIERCE, ROBERT	TEACHER	€9	59 75		67.84
PINNER, ROBIN	ADMINISTRATIVE ASSISTANT	€9			10.10
PRICE, JULIE	OFFICE ASSISTANT	69			20.72
PULASKI, LINDA	ATTENDANCE CLERK	₩			25.72
					50.0

Cbad_PHR-08-09

California Department of Education (CDE) - School Fiscal Services Division

Restricted Indirect Cost Rates for K-12 Local Educational Agencies (LEAs) - Five Year Listing

approved based on standardized account code structure expenditure data

Address questions to sacsinfo@cde.ca.gov, or call 916-322-1770.

* Revised April 8, 2008

** C = Co D = Dis			CA= Common Administration		APPF	ROVEDF	ATES	
D - DIS	Strict		J = Joint Powers Agency	For	ise with state a	nd federal prog	rams, as allowa	ble, in:
				2004-05	2005-06	2006-07	2007-08	2008-09
County Code	LEA Code	Type**	LEA Name	(based on 2002-03 expenditure data)	(based on 2003-04 expenditure data)	(based on 2004-05 expenditure data)	(based on 2005-06 expanditure data)	(based on 2006-07 expenditure data)
37	10371	С	San Diego County Superintendent	9.84%	8.54%	8.22%	10.27%	9.76%
37	67967	D	Alpine Union Elementary	3.50%	3.16%	2.99%	3.30%	3.27%
37	67975	D	Bonsall Union Elementary	4.54%	4.41%	4.71%	4.05%	3.67%
37	67983	D	Borrego Springs Unified	6.07%	8.52%	7.95%	5.36%	7.72%
37	67991	D	Cajon Valley Union Elementary	5.55%	7.46%	7.28%	5.98%	5.13%
37	68007	D	Cardiff Elementary	3.96%	4.44%	3.82%	3.67%	3.83%
37	68023	D	Chula Vista Élementary	5.36%	4.76%	3.83%	3.54%	3.33%
37	68031	D	Coronado Unified	8.08%	6.29%	6.41%	3.97%	4.85%
37	68049	D	Dehesa Elementary	7.45%	5.62%	5.92%	1.72%	3.86%
37	68056	D	Del Mar Union Elementary	5.42%	6.00%	2.98%	2.07%	4.80%
37	68080	D	Encinitas Union Elementary	6.33%	5.04%	5.22%	5.19%	4.11%
37	68098	D	Escondido Union Elementary	5.75%	4.97%	4.21%	4.80%	5.30%
37	68106	D	Escondido Union High	10.22%	8.07%	7.20%	8.03%	10.22%
37	68114	D	Fallbrook Union Elementary	6.11%	6.69%	5.76%	5.01%	8.03%
37	68122	D	Fallbrook Union High	11.10%	10.32%	7.90%	8.00%	8.99%
37	68130	D	Grossmont Union High	4.68%	5.70%	5.03%	3.19%	3.38%
37	68155	D	Jamul-Dulzura Union Elementary	1.28%	4.56%	5.43%	2.00%	3.08%
37	68163	D	Julian Union Elementary	9.26%	6.16%	1.61%	2.70%	4.58%
37	68171	D	Julian Union High	4.37%	5.35%	11.14%	7.97%	4.09%
37	68189	D	Lakeside Union Elementary	8.91%	7.63%	6.49%	6.84%	8.45%
37	68197	D	La Mesa-Spring Valley Elementary	3.14%	3.64%	4.17%	2.92%	3.62%
37	68205	D.	Lemon Grove Elementary	11.53%	10.06%	9.47%	8.06%	6.96%
37	68213	D	Mountain Empire Unified	6,20%	5.68%	6.57%	4.39%	3.84%
37	68221	D	National Elementary	6.18%	5.85%	5.94%	6.41%	6.07%
37	68296	D	Poway Unified	5,17%	5.19%	5.55%	4.95%	4.23%
37	68304	D	Ramona City Unified	6.62%	7.67%	6.74%	6.46%	6.52%
37	68312	D	Rancho Santa Fe Elementary	8.29%	11.03%	9.99%	9.41%	8.82%
37	68338	D	San Diego Unified	3.58%	5.83%	3.67%	4.64%	5.75%
37	68346	D	San Dieguito Union High	6.54%	7.45%	8.12%	6.12%	4.22%
37	68353	D	San Pasqual Union Elementary	5.01%	5.82%	0.32%	0.29%	3.51%
37	68361		Santee Elementary	5.14%	7.06%	6.98%	6.46%	7.44%
37	68379		San Ysidro Elementary	4.89%	5.58%	5.94%	4.31%	7.09%
37	68387	D	Solana Beach Elementary	8.15%	11.18%	9.01%	7.22%	7.30%
37	68395	D	South Bay Union Elementary	6.11%	6.15%	6.90%	6.13%	4.65%
37	68403	D	Spencer Valley Elementary	15.10%	15.98%	12.57%	2.01%	1.63%
37	68411	D	Sweetwater Union High	4.99%	4.63%	4.75%	5.37%	4.96%
37	68437	D	Vallecitos Elementary	8.49%	3.65%	5.56%	6.04%	8.07%
37	68452	D	Vista Unified	4.57%	4.61%	3.61%	3.99%	4.65%
37	73551		Carlsbad Unified	5.73%	5.83%	6.48%	4.84%	6.18%
37	73569		Oceanside Unified	4.53%	4.44%	4.32%	3.21%	2.84%
37	73791		San Marcos Unified	4.07%	3.16%	3.74%	2 700/	3.61%
37	75416		Warner Unified	6.17%	7.42%	10.93%	7.73%	8.34%
37	75614	D	Valley Center-Pauma Unified	5,89%	7.98%	6.32%	5.82%	5.96%

Fiscal Year

2007-2008

Six fen and Associates **Mandate Reimbursement Services**

KEITH B. PETERSEN, MPA, JD, President E-Mail: Kbpsixten@aol.com

San Diego

5252 Balboa Avenue, Suite 900 San Diego, CA 92117 Telephone: (858) 514-8605 Fax: (858) 514-8645

Claim File Copy

Sacramento

3841 North Freeway Blvd., Suite 170 Sacramento, CA 95834 Telephone: (916) 565-6104

Fax: (916) 564-6103

February 13, 2009

CERTIFIED MAIL #7006 3450 0000 3941 8925

Ms. Virginia Brummels, Section Manager Local Reimbursement Section Division of Accounting and Reporting Office of the State Controller P.O. Box 942850 Sacramento, CA 94250

RE:

Annual Reimbursement Claims

Carlsbad Unified School District S37030

Dear Ms. Brummels:

Enclosed please find the original claims and extra copies of the FAM-27 for Bonita Unified School District's reimbursement claims listed below:

498/83 1117/89 161/93 98/94 975/95 589/97	The Stull Act Consolidation of LEAN and MCR Intradistrict Attendance Caregiver Affidavits Physical Performance Tests Criminal Background Checks II	2007-2008 2007-2008 2007-2008 2007-2008 2007-2008 2007-2008
736/97	Comprehensive School Safety Plans	2007-2008

If you have any questions regarding these claims, please contact me at (858) 514-8605.

Sincerely,

Larry Hendee, Vice-President

Brannell

State Controller's Office School Mandated Cost Manual For State Controller Use Only **CLAIM FOR PAYMENT** Program (19) Program Number 00260 Pursuant to Government Code Section 17561 (20) Date Filed THE STULL ACT (21) LRS Input (01) Claimant Identification Number: S37030 Reimbursement Claim Data (02) Claimant Name (22) SA-1, (03)(A)(f) 340 Carlsbad Unified School District County of Location (23) SA-1, (03)(B)(f) San Diego Street Address (24) SA-1, (03)(A)(1)(a)(f) 37,021 6225 El Camino Real City State Zip Code (25) SA-1, (03)(A)(1)(b)(f) 51,546 Carlsbad CA ype of Claim **Estimated Claim** Reimbursement Claim (26) SA-1, (03)(A)(2)(a)(f) 17,635 (03) Estimated (09) Reimbursement Χ (27) SA-1, (03)(A)(2)(b)(f) 23,999 (04) Combined (10) Combined (28) SA-1, (03)(B)(1)(a)(f) (05) Amended (11) Amended (29) SA-1, (03)(B)(1)(b)(f) (06)(12) (30) SA-1, (03)(B)(1)(c)(f) Fiscal Year of cost 2007-2008 (07) (13)**Total Claimed Amount** (31) SA-1, (03)(B)(1)(d)(f) 136,502 (14)(32) SA-1, (03)(B)(1)(e)(f) Less: 10% Late Penalty (15)(33) SA-1, (05) Less: Prior Claim Payment Received (16)**Net Claimed Amount** (34) SA-1, (06) 6,302 \$ 136,502 (08)(17)(35) SA-1, (08) **Due from State** 136,502 (18)(36) SA-1, (09) Due to State (37) CERTIFICATION OF CLAIM In accordance with the provisions of Government Code Section 17561; I certify that I am the officer authorized by the school district to file mandated cost claims with the State of California for this program, and certify under penalty of perjury that I have not violated any of the provisions of Government Code Sections 1090 to 1098, inclusive. I further certify that there was no application other than from the claimant, nor any grant or payment received, for reimbursement of costs claimed herein, and such costs are for a new program or increased level of services of an existing program. All offsetting savings and reimbursements set forth in the Parameters and Guidelines are identified, and all costs claimed are supported by source documentation currently maintained by the claimant. The amounts for this Estimated Claim and/or Reimbursement Claim are hereby claimed from the State for payment of estimated and/or actual costs set forth on the attached statements. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. Signature of Authorized Officer (USE BLUE INK) Date 2/10/09 Walter Freeman Assistant Superintendent, Business Services Type or Print Name (38) Name of Contact Person for Claim Telephone Number: (858) 514-8605 SixTen and Associates E-mail Address: kbpsixten@aol.com

Form FAM-27 (New 12/05)

					School	Mand	lated Cost Mar
Program			FED COSTS	•		1	FORM
260			TULL ACT SUMMARY	•			FORM SA-1
)1) ()ınt:		CLAIN	(02) Type of Claim			丄	
arlsbad Unified School District				_	· 		Fiscal Year
			Reimburseme	ent X			2007-2008
			Estimated				_
irect Costs			Objec	t Accounts			
3)	(a)	(b)	(c)	(d)	(e)	\top	(f)
Reimbursable	Salaries	Materials	Contract	Fixed	Travel		(4)
Components	and Benefits	and Supplies	Services	Assets	and		Total
Certificated Instructional Employees (CIE)	 		evaluated per (03] 3)(A)(1) and (03)(A)(Training (2)	+	
Evaluate and assess performance	· · · · · · · · · · · · · · · · · · ·			198/83; Reimburse			34
a. Review employee's techniques and	\$ 37,020.57			T	Τ'.	ns ry ⊤—	1997-98
b. Evaluation to include assessment of			\$ - \$ -	\$ -	\$ -	\$	37,020.5
techniques and strategies Evaluate and assess CIE who teach certain subjects	ļ	<u> </u>		\$ - l/99; Reimburseme	* -	\$	51,546.3
a. Review STAR results	\$ 17,635.01		\$.	\$.	Γ.	Τ.	
ssessment based on STAR results	\$ 23,998.59		\$.	\$ -	\$ -	\$	17,635.01
CIE and NIE Employees	Claim Statistics:	Number of CIE's	and NIE's evaluat	· .		 \$ 	23,998.59
Evaluate and assess CIE and NIE employees				98/83; Reimbursen	nont posted by the		100= 00
a. Evaluating and assessing CIE according to certain criteria	\$	\$ -	\$	\$	s .	1.	1997-98
b. Reducing evaluation to writing	\$ -	\$ -	\$ -	\$	\$	\$	<u> </u>
c. Transmitting evaluation to CIE	\$ -	\$ -	\$.	\$	\$ -	\$	
d. Attaching response to personnel file	\$ -	\$ -	\$ -	\$ -1	\$ -	\$	<u> </u>
e. Discussing evaluation with CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$	
) Total Direct Costs	\$ 130,200.52	\$ -	\$ -	\$ -	\$ -	\$	130,200.52
irect Costs		<u></u> - <u>-</u>	<u>-</u>				
Indirect Cost Rate				[From J-380 or J-580]			A 940/
Total Indirect Costs				[Line (05) x line (04)(a)]	· · · · · · · · · · · · · · · · · · ·	\$	6,301.71
Total Direct and Indirect Costs				[Line (04)(f) + line (06)]			136,502.23
t Reduction						 -	100,002,20
setting Savings						\$	
Less: Other Reimbursements						\$	
Total Claimed Amount			196 [Line (07) - {Line (08) + Line (0		\$	136,502.23
12/05			1.86	1 /	//4	-	100,002.20

State Controller's Office						Sci	hooi Mandate	d Cost Manu
Rrogram: 260	COMM		ED COSTS ULL ACT					FORM SA-2
(01) Claimant	30///	ONLIVITACI						<u> </u>
orlsbad Unified School District			(02) Fiscal	Year				
(03) Reimbursable Components								2007-2008
(00) Reimbursable Components		dentify the con	nponent being	claimed.				
A. CIE	Review employee's techniques and strategies		Evaluation to in of techniques a	clude assessment nd strategies				,
	Review STR Results		Assessment ba	sed on STR result	s 			
B. CIE & NIE	Evaluating and assessing CIE according to certain criteria	' <u></u>	Reducing evalu	ation to writing		Transmitting ev	raluation to CIE	
	Attaching response to personnel file		Discussing eval	uation with CIE				
(04) Description of Expenses						Object Accour	ıts	
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
	Names, Job	Hourly	Hours	Salaries	Materials			} '
	unctions Performed, ion of Expenses	Rate or Unit Cost	Worked or Quantity	and Benefits	and Supplies	Contract Services	Fixed Assets	Travel and Training
Preparing to evaluate and assess the per	dormance of a CIF							
Administrators	Various	\$69.32	191.7	\$ 13,288.64		~ ,		
Discussing the CIE's goals and objective								
Administrators	Various	\$69.32	180.6	\$ 12,519.19				
Pre-observation conference and discussi Administrators	on with CIE Various	\$69.32	138.1	\$ 9,573.09				
Attendance at training required to perform	n evaluations							
Armstrong, Theresa	Principal	\$60.76	1.5	\$ 91.14				
Bloomquist, Tom	Assistant Principal	\$69.93	3.5	\$ 244.76]			
Giordani, Marjorie Hancock, Catina	Assistant Principal Principal	\$63.55	3.5				i i	
Howard, Tina	Assistant Principal	\$65.93 \$63.55	1.5 1.5		}		-	
Huesing, Kimberly Ann	Principal	\$71.89	1.5					
Kalk, Dave	Assistant Principal	\$58.15	1.5					
Lord, Bill	Assistant Principal	\$66.60	3.5					
Lund, Chad	Assistant Principal	\$63.55	1.5					
Morales, Julio Cesar	Assistant Principal	\$58.15	1.5		i			<u> </u>
Sester, Phyllis Sims, Cynthia	Admin Assistant Admin Assistant	\$27.66	2.0	\$ 55.32		1		ĺ
Smith, Emily	Admin Assistant	\$27.66 \$26.34	2.0 2.0	\$ 55.32 \$ 52.68				
roining stoff that will be a set on the U		7200	2.0	¥ 32.00				.
raining staff that will be performing the er Vodicka, Devin	Valuations Director	\$75.36	1.5	\$ 113.04				
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O) Total X	Subtotal	Page 1	of 1	\$ 37,020.57	\$ -	\$ -	\$.	\$ -
w 12/05					<u>.</u>			1

Controller's Office	MANDAT	ED COSTS			Sc	hool Mandate	d Cost Manu
Program 250		ULL ACT) TAU				FORM SA-2
(01) Claimant	OILLITIACT	(02) Fiscal					
rlsbad Unified School District		(UZ) FISCAI	rear				2007-2008
(03) Reimbursable Components: Check only one box per form	to identify the cor	nponent being	claimed				
A. CIE Review employee's techniques and strategies	X		iclude assessment	•			
Review STR Results	. 🗀		sed on STR result	s		,	
B. CIE & NIE Evaluating and assessing CIE accord to certain criteria	ding	Reducing evalu	ation to writing		Transmitting e	valuation to CIE	
Attaching response to personnel file		Discussing eval	uation with CIE				
(04) Description of Expenses			T		Object Accou	nte	
(a)	(b)	(c)	· (d)	(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed, and Description of Expenses	Hourly Rate or	Hours Worked or	Salaries and	Materials and	Contract Services	Fixed	Travel and
	Unit Cost	Quantity	Benefits	Supplies	Services	Assets	Training
Classroom observation to evaluate and assess performance Administrators Various	\$69.32	270.4	\$ 18,744.13				
Post-observation conference and discussion with CIE Administrators Various	\$69.32	189.0					
Discussing evaluation and write-up with CIE Administrators Various	\$69.32		·				
Reducing evaluation to writing, forward to personnel file	ψυσ.υ2.	204.2	\$ 14,155.14				
Administrators Various	\$69.32	80.0	\$ 5,545.60				
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, Total 🗓 Subtotal 🗀	Page 1	of 1 \$	51,546.35 \$		3 - 5	\$ - \$	
12/05				[- <u>- 1</u> 3	- 1

State Controller's Office						Sch	nool Mandate	d Cost Manua
TRIOGRAM COME		ED COSTS JLL ACT	DETAII			· · · · · · · · · · · · · · · · · · ·		FORM SA-2
(01) Claimant	- CALITAGA	(02) Fiscal Y						
sbad Unified School District		(UZ) FISCAI- I	rear					2007-2008
(03) Reimbursable Components: Check only one box per form to i	identify the con	nponent being	claimed.					
A. CIE Review employee's techniques and strategies		Evaluation to in-			•			
X Review STR Results		Assessment ba	sed on STR r	results				
B. CIE & NIE Evaluating and assessing CIE according to certain criteria	· 🗀	Reducing evaluation	ation to writin	ng		Transmitting ev	valuation to CIE	
Attaching response to personnel file		Discussing eval	uation with C	ΊE				-
(04) Description of Expenses					C	bject Accour	nts	
(a)	(b)	(c)	(d)		(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed, and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salarie and Benefit		Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
		-						
Preparing to evaluate and assess the performance of a CIE Administrators Various	\$69.32	90.4	\$ 6,26	66.53	•			
Discussing the CIE's goals and objectives Administrators Various	\$69.32	92.0	\$ 6,37	77.44				
Pre-observation conference and discussion with CIE Administrators Various	\$69.32	72.0	\$ 4,99	91.04	٠			
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Total X Subtotal	Page	1 of 1	\$ 17,635	5.01	\$	\$ -	\$ -	\$ -
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State Controller's Office								Sc	hool Mandate	d Cost Manua
Program				MANDATE						
260			COM	THE STU						FORM SA-2
(01) Claimant			COMP	PONENT/ACTI			····			1
risbad Unified School D	letrict				(02) Fiscal	Year	,			
,										2007-2008
(03) Reimbursable Compo	nents:	Check only one	box per form to i	dentify the com	ponent being	claimed.		- : 		
A. CIE		Review employee's strategies	techniques and		Evaluation to in of techniques a	nclude assessme nd strategies	ent			
		Review STR Result	ts	X	Assessment ba	ised on STR res	ults			
B. CIE & NIE		Evaluating and assito certain criteria	essing CIE according		Reducing evalu	ration to writing		Transmitting e	valuation to CIE	
		Attaching response	to personnel file		Discussing eva	luation with CIE				
(04) Description of Expens								Object Accou	nts	
	. (a)		(b)	(c)	(d)	(e)	(f)	(g)	(h)
Classifical	ions, Fu	Names, Job nctions Performed, on of Expenses		Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
Classroom observation to evaluat	 			·						
Administrators		Various		\$69.32	121.5	\$ 8,422.3	38			
Post-observation conference and Administrators		Various		\$69.32	110.3	\$ 7,646.0	00			
Discussing evaluation and write-u Administrators	p with Ci	E Various		\$69.32	114.4	\$ 7,930.2	21			•
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Total X		Subtotal 🗀		Page 1	of 1	\$ 23,998.59	\$ -	\$ -	\$ - :	\$ -
w 12/05							1			

Carlsbad Unifie. ol District 498/83 THE STULL ACT 2007-2008 Sort by Name

tunnonmo	Baviow STAD rough	Devices OTAN Jesuits	Devices Of An Lesuits	neview of AR fesulis	Assessment based on STAR results	Assessment based on STAR results	Assessment based on STAR results	Review employee's techniques and strate	Review employee's techniques and strate	Review employee's techniques and	Evaluation to include accessment of took	Evaluation to include assessing of lectil	L'valuation to include assessment of tech	Evaluation to include assessment of techi	Evaluation to include assessment of tech	-	Review employee's techniques and strate		neview employee's techniques and strate	neview employee's techniques and strate	-	Review employee's techniques and strate	Heview employee's techniques and strate		. Heview employee's techniques and strate		Review employee's techniques and strate	t t	Heview employee's techniques and strate	Review employee's techniques and strate	ייייי אינייייין איניייין אינייייין אינייייין אינייייין	Review employee's techniques and strate	Review employee's techniques and strate		Review employee's techniques and strate		Review employee's techniques and strate	Review employee's fechniques and etrate	ייייי לייייי איייין אייייי אייייין איייייין אייייייין איייייייי
Activity	\$6,266.53 Preparing to evaluate and assess the performance of a CIF	\$6,377.44 Discussing the CIE's goals and objectives	\$4,991.04 Pre-observation conference and discussion with CIE	\$8,422.38 Classroom observation to evaluate and access notermone.	\$7.846.00 Post-observation conference and discussion with Oil	too i oo observation confedence and discussion With CIE	Set Discussing evaluation and write-up with CIE	\$13,266.04 Preparing to evaluate and assess the performance of a CIE	\$12,519.19 Discussing the CIE's goals and objectives	\$9,573.09 Pre-observation conference and discussion with CIE	\$18,744.13 Classroom observation to evaluate and assess performance	\$13,101.48 Post-observation conference and discussion with CIF	\$14.155.14 Discussing evaluation and write-up with CIE	\$5.545.60 Reducing evaluation to writing forward to proceed title	so receiving evaluation to writing, forward to personnel life.	\$31.14 Attendance at training required to perform evaluations	14	\$139.86 Attendance at training required to perform evaluations	\$104.90 Attendance at training required to negome evaluations	76	\$127.10 Attendance at training regulited to perform eventualises	\$95.33 Attendance at training required to bellom evaluations	43	\$98 90 Attendance of training roquired to morform and the sections	oo maaraa aa manning raquinga to bellomi evaluations 90	33 Attandance at training rowning to made we	455.53 Americance at italiiling required to perform evaluations 495.33	\$107.84 Attendance at training required to notions and untilined	or a montant of at a maining required to perform evaluations.	\$87.23 Attendance at training required to perform evaluations		\$133.20 Attendance at training required to perform evaluations	\$99.90 Attendance at training required to perform evaluations	01	\$95.33 Attendance at training required to perform evaluations ৫০চ ০০	0.0 0.0 Attended to 1.0 Attended to 1.0 Attended to 1.0 Attended to 1.0 Attended to 1.0 Attended to 1.0 Attended to	♦०7.23 Autendarice at training required to perform evaluations \$87.23	\$55.32 Attendance at training required to perform evaluations	75
Salary															ě.								<i>\G</i>	#15. #0\$	06.898					•	\$87.23	\$133.	4999	\$233.10 6 01.00	\$95.33 \$05.33	490.0	\$87.23	\$55.6	\$55.32
PHR	\$69.32	\$69.32	\$69.32	\$69.32	\$69.32	\$69.30	460 33	003.00	\$69.32	\$69.32	\$69.32	\$69.32	\$69.32	\$69.32		\$60.76		\$69.93	\$69.93		\$63.55	\$63.55		\$65.93		\$63.55	200	\$71.89		\$58.15		\$66.60	\$66.60	400 55	\$63.55	459 45	÷20.	\$27,66	
Title	Various	Various	Various	Various	Various	Various	Various	Verious	various	Various	Various	Various	Various	Varions		Principal		Assistant Principal	Assistant Principal		Assistant Principal	Assistant Principal		Principal	-	Assistant Principal		Principal	tai .	Assistant Principal		Assistant Principal	Assistant Pillicipal	Assistant Dringing	Assistant Fillicipal	Assistant Principal		Admin Assistant	
Employee Name	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators Total	Armstrong, Theresa	Armstrong, Theresa Total	Bloomquist, Tom	Bloomquist, Tom	Bloomquist, Tom Total	Giordani, Marjorie	Giordani, Marjorie	Giordani, Marjorie Total	Hancock, Catina	Hancock, Catina Total	Howard, Tina	Howard, Tina Total	Huesing, Kimberly Ann	Huesing, Kimberly Ann Total	Kaik, Dave	I and Dill	Lord, Bill Lord, Bill	Lord, Bill Total	Lund, Chad	Lund, Chad Total	Morales, Julio Cesar	Morales, Julio Cesar Total	Sester, Phyllis Sester, Phyllis Total	ector, rayino rotat
Hours	90.40	92.00	72.00	121.50	110.30	114.40	191.70	180.60	138 10	130.10	2/0.40	189.00	204.20	80.00	1,854.60	1.50	1.50	2.00	1.50	3.50	2.00	1.50	3.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	3 6	1.50	-		_	1.50	_	2.00 2.00	
Date	0.7	80-70	90-70	07-08	07-08	02-08	07-08	07-08	07-08	200	07-08	20-70	07-08	07-08		07-08	•	₈ ρ ‡9	4 08		02-08	07-08		07-08		07-08		07-08		07-08	80-70	07-08	!	07-08		07-08		07-08	

Carlsbad Unifiec ol District 498/83 THE STULL ACT 2007-2008 Sort by Name

Hours	Employee Name	Title	HH	Salarv	Activity	
2.00	Sims, Cynthia Sims, Cynthia Total	Admin Assistant	\$27.66	\$55.32	\$55.32 Attendance at training required to perform evaluations	Review employee's techniques and strate
2.00	2.00 Smith, Emily 2.00 Smith, Emily Total	Admin Assistant	\$26.34	\$52.68 \$52.68	\$52.68 Attendance at training required to perform evaluations \$52.68 Attendance	Review employee's techniques and strate
1.50	Vodicka, Devin Vodicka, Devin Total	Director	\$75.36	\$113.04	\$113.04 Training staff that will be performing the evaluations	Review employee's techniques and strate
1,883.1(,883.10 Grand Total	,		\$130,200.52		

Combined Schedule 1 Carlsbad Unified School District Stull Act 498/83 Termporary, Probationary, and Permanent Evaluations Fiscal Year: 2007-2008 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Principals and Vice Principals" on Permanent, Probationary, & Temporary evaluations.

Source: Combined Schedule 2.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
Hours Worked (Code 11)	90.4	191.7
Hours Worked (Code 12)	92.0	180.6
Hours Worked (Code 13)	72.0	138.1
Hours Worked (Code 14)	121.5	270.4
Hours Worked (Code 15)	110.3	189.0
Hours Worked (Code 16)	114.4	204.2
Hours Worked (Code 17)		80.0

Conclusion: Findings will go forward to the SA-2.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives

Combined Schedule 2 Carlsbad Unified School District Stull Act 498/83 Termporary, Probationary, and Permanent Evaluations Fiscal Year: 2007-2008 Time Summary

Purpose: To summarize Total Hours Worked by Various Administrators evaluating teachers.

Source: Schedule 1A, 1B and 1C.

Findings:

Various Administrators		Evaluation Criteria A	Evaluation Criteria B & C
Code 11			
Temporary		11.3	22.5
Probationary		24.8	56.7
Permanent		54.4	112.5
		90.4	191.7
Code 12			
Temporary		7.3	15.0
Probationary		24.8	53.1
Permanent		60.0	112.5
Code 13		92.0	180.6
Temporary		F 0	40.5
Probationary		5.8 15.6	12.5 31.9
Permanent	4	50.6	93.8
		72.0	138.1
Code 14		12.0	100.1
Temporary	,	8.8	23.8
Probationary		28.3	77.9
Permanent		84.4	168.8
		121.5	270.4
Code 15			•
Temporary		7.0	17.5
Probationary		28.3	49.6
Permanent		75.0	121.9
Code 40		110.3	189.0
Code 16		7.5	
Temporary Probationary		7.5 31.9	16.3
Permanent		75.0	56.7 131.3
romanon		114.4	204.2
Code 17		1 14.4	204.2
Temporary			6.0
Probationary			17.7
Permanent			56.3
			80.0

Conclusion: Findings go to Combined Schedule 1.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

. Code 16- Final conference with instructor

Code 17- District reporting

Print Date: 1/16/2009 CBAD SA 07-08 Array

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives
- (D) Suitable learning environment

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SixTen and Associates smp 12/28/07

Schedule 1A Carlsbad Unified School District 498/83 Stull Act

Fiscal Year: 2007-2008 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Principals and Vice Principals".

Source: Schedule 1AA Temporary and SA 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B&C
# of reimbursable K-12 evaluations	30	30
Avg. time p/ evaluation preparation	22.5	45.0
Total Time (in minutes)	675	1350
Per Hour	60	60
Hours Worked (Code 11)	11.3	22.5
# of reimbursable K-12 evaluations	30	30
Avg. time p/ goals & obj. conf. with instructor	14.5	30.0
Total Time (in minutes)	435	900
Per Hour	60	60
Hours Worked (Code 12)	7.3	15.0
# of reimbursable K-12 evaluations	30	. 30
Avg. time p/ pre-observation conf. with instructor	11.5	25.0
Total Time (in minutes)	345	750
Per Hour	60	60
Hours Worked (Code 13)	5.8	12.5
# of reimbursable K-12 evaluations	30	30
Avg. time p/ classroom observation of instructor	17.5	47.5
Total Time (in minutes)	525	1425
Per Hour	60	. 60
Hours Worked (Code 14)	8.8	23.8
# of reimbursable K-12 evaluations	30	30
Avg. time p/ post-observation conf. with instructor	14.0	35.0
Total Time (in minutes)	420	1050
Per Hour	60	60
Hours Worked (Code 15)	7.0	17.5
# of reimbursable K-12 evaluations	30	30
Avg. time p/ final conf. with instructor	15.0	32.5
Total Time (in minutes)	450	975
Per Hour	60	60
Hours Worked (Code 16)	7.5	16.3
# of reimbursable K-12 evaluations	·	30
Avg. time p/ district reporting		12.0
Total Time (in minutes)		360
Per Hour		60
Hours Worked (Code 17)		6.0

Conclusion: Findings will go forward to Combined Schedule 2.

*Activity Codes Code 11- Preparing for the evaluation Code 12- Goals and objectives conference with instructor Code 13- Pre-observation conference with instructor Code 14- Classroom observation of instructor Code 15- Post-observation conference with instructor Code 16- Final conference with instructor Code 17- District reporting

Evaluation Criteria

nuation	Criteria
(A)	District standards and test results
(B)	Instructional techniques/strategies
(C)	Adherence to curricular objectives

Schedule 1C Carlsbad Unified School District 498/83 Stull Act - Temporary Teacher Evaluations Fiscal Year: 2006-2007 Time Summary

Purpose: To summarize total hours spent by administrative staff on "temporary" teacher evaluations. Source: Schedule 2C and 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
# of reimbursable K-12 evaluations	44	. 44
Avg. time p/ evaluation preparation	25	50
Total Time (in minutes)	1100	2200
Per Hour	60	
Hours Worked (Code 11)	18.3	
# of reimbursable K-12 evaluations	. 44	44
Avg. time p/ goals & obj. conf. with instructor	14	35
Total Time (in minutes)	616	
Per Hour		1540
Hours Worked (Code 12)	<u>60</u>	<u>60</u> 25.7
# of reimbursable K-12 evaluations	44	
Avg. time p/ pre-observation conf. with instructor	, 11 8	44
Total Time (in minutes)	352	30
Per Hour		1320
Hours Worked (Code 13)	60	60
(500)	5.9	22.0
# of reimbursable K-12 evaluations	44	44
Avg. time p/ classroom observation of instructor	20	55
Total Time (in minutes)	880	2420
Per Hour	60	60
Hours Worked (Code 14)	14.7	40.3
•	17.7	40.3
# of reimbursable K-12 evaluations	44	. 44
Avg. time p/ post-observation conf. with instructor	13	35
Total Time (in minutes)	572	1540
Per Hour	60	60
Hours Worked (Code 15)	9.5	25.7
		20.1
# of reimbursable K-12 evaluations	44	44
Avg. time p/ final conf. with instructor	15	30
Total Time (in minutes)	660	1320
Per Hour	60	60
Hours Worked (Code 16)	11.0	22.0
# of reimbursable K-12 evaluations	•	
Avg. time p/ district reporting		44
Total Time (in minutes)		15
Per Hour		660
		60
Hours Worked (Code 17)		11.0

Conclusion: Findings will go forward to the Schedule 1.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives
- (D) Suitable learning environment

Schdule 1AA Carlsbad Unified School District 498/83 Stull Act Temporary Fiscal Years 2007-2008 2 year time study

Prupose: To calculate a 2 year rolling average to be used for the 2007-2008 Stull Act.

Source: Schedule 1C from 2006-2007 and Schedule 3 from 2007-2008. (See 06-07 source in 06-07 claim.)

Findings:

Temporary Evaluations

	2006	-2007	2007	-2008	Ave	rage
Activities	Α	B&C	Α	B&C	Α	B&C
0005.44						
CODE 11	25.0	50.0	20.0	40.0	22.5	45.0
CODE 12	14.0	35.0	15.0	25.0	14.5	30.0
CODE 13	8.0	30.0	15.0	20.0	11.5	25.0
CODE 14	20.0	55.0	15.0	40.0	17.5	47.5
CODE 15	13.0	35.0	15.0	35.0	14.0	35.0
CODE 16	15.0	30.0	15.0	35.0	15.0	32.5
2005						32.0
CODE 17	<u> </u>	15.0		9.0		12.0

Conclusion: Findings to go forward to Schedule 1A

Activities

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

(A) District standards and test results

(B) Instructional techniques/strategies

(C) Adherence to curricular objectives

Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2007-2008T Temporary Time Study Schedule 3

Purpose: To calculate time spent by "Various Principals and Vice Principals" on Stull Act. Source: SA 1.7-A Temporary Timesheets.

Findings:

								*	'Activ	*Activity Codes	des						
_			-	_			12				13		-		14	4	
Schoolsite	Staff	4	B	ပ		4	m	ပ	Ω	4	В	ပ	٥	٧	В	ပ	□
Aviara Oaks Flementary	Kimberly Ann Huesing	55	25	25	25	55	30	30	30	55	30	30	30	**180	30	30	30
Aviara Oaks Middle			20	20	20	10	10	10	10		10	9	9		15	15	15
Buena Vista	Tina Howard	09	8			09				30	30			**240	**120	**120	**120
Calavera Hills Flementary	—		9			15.	15				5.	2		2	15	15	10
Calavera Hills Middle	Catina Hancock	4	40	40	40	ro.	2	5	5	9	5	5	5	45	45	45	45
Carlshad Valley Academy		15	15			15	15			15				09	90	90	09
Carlshad High School		15				15		-		15				**120			
	Mariorie Giordani	15				15				15				4	ı		
	Tom Bloomanist	10				10				10	-			**240			
	Rich Tubbs	10			-	5	10	10	ည	3	10	10	10	5	15	15	10
	Carol Van Vooren	7				10	19	2	2	2	2	2	2	2	10	10	10
Jellerson	Thorses Armstrond	2 0	10	10	9	10	10	9	9	ည	വ	2	2	10	10	10	10
Nelly Docific Pim	Robert Devich	2			ဓ		-		99	-	-		30				30
Doincetta	Steve Ahle	13	13	13	13	18	18	18	18	20	18	18	18	6	6	6	6
Valley Middle	Julio Cesar Morales					15	15	15	15	12	12	12	12	12	12	12	12
Averages		23	20	22	23	19	14	13	18	16	13	11	14	17	22	22	- 22
Summation of criteria B and C	and C	ļ	4	5	-	 	27	¦ 	;] ! !	23				4	4	
Averages to be used		20	4	40		15	25			15	20		1	15	4	40	•
					H				11				!				

Conclusion: Findings will go forward to Schedule 1AA.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 15- Post-observation conference with instructor Code 14- Classroom observation of instructor

Code 16- Final conference with instructor

Code 17- District reporting

Evaluation Criteria

(A) District standards and test results

(B) Instructional techniques/strategies(C) Adherence to curricular objectives(D) Suitable learning environment

**Times were not used to calculate averages

Schedule 3 Carlsbad Unified School District 498/83 Stull Act

Fiscal Year: 2007-2008T Temporary Time Study

Temporary Time Study

Purpose: To calculate time spent by "Various Principals and Vice Principals" on Stull Act.

Source: SA 1.7-A Temporary Timesheets. Findings:

							*Act	*Activity Codes	odes				
			1	15			_	16			-	17	
Schoolsite	Staff	٧	œ	ပ	٥	٧	മ	ပ	Ω	A	m	ပ	
Aviara Oaks Elementary	Kimberly Ann Huesing	**180	30	30	30	₩180	8	30	30	**180	30	30	8
Aviara Oaks Middle	Carolyn Millikin		9	10	10		10	10	10		2	2	2
Buena Vista	Tina Howard	30	90			**120	99	30	30	**120	**120	**120	**120
Calavera Hills Elementary Leslie Harden	Leslie Harden	5	10	10	2	2	10	10	2		30		
Calavera Hills Middle	Catina Hancock	20	20	20	20	40	4	40	40	10	10	10	10
ਰ	my Keith Holley	40	40	40		20	20	20		15			
Carlsbad High School	Bill Lord	30				30							
	Marjoríe Giordani	30				30							
	Tom Bloomquist	40				20							
Норе	Rich Tubbs	5	10	10	10	10	10	10	9	5	2	22	5
Jefferson	Carol Van Vooren	2	10	5	10	10	10	9	10	2	5	5	22
Kelly	Theresa Armstrong	10	19	10	10	10	10	9	9	5	2	5	5
Pacific Rim	Robert Devich				30				30				
Poinsetta	Steve Ahle	6	6	ი	6					-	-	-	-
Valley	Julio Cesar Morales	12	12	12	12	18	12	12	12				
Averages	i c	19	20	16	15	19	21	18	19	7	11		œ
- Mil	B and C	 	9	36		¦ ¦ 	39		 !	1	6	- 	
Averages to be used		15	35	2		15	35				- 6	-1	
					•				11				

Conclusion: Findings will go forward to Schedule 1AA.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor Code 17- District reporting

Evaluation Criteria

Criteria A - district standards and test results Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives Criteria D - suitable learning environment

**Times were not used to calculate averages

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

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Please report below the av			
rease report below the av	'erade amount of time spe	ent (in minutes) by you	to implement each of
Haran — turneti — 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	and and appears	one (an minutes) by you	in imbiguettietit eactt of
he reimbursable activities	for the mandated program	_	-

the reimbu	irsable activities for the mandated prog	gram.		•		
Carls	pad USD	ADF				
District/C		Department	Locatio	on ·		
Employee	erly Ann Huesina	Princip Exact Position				 -
0-331-(Telephone	2000 12mo/11mo/10mo/hrly Work year length(circle)	Fiscal Year: Circle the years	05-06 for whice	•	07-08 e respon	nding.
Code 11 Pr Code 12 G Code 13 Pr Code 14 Cl Code 15 Pc Code 16 Fi Code 17 Dl		(A) dis ctor (B) ins (C) adi (D) sui	tion Crite trict stand tructiona herence table lead	dards ar I techniq to curricu rning en	ues/stra ular obje vironme	itegies ectives nt
Allocate the	average time spent on each criterion (A-D)	for	Ave	erage Tin	ne in Mir	nutes
each of the	following evaluation steps:		Α	В	С	D
Code 11	Preparing for the evaluation		55	2.5	25	35
Code 12	Goals and objectives conference with ins	structor	55	30	30	36
Code 13	Pre-observation conference with instructor	or	55	30	30	30
Code 14	Classroom observation of instructor		180	30	30	30
Code 15	Post-observation conference with instruct	tor	180	30	30	35
Code 16	Final conference with instructor		180	30	30	30
Code 17	District Reporting		180	30	处	30
EMPLOYEE C	EDTIFICATION The State of Calif					
you have report out on the property of the pro	questions, please contact	estimate which you d correct based on yoposes only. PLEAS	ignature o "certify (or	n this for declare)	m certifie) under pe	es that
'LEASE SUBN	MIT THIS INFORMATION BY	; TO		· · · · · ·	·	 ,

498/83 The Stull Act (K-12)

Please report	below the average amount of time s	pent (in minutes) by you	u to imp	lement	each o	f
District/COE Employee N 33/- (a/ Telephone # Reimbursable A Code 11 Prepa Code 12 Goals Code 13 Pre-o Code 14 Class Code 15 Post-	ame 12mo/11mo/10mo/hriy Work year length(circle) activities Codes: aring for the evaluation and objectives conference with instructor bservation conference with instructor conference with instructor conference with instructor	Department/L Exact Position Fiscal Year: Circle the years of the position (A) distribution (B) instribution (C) adhermals	n Title 05-06 for which cuctional erence table lear	06-07 h you are techniq o curricuming env	07-08 e respon d test re ues/strai	ding. esults tegies ctives	√α
Allocate the ave	erage time spent on each criterion (A-D) for powing evaluation steps:				ne in Min		
	Timing Craidation Steps.		A	В	С	D] .
Code 11	Preparing for the ev al uation			20	20	20	ν
Code 12	Goals and objectives conference with instr	uctor	10	(0	10	[0	
Code 13	Pre-observation conference with instructor	. * «		10.	10	10.	
Code 14	Classroom observation of instructor		,	15	15	15	
Code 15	Post-observation conference with instructor			10	(U	10	
Code 16	Final conference with instructor			10	10	10	_
Code 17	District Reporting			2	7	7	
TADLOVEE OFF							i =
out for state mar- you have reported perjury under the land information." This Employee Signatu	TIFICATION: The State of California requires dates in order for the district to receive reimi actual data or have provided a good faith estaws of the State of California to be true and information is used for cost accounting purpore	oursement. Your sig stimate which you "o correct based on youses only. PLEASI	nature of certify (or our person E USE Bi Date	n this for declare) nal know LUE INK	m certifie	s that	
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Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - TEMPORARY



Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

TINA	LSBAD UNIFIED HOWARD	Department			· · ·	
⊏mpioyei	e Name	Exact Position	on Title	AL		<u> </u>
	ne # 12mo/11mo/10mo/hrly Work year length(circle)	Fiscal Year: Circle the years	05-06	06-07	07-08 re respon	
Code 11 P Code 12 G Code 13 P Code 14 C Code 15 P Code 16 F Code 17 D	ole Activities Codes: Preparing for the evaluation Coals and objectives conference with instructor Pre-observation conference with instructor Classroom observation of instructor Ost-observation conference with instructor Inal conference with instructor Instructor conference with instructor	(A) disctor (B) instance (C) add (D) suit	trict stan tructiona herence table lea	dards and technicate to curricate to curricate the technicate the	jues/stra ular obje vironme	itegies ectives nt
Allocate the each of the	e average time spent on each criterion (A-D) following evaluation steps:	for	į	erage Tir		
	oranion stops.	**	Α	В	С	D
Code 11	Preparing for the evaluation		1,0	,5		
Code 12	Goals and objectives conference with inst	ructor	1.0			
Code 13	Pre-observation conference with instructo	r	.5	, 5		
	Classroom observation of instructor		Ш	2	2	2
Code 14		. : .	1 1		<u>.</u>	
Code 14 Code 15	Post-observation conference with instructo)r	5	1.0		
Code 15	Post-observation conference with instructor	OF .	.5	1.0	٥5	,5
)r	.5 2	1.0 1 2	°5 2	,5

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you have reported actual data or have provided a good faith and	
you have reported actual data or have provided a good faith estimate perjury under the laws of the State of California to be true and correspond to the content of the cont	te which you "certify (or declare) under penalty of
The same of the cost accomplished the cost	conty PLEASE USE BLUE INV
Employee Signature	Date 10/6/6
If you have any questions, please contact	at steep of the st
PLEASE SUBMIT THIS INFORMATION BY	· TO

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

Please report below the average amount of time spent (in minutes the reimbursable activities for the mandated are spent)	a) by you	u to imp	lomont	
the reimbursable activities for the mandated program.	s) by you	u to imp	ement	each or
-CUSA CI	H			
District/COE Department/	Locatio	n	1	
1 = tara o	α	A	n()	
Employee Name Exact Position		AA	<u>au</u>	·
22/12	n nue	1.		
12mo/11mo/10mo/hrly Fiscal Year:	05-06	06-07	67-08	1
Telephone # Work year length(circle) Circle the years				dina
		ii you ale		uing.
Reimbursable Activities Codes: Evaluati	ion Crite	ria:		
Code 11 Preparing for the evaluation (A) distr	ict stanc	ards and	d test re	sults
Code 13 Pro character and objectives conference with instructor (B) instructor	ructional	techniqu	ies/stra	tegies
Code 14 Classroom character at the desired		o curricu		
Code 15 Post-observation conference with instructor (D) suits	able lear	ning env	ironmer	nt .
Code 16 Final conference with instructor				•
Code 17 District reporting CLASSROOM TEACHER	TIME IS I	NOT-REII	uri ide:	- n
Allocate the average time spent on each criterion (A-D) for				
each of the following evaluation steps:	Ave	rage Tim	e in Min	utes
	Α	В	С	D
Code 11 Preparing for the evaluation		10		
		•		
Code 12 Goals and objectives conference with instructor	15	15		
Code 13 Pre-observation conference with instructor			-	
la min.	~	F	二	-
Code 14 Classroom observation of instructor .		\sim \mid	\smile	
Substitution of institution	C	15	IE	
ESTATE TO MIN	2	C	40	
Code 15 Post-observation conference with instructor		1		`
- 30 MIN	5	EO		5
Code 16 Final conference with instructor				
- COMIN	5	0	10	5
Code 17 District Reporting			-	
23 M IN		20		
		<u> </u>		
EMPLOYEE CERTIFICATION: The State of California requires that school district data for state mandates in order for the district to receive relief	Domenne			
data for state mandates in order for the district to receive reimbursesment. Your sig	nature on	this form	a recor	o or that
				nalty of
perjury under the laws of the State of California to be true and correct based on you of the state of California to be true and correct based on you offermation." This information is used for cost accounting purposes only. PLEASE	ur persor	iai knowle	edge or	
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	ate		$\angle \downarrow \angle \downarrow$	<u> </u>
you have any questions, please contact,	at			
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Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

Please rep	port below the average amount of time presable activities for the mandated prog	spent (in minut	es) by yo	u to imį	olemen	t each of			
District/Co	arlstad	Departmen	t/Location	m	<u> </u>				
Employee	Natancock Name	Exact Posit	rinci	pal		·			
331-6 Telephone	12mb/11mo/10mo/hrly # Work year length(circle)	Fiscal Year: Circle the year	05-06		07-08 e respor	oding.			
Code 11 Pr Code 12 Gr Code 13 Pr Code 14 Cl Code 15 Pc Code 16 Fir Code 17 Di	le Activities Codes: reparing for the evaluation coals and objectives conference with instructor assroom observation of instructor cost-observation conference with instructor cost-observation conference with instructor conference with instructor conference with instructor conference with instructor	(A) disconnection (B) instance (C) action (D) su	ation Crite strict stan structiona therence itable lead R TIME IS	dards ar I techniq to currici rning en	ues/stra ular obje vironme	itegies ectives nt			
Allocate the each of the	Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:				Average Time in Minute				
			A	В	С	D			
Code 11	Preparing for the evaluation		40.	40	40	40			
Code 12	Goals and objectives conference with inst	ructor	5	5	5	5			
Code 13	Pre-observation conference with instructo	r	5	5	5	5			
Code 14	Classroom observation of instructor		45	45	45	45			
Code 15	Post-observation conference with instructo	or	20	20	20	20			
Code 16	Final conference with instructor	-	40	40	40	40			
Code 17	District Reporting		10	(0	10	(0)			
you have repor perjury under the information." The Employee Signal If you have any	questions places contact	stimate which you	ignature o "certify (or your perso SE USE BI Date	n this for declare)	m certifie				

498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - TEMPORARY

Please report below the *average* amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

Telephone Reimbursab Code 11 Pr Code 12 Gr Code 13 Pr Code 14 Cl	12mo/11mo/10mo/hrlv	Exact Position Fiscal Year: Circle the years Evaluat (A) distructor (B) instructor (C) adh	05-06 for whice ion Crite rict standard ructional	06-07 th you ar tria: dards ar techniq	07-08	esults tegies
Code 16 Fil	nal conference with instructor	ASSROOM TEACHER	THE IC	NOT DE	WD: mo	
Allocate the	average time spent on each criterion (A-		1		ne in Min	
each of the	following evaluation steps:		А	В.	С	D
Code 11	Preparing for the evaluation		15	5	1.2 1.	
Code 12	Goals and objectives conference with i	nstructor	15	15		
Code 13	Pre-observation conference with instru	ctor	15			
Code 14	Classroom observation of instructor		60	(0)	10	60
Code 15	Post-observation conference with instru	ctor	40	40	40	
Code 16	Final conference with instructor		20	90	20	
Code 17	District Reporting		15			
ou have reporter to the serious under the serious of the serious o	ERTIFICATION: The State of California requipment of the district to receive reted actual data or have provided a good faith the laws of the State of California to be true at this information is used for cost accounting parture If questions, please contact AIT THIS INFORMATION BY	ambursement. Your sign estimate which you find correct based on your poses only. PLEAS	inature o certify (or our perso E USE Bi Date	n this fon declare) nal know .UE INK .D-15	m certifie under pe ledge or	

498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - TEMPORARY

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUS District/CO	DE	·	Departme	loy/Ct	15	·	
Employee	L Long		Exact Po			ncipe	<u>l</u>
ე <u>ტე 331</u> Telephone		2mo/11mo/10mo/hrly /ork year length(circle	Fiscal Yea Circle the y		6 06-07 ich you a		ding.
Code 11 Pr Code 12 Go Code 13 Pr Code 14 Cl Code 15 Pc Code 16 Fii	e-observation assroom obse ost-observatior	e evaluation tives conference with instr conference with instructor rvation of instructor a conference with instructor with instructor	(A) ructor (B) (C)	district sta instruction adherence suitable le	ndards a al technic to curric arning er	ques/strat cular objec ovironmen	egies ctives t
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each of the	following evalu	tation steps:		А	В	С	D
Code 11	Preparing	for the evaluation		15			
Code 12	Goals and	objectives conference with i	nstructor	15			
Code 13	Pre-observ	ation conference with instru	ctor	15	>	·	
Code 14	Classroom	observation of instructor		120)		
Code 15	Post-obser	vation conference with instru	ctor	30			
Code 16	Final confe	rence with instructor		3C)		- :
Code 17	District Rep	porting			·		
you have report of the policy under the	tred actual data the laws of the S his information that the second of the S results of the		elimbursement. Yo h estimate which s and correct based ourposes only. PL	ur signature you "certify (on your pers EASE USE Date , at	on this fo or declare sonal know BLUE/INK	m certifies) under pe wledge or	s that nalty of

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

Please report below the average amount of time spent (in minute the reimbursable activities for the mandated program.	s) by yo	u to imp	plement	each of
District/COE Department Depa	Location Title 05-06	9M 06-07	Ney.	in which is the second of the
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor (C) add (A) disconnection (B) instructor (C) add (C) add (A) disconnection (B) instructor	tion Crite trict stand tructional nerence t table lear	dards ar technic o curric ning en	lues/strat ular objec vironmen	egies ctives t
Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:			ne in Min	
each of the following evaluation steps:	Α	В	С	D
Code 11 Preparing for the evaluation	15.			
Code 12 Goals and objectives conference with instructor	15			
Code 13 Pre-observation conference with instructor	15			
Code 14 Classroom observation of instructor	4			• • •
Code 15 Post-observation conference with instructor	30			
Code 16 Final conference with instructor	30			
Code 17 District Reporting		·		
EMPLOYEE CERTIFICATION: The State of California requires that school district data for state mandates in order for the district to receive reimbursement. Your section have reported actual data or have provided a good faith estimate which you perjury under the laws of the State of California to be true and correct based on sometimes." This information is used for cost accounting purposes only. PLEASE Employee Signature f you have any questions, please contact PLEASE SUBMIT THIS INFORMATION BY ; TO	ignature of certify (or cour person SE USE BL Date	n this for declare) nal know LUE INK	m certifies) under pe /ledge or	s that nalty of

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

Please rep	port below the average amount oursable activities for the mandated	of time spent (in	minutes	s) by yo	u to im	piemen	t each o
District/Co	ASO RIDOMUINT	Depar	LYS Intention Sist		on)	n.	~Q
Employee 331	Name 5 19 12mg/11mo/10mo/ Work year length(c	Exact <u>hrly</u> Fiscal	Positio	n Title 05-06	06-07	07-08)
Code 11 Pro Code 12 Go Code 13 Pro Code 14 Cla Code 15 Po Code 16 Fin Code 17 Dis	e Activities Codes: eparing for the evaluation pals and objectives conference with e-observation conference with instru- assroom observation of instructor est-observation conference with instructor al conference with instructor strict reporting	uctor uctor CLASSROOM TE	(A) distr (B) instr (C) adh (D) suita	ion Crite rict stand ructional erence t able lear	dards ar I techniq to currici ming en	ues/stra ular obje vironme	tegies ectives nt
each of the f	average time spent on each criterion ollowing evaluation steps:	(A-D) for		Ave	rage Tin	ne in Mir	utes
Code 11				A	В	С	D
Code 11	Preparing for the evaluation	· .		10 m	nite		
Code 12	Goals and objectives conference w	vith instructor		10 a	imit	5	
Code 13	Pre-observation conference with in	structor		10	umil		
Code 14	Classroom observation of instructor	•	:	Yh	のから		
Code 15	Post-observation conference with in	nstructor	·	20 1	yhid	5	
Code 16	Final conference with instructor		· ·	20	Milm	les	
Code 17	District Reporting						
ou have reported the serjury under the serjury under the serjury of the serjury o	Tuestions please control	faith estimate white ue and correct basing purposes only.	ch you "c sed on you PLEASE D	nature or ertify (or ur persor USE BL	this form declare) nal knowl UE INK	n certifies under pe edge or	d of that nalty of

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

Please rep	port below the average ar Irsable activities for the m	nount of time sp	ent (in mi	nutes	s) by yo	u to im	olemen	t each o		
(arlsbad	andated program	11	OPE			•			
District/Co	OE		Departm	ent/	Locatio	on				
	Kich Tubbs	·	Prin	1CIDA	L					
Employee	Name		Exact Po	sitio	n Title			 -		
Telephone		10mo/hrly ingth(circle)	Fiscal Ye			06-07 h you ar		ding.		
Reimbursab	le Activities Codes:			-	on Crite			· · · · · ·		
Code 11 Pr	eparing for the evaluation	,	(A			<u>ria:</u> dards ar	d test re	esults		
Code 12 G	oals and objectives conferen	nce with instructor	* . (B) instr	uctional	techniq	ues/stra	tegies		
Code 14 Cl	e-observation conference was sroom observation of inst	ith instructor	(C	adh	erence 1	o currici	ular obje	ectives		
Code 15 Po	st-observation conference	with instructor	(1)) Sulla	anie ieai	ning en	vironme	nt		
Code 16 Fil	nal conference with instructo	or .								
	strict reporting		OOM TEAC	HER	TIME IS	NOT RE	MBURS	ED .		
each of the	liocate the average time spent on each criterion (A-D) for ach of the following evaluation steps:				Ave	Average Time in Minutes				
				• •	Α	. В.	С	D		
Code 11	Preparing for the evaluati	on			10					
Code 12	Goals and objectives con	ference with instruc	ctor		10	10	10	5		
Code 13	Pre-observation conferen	ce with instructor	-		5	10	10	10		
Code 14	Classroom observation of	instructor		: .	5	15	15	10		
Code 15	Post-observation conferer	nce with instructor	•		5	10	10	10		
Code 16	Final conference with insti	ructor			10	10	10	10		
Code 17	District Reporting				:5	5	5	5		
EMPLOYEE O	EDTIFICATION: The Court of) . W.C.								
ou have reporteriury under the	ERTIFICATION: The State of C nandates in order for the districted actual data or have provide the laws of the State of Californ his information is used for cos	ed a good faith esti	rsement. Yourself mate which	our sig you "c	nature o ertify (or	n this for declare)	m certifie			
Employee Sign	ature <u>Fuka</u>	& Tobb				9-24	-08	-		
f you have any	questions, please contact				_					
PLEASE SUBM	IIT THIS INFORMATION BY $_$	·	; TO							

498/83 The Stull Act (K-12)

Please re the reimb	port below the average amount of time spent (in minute ursable activities for the mandated program.	s) by yo	ou to im	plemen	t each o
District/C	lobat Teffers	SUN		<u> </u>	
Employe	of Van Vooren	e l'		·	 .
(<u>160) 33/</u> Telephon	- Vi Janes Intollion Viscal Year				
Code 11 P Code 12 G Code 13 P Code 14 C Code 15 P Code 16 Fi	reparing for the evaluation (A) distribution and objectives conference with instructor (B) instribution conference with instructor (C) address come observation of instructor ost-observation conference with instructor inal conference with instructor	tion Crite trict stan tructiona nerence table lea	dards ai I technic to curric rning en	iues/stra ular obje vironme	itegies ectives nt
Allocate the	e average time spent on each criterion (A-D) for			ne in Mil	
each of the	following evaluation steps:	A	В	С	T D
Code 11	Preparing for the evaluation	15			
Code 12	Goals and objectives conference with instructor	10	10	5	5
Code 13	Pre-observation conference with instructor	2	2	2	2
Code 14	Classroom observation of instructor	2	10	10	10
Code 15	Post-observation conference with instructor	2	10	E	10
Code 16	Final conference with instructor	ID	10	10	10
Code 17	District Reporting	5	5	5	5
you have repor perjury under the information." T Employee Sign	ERTIFICATION: The State of California requires that school district nandates in order for the district to receive reimbursement. Your signed actual data or have provided a good faith estimate which you the laws of the State of California to be true and correct based on your his information is used for cost accounting purposes only. PLEAS ature	gnature of certify (or person E USE Bl	n this for declare) nal know _UE INK	m certifie under po ledge or	ord of es that enalty of
PLEASE SUBM	IIT THIS INFORMATION BY; TO;				·

498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - TEMPORARY

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

Code 11 P Code 12 G Code 13 P Code 14 C Code 15 P	e # le Activities reparing for oals and object-observation lassroom object-observational conferer	the evaluation jectives conference with on conference with instructor is conference with instructor ion conference with instructor	/hrly F circle) ci	iscal Y ircle the ! ((Evaluat A) distr B) instr C) adh D) suit	05-06 for which ion Crite ict stand ructional erence able lea	eria: dards a l technic to curric ming er	nd test reques/stra	esults ategies ectives nt
Allocate the	average tim	le spent on each criterio	n (A-D) for	OM 153	CHER	-		me in Mi:	
each of the	following ev	aluation steps:				A	B	C	D
Code 11	Preparir	ng for the evaluation				10	10	10	10
Code 12	Goals a	nd objectives conference	with instructo	r		10	10	10	10
Code 13	Pre-obs	ervation conference with i	nstructor			5	5	5	5
Code 14	Classroo	om observation of instructo	or		:	10-	10	10	10
Code 15	Post-obs	servation conference with	instructor			10	10	10	10
Code 16	Final cor	nference with instructor				10	10	10	10
Code 17	District R	Reporting				5	5	5	5
ou have repo erjury under t tormation." T mployee Sigr	rted actual da he laws of the This information	DN: The State of California order for the district to receits or have provided a good state of California to be on is used for cost accounting the	d faith estima	ement. ate whic	Your sig th you "c ed on yo PLEASE	nature c ertify (o	on this for declare	m certifie) under pe	

498/83 The Stull Act (K-12)

Please report below the average amount of time spent (in minutes the reimbursable activities for the mandated program.) by yo	u to imp	lement	each of	
(45D) Pr	refe	06	en	. ·	
Robert Devich	M	on Oas	2		
23)-(02/D) 12-0/11-0/11	05-06		07-08 e respon	ding.	
Code 12 Goals and objectives conference with instructor (B) instr	ict stand uctional erence t able lear	dards an technique o curricu ning env	ues/stra ilar obje vironmer	tegies ctives nt	
Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:	Ave	rage Tin	Time in Minutes		
	Α	В	С	D	
Code 11 Preparing for the evaluation				30	
Code 12 Goals and objectives conference with instructor		-		60	
Code 13 Pre-observation conference with instructor				30	
Code 14 Classroom observation of instructor	-1			30	
Code 15 Post-observation conference with instructor				30	
Code 16 Final conference with instructor				30	
Code 17 District Reporting					
If you have any questions, places a feet of	ertify (or or person USE BL	n this forr declare)	n certifies under pe edge or	that nalty of	

SA 1.7b

Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - PROBATIONARY

	100714	SIAM	<u> </u>		TEMPO
Please report below the average amount of time spent (in mi the reimbursable activities for the mandated program.	nutes) by yo	u to im	olemen	t each o	1
	insellia				Empinish
District			<u> </u>		Empred in
Stare Ahle	nent/Location	73	•		, Reiman
Employee Name Exact Po		<u>:-</u>			2 Probationar
33/600 (12mo/11mo/10mo/hrly Fiscal Ye	05 05			١	1
Alcohono #	ar: 05-06 years for whic		(07-08 e respo	nding.	Brth Propositions
Reimbursable Activities Codes:	raluation Crite				= Brth Kron diss.
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor) district stan) instructiona) adherence) sultable lea	dards ar I technic to curric ming en	ues/stra ular obje vironme	itegies ectives nt	projection as in
TEAC TEAC	HER TIME IS	NOT RE	IMBURS	ED	7 (a) Lower 1:
Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:	Ave	erage Tir	ne in Mi	nutes	1 2 20 24
	А	. В	С	D	tand
Code 11 Preparing for the evaluation	13	13	(3	1.3] Som
Code 12 Goals and objectives conference with instructor	18	18	8	8	1,
Code 13 Pre-observation conference with instructor	18	10	181	18	Copied
Code 14 Classroom observation of instructor	9	9	9	9	from perman
Code 15 Post-observation conference with instructor	Q	9	q	9	- he is doubling
Code 16 Final conference with instructor					
Code 17 District Reporting)	1	1	١	
				<u> </u>	ı
MPLOYEE CERTIFICATION: The State of California requires that school of lata for state mandates in order for the district to receive reimbursement. You have reported actual data or have provided a good faith estimate which erjury under the laws of the State of California to be true and correct based formation." This information is used for cost accounting purposes only. Propose Signature you have any questions, please pontact	you "certify (or you "certify (or your person LEASE USE B	n this for declare hal know LUE INK	m certifie) under p	es that enalty of	
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Employee AveRAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

the reimb	eport below the average amount of time spoursable activities for the mandated program	eur (ur unitiale	s) by y	ou to im	ipiemei	nt eac	
District/C District/C Employe	cos Mercele Pe Name 1-5300 12mo/11mo/20mo/hrly	Department Exact Position Fiscal Year:	lle Logati	on A	7 07-08		
Telephor	ne# Work year length(circle)	Circle the years			re respo	, Inding,	
Code 11 F Code 12 C Code 13 F Code 14 C Code 15 F Code 16 F Code 17 D	ble Activities Codes: Preparing for the evaluation Goals and objectives conference with instructor Pre-observation conference with instructor Classroom observation of instructor Post-observation conference with instructor Final conference with instructor Classroom observation CLASSR	Evaluat (A) dist (B) inst (C) adh (D) suit	tion Crit trict star tructiona nerence table lea	eria: dards a ll technic to curric irning en	nd test i ques/str cular obj vironme	results ategie ective: ent	
Allocate the	Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:			Average Time in Minutes			
			A	B.	С	TD	
Code 11	Preparing for the evaluation					+	
Code 12	Goals and objectives conference with instruc	tor	15	15	15	15	
Code 13	Pre-observation conference with instructor		12	1/2	12	10	
Code 14	Classroom observation of instructor		12	12	12	1,2	
Code 15	Post-observation conference with instructor		12	(2		12	
Code 16	Final conference with instructor		18	12	12	12	
Code 17	District Reporting				16		
ou have repor erjury under t formation." T mployee S <u>ig</u> n	ERTIFICATION: The State of California requires the mandates in order for the district to receive reimburated actual data or have provided a good faith esting the laws of the State of California to be true and conflict information is used for cost accounting purpose nature Official California (California to be true) Official California (California to be true) Official California (California to be true) Official California (California to be true) Official California (California to be true) Official California (California requires the california requires req	nate which you "o rect based on yo es only. PLEASE	ertify (or ur perso USE BL	n this for declare) nal know UE INK	n certifie under pe ledge or	es that enalty o	

Schedule 1B Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2007-2008 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Principals and Vice Principals". Source: Schedule 1BB Probationary and SA 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B&C
# of reimbursable K-12 evaluations	85	. 85
Avg. time p/ evaluation preparation	17.5	40.0
Total Time (in minutes)	1488	3400
Per Hour	60	60
Hours Worked (Code 11)	24.8	56.7
# of reinshause his IC 40 and his		
# of reimbursable K-12 evaluations	85	85
Avg. time p/ goals & obj. conf. with instructor	17.5	37.5
Total Time (in minutes) Per Hour	1488	3188
· -· · · - • ·	60	60
Hours Worked (Code 12)	24.8	53.1
# of reimbursable K-12 evaluations	85	85
Avg. time p/ pre-observation conf. with instructor	11.0	22.5
Total Time (in minutes)	935	1913
Per Hour	60	60
Hours Worked (Code 13)	15.6	31.9
# of reimbursable K-12 evaluations	85	85
Avg. time p/ classroom observation of instructor	20.0	55.0
Total Time (in minutes)	1700	4675
Per Hour	60	60
Hours Worked (Code 14)	28.3	77.9
# of reimbursable K-12 evaluations		a.
Avg. time p/ post-observation conf. with instructor	85	85
Total Time (in minutes)	<u>20.0</u> 1700	35.0
Per Hour		2975
Hours Worked (Code 15)	60 28.3	60
Tiodio Wolfied (Odde 10)	20.3	49.6
# of reimbursable K-12 evaluations	85	85
Avg. time p/ final conf. with instructor	22.5	40.0
Total Time (in minutes)	1913	3400
Per Hour	60	60
Hours Worked (Code 16)	31.9	56.7
# of reimbursable K-12 evaluations		85
Avg. time p/ district reporting		12.5
Total Time (in minutes)		1063
Per Hour		60
Hours Worked (Code 17)		17.7

Conclusion: Findings will go forward to Combined Schedule 2.

*Activity Codes Code 11- Preparing for the evaluation Code 12- Goals and objectives conference with instructor Code 13- Pre-observation conference with instructor Code 14- Classroom observation of instructor Code 15- Post-observation conference with instructor Code 16- Final conference with instructor Code 17- District reporting

*Evaluation Criteria

(A) District standards and test results
 (B) Instructional techniques/strategies
 (C) Adherence to curricular objectives

Schedule 1A Carlsbad Unified School District 498/83 Stull Act - Probationary Teacher Evaluations Fiscal Year: 2006-2007 Time Summary

Purpose: To summarize total hours spent by administrative staff on "probationary" teacher evaluations.

Source: Schedule 2A and 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
# of reimbursable K-12 evaluations	57	57
Avg. time p/ evaluation preparation	20	40
Total Time (in minutes)	1140	2280
Per Hour	60	60
Hours Worked (Code 11)	19.0	38.0
# of reimbursable K-12 evaluations	57	57
Avg. time p/ goals & obj. conf. with instructor	20	45
Total Time (in minutes)	1140	2565
Per Hour	60	60
Hours Worked (Code 12)	19.0	42.8
# of reimbursable K-12 evaluations	57	57
Avg. time p/ pre-observation conf. with instructor	7	15
Total Time (in minutes)	399	855
Per Hour	60	60
Hours Worked (Code 13)	6.7	14.3
# of reimbursable K-12 evaluations	57	57
Avg. time p/ classroom observation of instructor	20	60
Total Time (in minutes)	1140	3420
Per Hour	- 60	60
Hours Worked (Code 14)	19.0	57.0
# of reimbursable K-12 evaluations	57	57
Avg. time p/ post-observation conf. with instructor	20	40
Total Time (in minutes)	1140	2280
Per Hour	60	60
Hours Worked (Code 15)	19.0	38.0
# of reimbursable K-12 evaluations	£7	
Avg. time p/ final conf. with instructor	57	57
Total Time (in minutes)	25 1425	40
Per Hour		2280
Hours Worked (Code 16)	23.8	60 38.0
# of reimbursable K-12 evaluations		
Avg. time p/ district reporting		57
Total Time (in minutes)		15
Per Hour		855
Hours Worked (Code 17)		60
Floring Andrea (Oode 11)		14.3

Conclusion: Findings will go forward to the Schedule 1.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives
- (D) Suitable learning environment

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PRINT DATE 1/15/2009 CBAD SA 06-07.xls

Schdule 1BB Carlsbad Unified School District 498/83 Stull Act Probationary Fiscal Years 2007-2008 2 year time study

Prupose: To calculate a 2 year rolling average to be used for the 2007-2008 Stull Act.

Source: Schedule 1A from 2006-2007 and Schedule 4 from 2007-2008. (See 06-07 source in 06-07 claim.)

Findings:

Probationary Evaluations

	2006	-2007	2007	-2008	Ave	erage
Activities	A	B&C	Α	B&C	Α	B&C
CODE 11	20.0	40.0	15.0	40.0	17.5	40.0
CODE 12	20.0	45.0	15.0	30.0	17.5	37.5
CODE 13	7.0	15.0	15.0	30.0	11.0	22.5
CODE 14	20.0	60.0	20.0	50.0	20.0	55.0
CODE 15	20.0	40.0	20.0	30.0	20.0	35.0
CODE 16	25.0	40.0	20.0	40.0	22.5	40.0
CODE 17		15.0		10.0		12.5

Conclusion: Findings to go forward to schedule 1B.

Activities

- Code 11- Preparing for the evaluation
- Code 12- Goals and objectives conference with instructor
- Code 13- Pre-observation conference with instructor
- Code 14- Classroom observation of instructor
- Code 15- Post-observation conference with instructor
- Code 16- Final conference with instructor
- Code 17- District reporting

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives

Carlsbad Unified School District Fiscal Year: 2007-2008 Probationary Time Study 498/83 Stull Act Schedule 4

Purpose: To calculate time spent by "Various Principals and Vice Principals" on Stull Act. Source: SA 1.7-B Probationary Timesheets.

Findings:

								*	Activi	*Activity Codes	des		-				
			_	-			12		Г		13	_				14	
Schoolsite	Staff	⋖	m	ပ	۵	A	В	ပ	۵	A	m	C	٦	4	u	ر	2
Aviara Oaks Elementary	Kimberly Ann Huesing	20	50	20	20	30	30	30	99	30	8	8	8	45	45	55	45
Buena Vista	Tina Howard	**120	09			09				99	09			**240	**240	**240	**240
Calavera Hills Elementary	Leslie Harden		10			15	15				2	2		5	15	15	10
Calavera Hills Middle	Catina Hancock	40	40	40	40	z,	2	5	2					45	45	45	45
Carlsbad Valley Academy	Keith Holley	15	15			15	15			15				09	09	09	9
Cartsbad High	Bill Lord	15				15				15				**120			
	Marjorie Giordani	15				15				15	-			**240			
	Tom Bloomquist	10				10				2				**240			
Норе	Rich Tubbs	10				5	9	9	വ	ည	19	9	2	5	15	15	10
Jefferson	Carol Van Vooren	15				19	9	Ω.	2	2	2	2	2	2	10	5	10
Kelly	Theresa Armstrong	10	10	10	10	10	10	10	9	2	2	2	5	10	10	10	10
Pacific Rim	Robert Devich				30				09				30				30
Poinsetta	Steve Ahle	ιΩ	5	5	2	27	27	27	27	27	27	27	27	27	27	27	27
Valley middle	Julio Cesar Morales			-		15	15	15	15	12	12	12	12	12	12	12	12
Averages		16	23	19	21	18	15	15	20	18	19	13	16	23	27	27	26
Summation of criteria B and C	nd C	į	42	2		ļ	် 	 _	!	 -	32		1]		53	 - -
Averages to be used		15	40	0		15	3			15	30			20	45	50	
					II				11				"		'		

Conclusion: Findings will go forward to Schedule 1BB.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Final conference with instructor Code 17- District reporting Code 16-

Evaluation Criteria

(A) District standards and test results

Instructional techniques/strategies

Adherence to curricular objectives

(B) Instructional techniques/strateg(C) Adherence to curricular objecti(D) Suitable learning environment

**Times were not used to calculate averages

Schedule 4 Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2007-2008 Probationary Time Study

Purpose: To calculate time spent by "Various Principals and Vice Principals" on Stull Act. Source: SA 1.7-B Probationary Timesheets. Findings:

		_					*Activity Codes	it Co	des				
			_	15			16					17	
Schoolsite	Staff	Α	В	ပ	۵	4	В	ပ	٥	4	В	ပ	2
Aviara Oaks Elementary	Kimberly Ann Huesing	30	30	90	30	30	30	8	99	30	30	30	30
Buena Vista	Tina Howard	09	**120			**240	**120	8	09	**240	**240	**240	**240
Calavera Hills Elementary	Leslie Harden	2	10	10	2	5	10	10	5		30		
Calavera Hills Middle	Catina Hancock	20	20	20	20	40	40	8	40	5	5	75	5
Carlsbad Valley Academy	Keith Holley	40	40	40		20	20	20		15			,
Carlsbad High	Bill Lord	30				30							
	Marjorie Giordani	30				30							
	Tom Bloomquist	40				20							
Норе	Rich Tubbs	5	10	9	10	2	5	2	₂	5	75	5	5
Jefferson	Carol Van Vooren	2	10	5	10	10	10	10	9	5	5	LC 	5
Kelly	Theresa Armstrong	10	10	10	10	10	10	10	10	5	5	5	5
Pacific Rim	Robert Devich				30				30				
Poinsetta	Steve Ahle	12	12	12	12					1	-	-	-
Valley Middle	Julio Cesar Morales	12	12	12	12	18	18	18	18				-
Averages		23	11	17	15	20	18	23	23	6	12	ō	lo
Summation of criteria B a	B and C		34	-]	4				- ! 2	 	,
Averages to be used		20	30	0		22	40	0			1		
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Conclusion: Findings will go forward to Schedule 1BB.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor Code 16- Final conference with instructor

Code 17- District reporting

Evaluation Criteria

Criteria A - district standards and test results Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives Criteria D - suitable learning environment **Times were not used to calculate averages

- 4 Teaches

Employee AVERAGE Time Record for Mandated Costs

498/83 The Stull Act (K-12)

Please report below the <i>average</i> amount of time spent (in minute the reimbursable activities for the mandated program.	s) by yo	u to imp	olement	each of
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Department	Locatio	PR		
Employee Name Fract Position	ipce	<u> </u>		
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1 Ada 50 Dec abase and .	ructional	techniq	ues/stra	tegies
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Toda 15 Fusi-observation conference with instructor	abic icui	imig en	VII OTITITEI	iL
Code 16 Final conference with instructor Code 17 District reporting CLASSROOM TEACHER				. •
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Code 12 Goals and objectives conference with instructor	30	30	30	30
Code 13 Pre-observation conference with instructor	30	30	30	3D
Code 14 Classroom observation of instructor	45	45	45	45
Code 15 Post-observation conference with instructor	30	30	30	30
Code 16 Final conference with instructor	30	30	30	30
Code 17 District Reporting	30	30	30	30
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EMPLOYEE CERTIFICATION: The State of California requires that school distriction is tate mandates in order for the district to receive reimbursement. Your since the provided a good faith estimate which you "berjury under the laws of the State of California to be true and correct based on your state of the state of California to be true and correct based on your state of the state of the cost accounting purposes only. PLEAS	gnature o certify (or	n this for declare)	m certifie	
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you have any questions, please contact	, at	//		

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Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - PROBATIONARY

Please report below the *average* amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/Co TINA Employee (70) 331 Telephone	Name 1-5400 Work year length(circle)	Ruとい Department/ Pにい Exact Positio Fiscal Year: Circle the years	〜(P૯ n Title 05-06	06-07		ding.
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Code 14	Classroom observation of instructor		4.0	2	4	4
Code 15	Post-observation conference with instructor		l ·	2	-	
Code 16	Final conference with instructor	-	4	2.	l	j
Code 17	District Reporting		4	4	4	(/

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature	Date_ (8) 16 / 08
If you have any questions, please contact	, at
PLEASE SUBMIT THIS INFORMATION BY; TO; TO	

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Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12) Routine Evaluations of Instructors - PROBATIONARY

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Code 13	Pre-observation conferen	nce with instructor				7	. ·
Code 14	Classroom observation o	f instructor		5	, E	5	10
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Code 16	Final conference with ins	tructor			10	10	5.
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Please report below the average amount of time spent (in minutes the reimbursable activities for the mandated program.	s) by ya	u to im	plemen	t each of
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District/COE Department/	Location NCIT	on >M		
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l elephone # Work year length(circle) Circle the years	for whic			nding.
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Code 15 Post-observation conference with instructor	adie leal	rning en	vironme	nţ
Code 16 Final conference with instructor	•			
Code 17 District reporting CLASSROOM TEACHER	TIME IS	NOT RE	MBURS	ED
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Code 12 Goals and objectives conference with instructor	5	5	5	5
Code 13 Pre-observation conference with instructor	0		0	0
Code 14 Classroom observation of instructor	45	45	45	4
Code 15 Post-observation conference with instructor	20	20	20)	20
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Code 17 District Reporting	5	5	5	5
EMPLOYEE CERTIFICATION: The State of California requires that school district data for state mandates in order for the district to receive reimburgament.	·			
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Employee Signature D	ate/() ///	10 V	*
If you have any questions, please contact	-	1.8	1 0	
PLEASE SUBMIT THIS INFORMATION BY; TO;				

Routine Evaluations of Instructors - PROBATIONARY

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

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Employee	Name	Exact Position	-C+0(
221-	5200 (12mg/11mg/10mg/hrly)					\
Telephon				06-07)
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Code 15 P	ost-observation conference with instructor	(D) sun	able lea	ming en	vironme	nt
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-			Date	10-17	5-08	
	y questions, please contact Keit	th Holley	, at	331-5	500	
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Routine Evaluations of Instructors - PROBATIONARY

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE Department Employee Name Exact Posi Telephone # Department Exact Posi Work year length(circle) Fiscal Year: Circle the year Reimbursable Activities Codes:	Sch tion Title 05-06 rs for whic	06-07 h you ar	07-08	
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Code 13 Pre-observation conference with instructor	13	·		
Code 14 Classroom observation of instructor	120	ŕ		
Code 15 Post-observation conference with instructor	30			
Code 16 Final conference with instructor	30			
Code 17 District Reporting				
EMPLOYEE CERTIFICATION: The State of California requires that school distributed data for state mandates in order for the district to receive reimbursement. Your you have reported actual data or have provided a good faith estimate which you perjury under the laws of the State of California to be true and correct based on information." This information is used for cost accordating purposes only. PLEA Employee Signature If you have any questions, please contact	signature of a signat	n this fon declare)	m certifie: under pe	
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Code 14	Classroom observation of instructor		4		-hrs		18 Refer
Code 15	Post-observation conference with instructo	г	30				Browde
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MPLOYEE CERTIFICATION: The State of California requires that school district lata for state mandates in order for the district to receive reimbursement. Your signound have reported actual data or have provided a good faith estimate which you "cerjury under the laws of the State of California to be true and correct based on your formation." This information is used for soft accounting purposes only. PLEASE mployee Signature	nature of ertify (or ur perso EUSE BLate	declare) nal knowl	n certifies under pe edge or	d of s that nalty of

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Code 12 Goals and objectives conference with instructor	5	10	10	5
Code 13 Pre-observation conference with instructor	5	10	10	5
Code 14 Classroom observation of instructor	5	15	15	10
Code 15 Post-observation conference with instructor	5	10	10	10
Code 16 Final conference with instructor	5	5	10	5
Code 17 District Reporting	5	5	5	5
EMPLOYEE CERTIFICATION: The State of California requires that school district at a for state mandates in order for the district to receive reimbursement. Your you have reported actual data or have provided a good faith estimate which you berjury under the laws of the State of California to be true and correct based on information." This information is used for cost accounting purposes only. PLEA Employee Signature Type of you have any questions, please contact PLEASE SUBMIT THIS INFORMATION BY; TO;	signature of "certify (o your person SE USE E	on this for r declare onal know LUE INK	m certifie) under pe vledge or	s that enalty of

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Code 13	Pre-observation conference with instructo	Γ	2	2	2	2
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ou have reporte	e laws of the State of California to be true and is information is used for cost accounting purp	Correct based on you	rice or	nai Knowi	edge or $\langle \gamma \rangle$	

Please report below the average amount of time spetthe reimbursable activities for the mandated program	∍nt (in minutes) by	you to imp	lement	each of
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District/COE /	Department/Loc	tion	·	
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Cada 47 Distriction				. •
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Code 17 District Reporting	5	•		->
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498/83 The Stull Act (K-12)

Please report below the <i>average</i> amount of time spent (in minutes the reimbursable activities for the mandated program.	s) by you	u to imp	lement	each of
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Employee Name Exact Position	n Title	<u> </u>		
83/-10200 dome 140 110	05-06	06-07 h you ar e) ding.
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Code 11 Preparing for the evaluation				30
Code 12 Goals and objectives conference with instructor				60
Code 13 Pre-observation conference with instructor		-		80
Code 14 Classroom observation of instructor			-	30
Code 15 Post-observation conference with instructor				30
Code 16 Final conference with instructor				30
Code 17 District Reporting				
EMPLOYEE CERTIFICATION: The State of California requires that school district data for state mandates in order for the district to receive reimbursement. Your signou have reported actual data or have provided a good faith estimate which you "cerjury under the laws of the State of California to be true and correct based on your formation." This information is used for cost accounting purposes only. PLEASE submitted in the state of California to be true and correct based on your formation. This information is used for cost accounting purposes only. PLEASE submitted in the state of California to be true and correct based on your formation. This information is used for cost accounting purposes only. PLEASE SUBMITTHIS INFORMATION BY; TO;	inature or certify (or our person E USE BL Date	n this forr declare) nal knowl .UE INK	n certifie under pe edge or	s that enalty of

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Employee AVERAGE Time Record for Mandated Costs * 498/83 The Stull Act (K-12)

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33/16	\mathcal{O}	Exact Position	on ilitle		-	
Telephon		Fiscal Year:	05-06		07-08	
	e # Work year length(circle)	Circle the years	for whic	h you ar	e respor	iding.
Reimbursab	le Activities Codes:		. 0.1	-		·
Code 11 P	reparing for the evaluation	/ A 1 -11 - 1	ion Crite	<u>ria:</u> dordo		
Code 12 G	ioals and objectives conference with instructor	(R) inst	nictora	uards.ar I toobisis	id test re ues/stra	Suits
Code 12 P	re-observation conference with instructor	, ,	i uctivitia	to curric	ues/sīra Jar obje	tegies
Code 14 C	lassroom observation of instructor	(D) suit	able lea	mina em	vironme	cuves
Code 15 P	ost-observation conference with instructor	(-)				n,
Code 15 F	nal conference with instructor istrict reporting CLASSRI		•			
1		DOM TEACHER	TIME IS	NOT RE	MBURS	≣D
Allocate the	e average time spent on each criterion (A-D) for following evaluation steps:		1		ne in Min	
			Α	В	С	D
Code 11	Preparing for the evaluation		5	. 5	5	5
Code 12	Goals and objectives conference with instruct	or	2.7	27	27	27
Code 13	Pre-observation conference with instructor	·	27	27	27	27
Code 14	Classroom observation of instructor		27	27	27	27
Code 15	Post-observation conference with instructor					
			1.5	12	12	12
Code 16	Final conference with instructor	1				
			Ī	1	Ī	
Code 17	District Reporting					
· · · · · · · · · · · · · · · · · · ·			1	1	1	./
MPLOYEE C	ERTIFICATION: The State of California marris - 4		·			
ou have repor eriury under ti	ERTIFICATION: The State of California requires the nandates in order for the district to receive reimburnated actual data or have provided a good faith estimate laws of the State of California to be true and corphis information is used for cost accounting purpose	ate which you "c	nature or ertify (or	n this form declare) nal knowl UE INK	n certifies under per edge or	d of that naity of
			ate	1114	108	<u> </u>
	questions, please contact		at		_	
LEASE SUBM	IT THIS INFORMATION BY	_; TO				
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498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - PROBATIONARY

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

	CUSD	* : AA .	/			
District/C	OF	VM:				
		Department/	Location	on		
/W	lio Cesar Morales	Priv	دمیما	.('		
Employe	e Name	Event Denit		<u> </u>		
	•	Exact Position	n ritte	!		
	12mo/11mo/10mo/hrly	Fiscal Year:	05-06	00.05	7 07 00	
Telephon	ne # Work year length(circle)				7 07-08	
	<u> </u>	Circle the years	tor whic	th you a	re respoi	nding,
Reimbursat	ole Activities Codes:	England				
Code 11 P	reparing for the evaluation	/# \ " .	on Crite			
Code 12 G	Soals and objectives conference with instruc	for (R) inst	ici sian	dards a	nd test re	esults
Code 13 P	re-observation conference with instructor		uctiona	technic	ues/stra	ategie:
Code 14 C	lassroom observation of instructor	(C) adii	erence	io curric	ular obje	ectives
Code 15 P	ost-observation conference with instructor	(D) Suit	able lea	ming en	vironme	nt
Code 16 F	inal conference with instructor					
Code 17 D	intelef	ROOM TEACHER	TIME IC	NOT DO		
Allocate the	e average time spent on each criterion (A-D) f	- TEAGHER	141112 13	NOTRE	IMBURS	ED
each of the	following evaluation steps:	or	Ave	rage Tir	ne in Mir	iutes
			A	В	С	
Code 11	Preparing for the evaluation			 	 	D
	repaining for the evaluation					1
0 1 15						
Code 12	Goals and objectives conference with instr	uctor				
			15	1	15	15
Code 13	Pre-observation conference with instructor		· · · · · · ·		 	+
	The state of the s		12	(2		1
Code 14	01			12	12	12
C006 14	Classroom observation of instructor		_			
			12	12	12	172
Code 15	Post-observation conference with instructor					
	was man manucio	1	12	12	12	, ,
Code 16	part 1		<u>` </u>	12	12	10
Cade 16	Final conference with instructor	ĺ		151		
			18	18	18	18
Code 17	District Reporting					
	· •		ĺ			
MPLOYEE C	ERTIFICATION: The State of California requires mandates in order for the district to receive reight	41.				
ata for state п	nandates in order for the district to receive reimb rted actual data or have provided a good faith es	that school district	personne	el mainta	in à reco	rd of
ou have repor	rted actual data or have provided a good faith es he laws of the State of California to be true and	timate which you "c	nature of	i this for declare)	n certifie:	s that
formation " T	he laws of the State of California to be true and this information) is used for cost accounting pure	correct based on you	Jr Dersoi	nal know	unaer pe ledae or	inalty o
	/ / Just a specific purp	oses only. PLEASE	USE BL	UE INK	adge vi	
mployee Sign	ature		-i- /	17.08	<i>></i>	
you have any	questions, please contact					
EASE SUBM	THIS INFORMATION BY	·	aı			

Schedule 1C Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2007-2008

Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Principals and Vice Principals".

Source: Schedule 1CC Permanent and SA 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B&C
# of reimbursable K-12 evaluations	225	225
Avg. time p/ evaluation preparation	14.5	30.0
Total Time (in minutes)	3263	6750
Per Hour	60	60
Hours Worked (Code 11)	54.4	112.5
# of reimbursable K-12 evaluations	225	225
Avg. time p/ goals & obj. conf. with instructor	16.0	30.0
Total Time (in minutes)	3600	6750
Per Hour	60	60
Hours Worked (Code 12)	60.0	112.5
# of reimbursable K-12 evaluations	225	225
Avg. time p/ pre-observation conf. with instructor	13.5	
Total Time (in minutes)	3038	25.0 5625
Per Hour	60	60
Hours Worked (Code 13)	50.6	93.8
(5335)	30.0	33.0
# of reimbursable K-12 evaluations	225	225
Avg. time p/ classroom observation of instructor	22.5	45.0
Total Time (in minutes)	5063	10125
Per Hour	60	60
Hours Worked (Code 14)	84.4	168.8
# of reimbursable K-12 evaluations	225	225
Avg. time p/ post-observation conf. with instructor	20.0	32.5
Total Time (in minutes)	4500	7313
Per Hour	60	60
Hours Worked (Code 15)	75.0	121.9
# of reimbursable K-12 evaluations	225	225
Avg. time p/ final conf. with instructor	20.0	35.0
Total Time (in minutes)	4500	7875
Per Hour	60	60
Hours Worked (Code 16)	75.0	131.3
# of reimbursable K-12 evaluations		225
Avg. time p/ district reporting		15.0
Total Time (in minutes)		3375
Per Hour		60
Hours Worked (Code 17)		56.3

Conclusion: Findings will go forward to Combined Schedule 1.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

*Evaluation Criteria

(A)	District standards and test results
(B)	Instructional techniques/strategies
(0)	A allegations and the control of the control of

Adherence to curricular objectives

Schedule 1B Carlsbad Unified School District 498/83 Stull Act - Permanent Teacher Evaluations Fiscal Year: 2006-2007 Time Summary

Purpose: To summarize total hours spent by administrative staff on "permanent" teacher evaluations. Source: Schedule 2B and 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
# of reimbursable K-12 evaluations	280	280
Avg. time p/ evaluation preparation	15	30
Total Time (in minutes)	4200	8400
Per Hour	60	60
Hours Worked (Code 11)	70.0	140.0
# of reimbursable K-12 evaluations	280	280
Avg. time p/ goals & obj. conf. with instructor	20	260 40
Total Time (in minutes)	5600	11200
Per Hour	60	
Hours Worked (Code 12)	93.3	186.7
#-6		
# of reimbursable K-12 evaluations	280	280
Avg. time p/ pre-observation conf. with instructor	12	20
Total Time (in minutes)	3360	5600
Per Hour		60
Hours Worked (Code 13)	56.0	93.3
# of reimbursable K-12 evaluations	280	280
Avg. time p/ classroom observation of instructor	30	55
Total Time (in minutes)	8400	15400
Per Hour	60	60
Hours Worked (Code 14)	140.0	256.7
# of reimbursable K-12 evaluations	200	
Avg. time p/ post-observation conf. with instructor	280	280
Total Time (in minutes)	20	30
Per Hour	5600	8400
Hours Worked (Code 15)	60	60
	93.3	140.0
# of reimbursable K-12 evaluations	280	280
Avg. time p/ final conf. with instructor	20	35
Total Time (in minutes)	5600	9800
Per Hour	60	60
Hours Worked (Code 16)	93.3	163.3
# of reimbursable K-12 evaluations		280
Avg. time p/ district reporting		
Total Time (in minutes)	•	15
Per Hour		4200
Hours Worked (Code 17)		60
		70.0

Conclusion: Findings will go forward to the Schedule 1.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

*Evaluation Criteria

(A) District standards and test results

(B) Instructional techniques/strategies

(C) Adherence to curricular objectives

(D) Suitable learning environment

Schdule 1CC Carlsbad Unified School District 498/83 Stull Act Permanent Fiscal Years 2007-2008 2 year time study

Prupose: To calculate a 2 year rolling average to be used for the 2007-2008 Stull Act.

Source: Schedule 1B from 2006-2007 and schedule 5 from 2007-2008. (See 06-07 source in 06-07 claim.)

Findings:

Permanent Evaluations

	2006	-2007	2007	-2008	Ave	erage
Activities	<u> </u>	B&C	Α	B&C	Α	B&C
CODE 11	15.0	30.0	14.0	30.0	14.5	30.0
CODE 12	20.0	40.0	12.0	20.0	16.0	30.0
CODE 13	12.0	20.0	15.0	30.0	13.5	25.0
CODE 14	30.0	55.0	15.0	35.0	22.5	45.0
CODE 15	20.0	30.0	20.0	35.0	20.0	32.5
CODE 16	20.0	35.0	20.0	35.0	20.0	35.0
CODE 17		15.0		15.0		15.0

Conclusion: Findings to go forward to Schedule 1C.

Activities

- Code 11- Preparing for the evaluation
- Code 12- Goals and objectives conference with instructor
- Code 13- Pre-observation conference with instructor
- Code 14- Classroom observation of instructor
- Code 15- Post-observation conference with instructor
- Code 16- Final conference with instructor
- Code 17- District reporting

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives

Schedule 5
Carlsbad Unified School District
498/83 Stull Act
Fiscal Year: 2007-2008
Permanent Time Study

Source: SA1.7-C Permanent Timesheets.

Purpose: To calculate time spent by "Various Principals and Vice Principals" on Stull Act.

Findings:

C D 10 10 10 10 10 10 10 10 10 10 10 10 10										*Activity Codes	ity C	odes					
Schoolsite Staff A B C D D D D D				1	1			12		-		13		L		4	
Caks Elementary Kimberty Ann Huesing 30 30 30 25 25 25 25 25 25 25 25 25 25 25 25 25 25 25 25 20 20 20 20 10	Schoolsite	Staff	4	В	ပ	Ω	4	Ш	ပ	_	L	┝	L	A	1	1	٥
Carcolyn Millikin Savid Kalk Savid Kal	Aviara Oaks Elementary	Kimberly Ann Huesing	30	30	30	30	25	25	-	╀	H	╀	-	+-	**115	**115	**115
Pavid Kalk 5 5 5 10 <t< td=""><td>Aviara Oaks Middle</td><td>Carolyn Millikin</td><td>٠¢.</td><td>20</td><td>20</td><td>20</td><td>10</td><td>5</td><td></td><td>10</td><td></td><td></td><td>╀</td><td></td><td>15</td><td>15</td><td>7</td></t<>	Aviara Oaks Middle	Carolyn Millikin	٠¢.	20	20	20	10	5		10			╀		15	15	7
Para Hills Elementary Leslie Harden 10 15		David Kalk	5	5	5	ıÇ.	9	-		L	-	-	 	-	2	2 2	2 4
Para Hills Middle Catina Hancock 20 20 20 5 5 5 6 45	Calavera Hills Elementary	Leslie Harden		5	-		15	15	-	_	F	-	-	-	5	15	5
Adalley Academy Reith Holley Keith Holley 15 16 10	Calavera Hills Middle	Catina Hancock	20	20	20	20	ıC	5	5	5		}	-	45	45	45	45
And High Bill Lord 15 15 15 60	Carlsbad Valley Academy	Keith Holley	15	15			15	15		7		_	_	20	99	30	30
Marjorie Giordani 15 15 15 15 16 17 18 18 18 18 18 18 18 18 18 18	Carlsbad High	Bill Lord	15				15			7	10		-	09			
Sich Tubbs 10		Marjorie Giordani	15				15	-		7	100			**240			
Sich Tubbs 10		Tom Bloomquist	10				5			7			-	**120			
Son Carol Van Vooren 10	Hope	Rich Tubbs	10				2	5	5	-	-	-	L	5	10	10	ıc
Rim Robert Devich 10	Jefferson	Carol Van Vooren					10	10		5			ŀ				
Nobert Devich Steve Ahle Steve Ah	Kelly	Theresa Armstrong	10	10	10	10	10	10		_			İ	9	10	10	10
Steve Ahle 13 13 13 13 13 19 9 9 9 9 9 9 9 9	Pacific Rim	Robert Devich				30				00	-		8				30
d Lund **300 **300 **300 **750	Poinsetta	Steve Ahle	13	13	13	13	6	6					_	6	တ	6	6
d Lund	Valley Middle	Julio Cesar Morales					15		-		-	-	L	_	12	12	12
14 15 16 18 12 12 11 15 17 16 16 20 19 18 18 32 32 23 33		Chad Lund	**300	**300	**300	_					_				009**	009**	009**
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14 30 12 20 15 30 15	Summation of criteria B a	nd C		3		<u> </u>	¦ 	23	; }	<u> </u> -	 	33	ļ	<u> </u>	1		
	Averages to be used		14	ñ		'	12	20		1		30		15		5	

Conclusion: Findings will go forward to Schedule 1CC.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor Code 16- Final conference with instructor

Code 17- District reporting

Evaluation Criteria

(A) District standards and test results

(B) Instructional techniques/strategies

(C) Adherence to curricular objectives

(D) Suitable learning environment

**Times were not used to calculate averages

Carlsbad Unified School District Fiscal Year: 2007-2008 Permanent Time Study 498/83 Stull Act Schedule 5

Purpose: To calculate time spent by "Various Principals and Vice Principals" on Stull Act. Source: SA1.7-C Permanent Timesheets. Findings:

, '					***	*	*Activity Codes	Cod	es				
			1	15			-	16				17	-
Schoolsite	Staff	A	В	ပ	Ω	A	m	ပ	0	4	æ	ပ	_
Aviara Oaks Elementary	Kimberly Ann Huesing	75	75	75	75	75	75	75	75	75	75	75	75
Aviara Oaks Middle	Carolyn Millikin		10	10	10		10	10	2		2	2	7
	David Kalk	10	10	10	10	10	20	20	9	5	5	5	5
Calavera Hills Elementary	Leslie Harden	5	10	10	5	5	10	10	2		30		
Calavera Hills Middle	Catina Hancock					20	20	20	20	5	5	2	ιΩ
Carlsbad Valley Academy	Keith Holley	20	20	20	-	19	9	19		15			
Carlsbad High	Bill Lord	30		!		30							
	Marjorie Giordani	30				30							
	Tom Bloomquist	20				20							
Hope	Rich Tubbs	5	10	15	5	5	ιΩ	10	5	22	2	5	5
Jefferson	Carol Van Vooren					10	10	10	5	5	5	5	5
Kelly	Theresa Armstrong	10	9	9	9	10	10	10	10	5	2	5	5
Pacific Rim	Robert Devich				30				99				
Poinsetta	Steve Ahle	6	6	6	6	_							
Valley Middle	Julio Cesar Morales	12	12	12	12	18	18	18	18				
	Chad Lund	**450	**450	**450 **450 **450 **450 **300	**450	**300	**300	**300	**300	**300 **300 **300 **300	**300	**300 **300	**300
Averages		21	18	19	18	20	19	19	13	16	1	15	15
Summation of criteria B and C	ld C		'n	37		; 	38) 	[i -	19	 	1
Averages to be used		20	35	,	· '	50	35			İ	15	1	

Conclusion: Findings will go forward to Schedule 1CC.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor Code 16- Final conference with instructor

Code 17- District reporting

Evaluation Criteria

Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives Criteria A - district standards and test results Criteria D - suitable learning environment **Times.were not used to calculate averages

498/83 The Stull Act (K-12)

District/C Employee	herly Husin	S Exact Po		<u>xal</u>		<i></i>		
Telephon		<u>h/hrly</u> Fiscal Yea circle) Circle the ye			07-08	,		
Code 11 P Code 12 G Code 13 P Code 14 C Code 15 P Code 16 Fi	le Activities Codes: reparing for the evaluation oals and objectives conference with re-observation conference with inst lassroom observation of instructor ost-observation conference with ins nal conference with instructor strict reporting	(A) h instructor (B) ructor (C)	luation Crite district stan instructiona adherence suitable lea	idards ai il technic to curric irning en	ques/stra cular obje ovironme	ategies ectives ent		ēach
Allocate the	average time spent on each criteric following evaluation steps:	on (A-D) for	1 '	erage Tir			7.	
- Caon of the	ionowing evaluation steps:		A	В	С	D	1	:
Code 11	Preparing for the evaluation		30	30	30	30		•
Code 12	Goals and objectives conference	with instructor	25	25	25	25		
Code 13	Pre-observation conference with	instructor	75	75	75	75	†	
Code 14	Classroom observation of instruct	or	115	115	115	115		
Code 15	Post-observation conference with	instructor	75	75	75	75		.•
Code 16	Final conference with instructor		75	75	75	75	-	
Code 17	District Reporting		75	75	75	75	· : -	
ou have repor eriurv under ti	ERTIFICATION: The State of California nandates in order for the district to received actual data or have provided a goone laws of the State of California to be his information is used for cost accounts.	od faith estimate which you	r signature of ou "certify (or n your perso ASE USE B	n this for declare)	m certifie under pe	s that	•	• .
_	questions, please contact		Date[(2/14/	08			

Routine Evaluations of Instructors - PERMANENT

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/Co		Adm				
		Department/	Locatio	n		
Employee	John Hillitin					
Linbioyee	rivaine	Exact Position	n Title			
Telephon	2 12mo/11mo/10mo/hriv Work year length(circle)	Fiscal Year: Circle the years	05-06 for whic		07-08 e respor	nding.
Reimbursab	le Activities Codes:	Evaluat	on Crite	ria:		
Code 12 G Code 13 Pr Code 14 Cl Code 15 Pc Code 16 Fi	reparing for the evaluation oals and objectives conference with instructor e-observation conference with instructor assroom observation of instructor ost-observation conference with instructor nal conference with instructor strict reporting CLASS	tor (B) instr (C) adh (D) suita	rict stand ructional erence t able lear	techniq o curric ning en	ues/stra ular obje vironme	itegies ectives nt
Allocate the	average time spent on each criterion (A-D) f	ROOM TEACHER		rage Tir		
each of the	following evaluation steps:		A	B	 	1
Code 11	December 5 at 1		_ A	В	C.	D
	Preparing for the evaluation			2	20	20
Code 12	Goals and objectives conference with instr	uctor	10	10	10	10
Code 13	Pre-observation conference with instructor			10	10	10
Code 14	Classroom observation of instructor		·	15	15	15
Code 15	Post-observation conference with instructo	r		10	10	10
Code 16	Final conference with instructor			10	10	10
Code 17	District Reporting		-	7	<i>J</i> -	1
MPI OVEE O	EDTICICATION TIL OUT TO THE					
ou have repor erjury under t	ERTIFICATION: The State of California requires nandates in order for the district to receive reimited actual data or have provided a good faith exhet laws of the State of California to be true and this information is used for cost accounting our	stimate which your sig	nature o certify (or	n this for declare)	m certifie under pe	s that

2 Hours

If you have any questions, please contact __ PLEASE SUBMIT THIS INFORMATION BY

Employee Signature

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12) Routine Evaluations of Instructors - PERMANENT

Please report below the average amount of tin the reimbursable activities for the mandated pr	ne spent (in minutes	s) by yo	u to imp	olement	each o	ř
[MUSback-USI]	ogram. TH	ala	_ Da	ls	MI	da
District/COE Daniel Kalk	Department/	Locatio	on .	er)	al	
Employee Name	Exact Position	n Title				
Telephone # 12mo/11mo/10mo/hrly Work year length(circle	Fiscal Year: Circle the years	05-06 for whic		07-08 e respon	ıding.	
1	(A) distructor (B) instr r (C) adh (D) suit or	ructional erence t able lear	dards and techniq to curricu ning env	id test re ues/stra ular obje vironmer	tegies ctives nt	=
Allocate the average time spent on each criterion (A-each of the following evaluation steps:	D) for	Ave	rage Tin	ne in Min	utes	
		Α	В	С	D]
Code 11 Preparing for the evaluation		5	5	5	5	
Code 12 Goals and objectives conference with i	nstructor	10	10	10	10	
Code 13 Pre-observation conference with instru	ctor	10	10	10	10	
Code 14 Classroom observation of instructor		5	20	20	5	
Code 15 Post-observation conference with instru	ıctor	10.	10	10	10	
Code 16 Final conference with instructor		10	20	20	(0	
Code 17 District Reporting		5	5	5	5	
EMPLOYEE CERTIFICATION: The State of California requidata for state mandates in order for the district to receive now have reported actual data or have provided a good fait perjury under the laws of the State of California to be true and information." This information is used for cost accounting perputyee Signature Employee Signature YULEASE SUBMIT THIS INFORMATION BY	eimbursement. Your sig th estimate which you "o and correct based on yo ourposes only. PLEASi	nature o certify (or our perso E USE BI Date , at	n this fon declare) nal know LUE INK	n certifie		

498/83 The Stull Act (K-12)

	Please the reim	report below the average amount of time spent (in minutes bursable activities for the mandated program.	s) by yo	u to imp	lement	each of
		CIRSO) CAM				.*.
	District	COE Department/	ocatio	n ·	-	
	رسا	Havaer Dr.	\sim $^{\wedge}$			
	Employ	ee Name Exact Positio	h Tifle		روال	
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_	Teleph	Spo # 14/- dla - S 1// 1// 1// S	05-06	06-07	(I)
		on circle the years	TOF WRIC	n you are	е сезвол	ding.
٠,	Reimburs	able Activities Codes: Evaluati	on Crite	ria:		
	Code 12	Preparing for the evaluation Goals and objectives conference with instructor (B) instructor	ict stand	dards an	d test re	sults
	Code 13	The of the state o	uctional erence t	techniqu	ues/stra	tegies
	Code 14	Classroom observation of instructor (D) suits	able lear	nina env	нан орје ⁄ironmer	cuves nt
	Code 15	Post-observation conference with instructor Final conference with instructor		g		
	Code 17		TIME 10	NOT 5-1		
	1	District reporting CLASSROOM TEACHER the average time spent on each criterion (A-D) for				
·	each of ti	ne following evaluation steps:	Ave	rage Tim	e in Min	utes
	·		Α	В	С	D
	Code 11	Preparing for the evaluation		10		
	Code 12	Goals and objectives conference with instructor	15	7		
	Code 13	Pre-observation conference with instructor	ŕ	7	. 5	
	Code 14	Classroom observation of instructor	5	15	15	
	Code 15	Post-observation conference with instructor	5	10	10	5
	Code 16	Final conference with instructor	5	10	6	5
1	Code 17	District Reporting		2-80	- h_	
L			1.	J)		
=	MPI OVEE	CERTIFICATION TO CO.				
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E	mployee S	ignature / // At a V	ate		i ()	78
		any questions, please contact		1-1/		$\sim_{\mathcal{O}}$
		BMIT THIS INFORMATION BY; TO		<u> </u>		·

)	Routine Evaluations of Instructors - PI	ERMA	NEN'	Τ	
Please reimi	report below the <i>average</i> amount of time spent (in minus bursable activities for the mandated program. COE Department	45		plemen	t each
- A -	ee Name Exact Posi	100 Ville	46		
	12mo/f11mo/10mo/hrly Fiscal Year:	05-06	í. Be na	2 07 00	\ .
Telepho	ne # Work year length(circle) Circle the yea			7 (07-08 re lespo	
Code 11 Code 12 Code 13 Code 14 Code 15 Code 16 Code 17	Goals and objectives conference with instructor Pre-observation conference with instructor Classroom observation of instructor Post-observation conference with instructor Post-observation conference with instructor Final conference with instructor District reporting (A) di (B) in (C) at (C) at (D) st (D) st (D) st (D) st (D) st (EASSROOM TEACHE	ation Crite strict star structiona dherence uitable lea R TIME IS	idards ai il technic to curric iming en	iues/stra ular obje vironme	itegies ectives nt
each of th	he average time spent on each criterion (A-D) for e following evaluation steps:	Av	erage Tir	ne in Mii	utes
Code 11		A	В	С	D
	Preparing for the evaluation	120	20	20	20
Code 12	Goals and objectives conference with instructor	5	5	5	5
Code 13	Pre-observation conference with instructor	0	0	0	0
Code 14	Classroom observation of instructor	45	45	45	45
Code 15	Post-observation conference with instructor	0	0	0	0
Code 16	Final conference with instructor	20	20	20	20
Code 17	District Reporting	5	5	5	5
EMPLOYEE	CERTIFICATION: The State of California requires that school district to receive reimburgers (of persons	el mainte	in o	
you have rep	e mandates in order for the district to receive reimbursement. Your sorted actual data or have provided a good faith estimate which your the laws of the State of California to be true and correct based on This information is used for cost accounting purposes only. PLEA	ignature o "certify (or	n this for declare)	n certifie	s that
Employee Sig	gnature	Date	10/1/2	108	
	ny questions, please contact	_ , at	1,6	· · · · · · · · · · · · · · · · · · ·	
LEWSE SOF	BMIT THIS INFORMATION BY; TO				

498/83 The Stull Act (K-12)

Please repo	t below the average amou able activities for the mand	ant of time spe	ent (in minute	s) by yo	u to im	plemen	t each
District/COI			 C√A Department/	Location	on	-	
Employee N	Jame Holloy 12mp/11mo/10		Exact Position	on Title		<u> </u>	<u> </u>
Telephone		11 / 1	Fiscal Year: Circle the years	05-06 for whice		07-08 e respor) nding.
Code 11 Prep Code 12 Goal Code 13 Pre- Code 14 Clast Code 15 Posi	Activities Codes: paring for the evaluation is and objectives conference observation conference with sroom observation of instruc- observation conference with conference with instructor ict reporting	instructor tor instructor	(A) dist (B) inst (C) adh	ion Crite rict stan ructiona erence able lea	dards ar I technic to curric ming en	iues/stra ular obje vironme	itegies ectives nt
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Code 11	Preparing for the evaluation			15	15		
Code 12	Goals and objectives confere	nce with instruct	or .	15	15		
Code 13	Pre-observation conference	vith instructor		15			
Code 14	Classroom observation of ins	tructor		20	30	30	30
Code 15	Post-observation conference	with instructor		20	20	20	
Code 16	Final conference with instruct	or		10	10	0	
Code 17	District Reporting			15			
EMPLOYEE CER	TIFICATION: The State of Calif	omia requires th	at cobool distant				
you have reported perjury under the information." This	d actual data or have provided a laws of the State of California to information is used for cost ac	good faith estin	sement. Your signate which you "	nature o certify (or	n this for declare)	m certifie	s that
Employee Signati		Y11 (Date	D-15-	06	.
	restions, please contact THIS INFORMATION BY	Keith H		, at	531-5	1200	

498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - PERMANENT

	Routine Evaluations of it	rstructors	- PEr	KIVIA	NENI		
Please rep	ort below the average amount of tin	ne spent (in ogram.	minutes	s) by you	u to imp	lement	each of
District/CC	SED	Depa	rtment/	ocatio	C+15	<u> </u>	
Employee	Name Cons	Exact	<u> SS I.</u> Positio	s+ n Title	Priv	1016	J.
<u> 260) 33।</u> Telephone	5/97 12mo/11mo/10mo/hrly e # Work year length(circle	•	Year: he years) ding.
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Code 12	Goals and objectives conference with	instructor		15			
Code 13	Pre-observation conference with instru	ctor		15			
Code 14	Classroom observation of instructor			60		·	
Code 15	Post-observation conforms with inst-						

EMPLOYEE CERTIFICATION: The State of California requires that school district	
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Employee Signature	Date <u>(0/</u> 3/00
If you have any questions, please contact	, at
PLEASE SUBMIT THIS INFORMATION BY; TO;	
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Final conference with instructor

District Reporting

Code 16

Code 17

498/83 The Stull Act (K-12)

District/CO // Employee 60)33/ Telephone	Name -5/98 12mok11mok Work year ler	Departure Departure Exact Departure	artment/lest Position I Year: the years	n Title	06-07	Uni		L
Code 11 Proceeds of the Process of t	le Activities Codes: reparing for the evaluation coals and objectives conference re-observation conference with assroom observation of instructor conference with instructor strict reporting	th instructor uctor ith instructor	(A) distr (B) instr (C) adh (D) suita		dards an techniqu o curricu ning env	ues/stra ilar obje vironmer	tegies ctives nt	
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· ·	following evaluation steps:		•	Α	В	С	D	
Code 11	Preparing for the evaluation	n		15	-			
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ode 13	Pre-observation conference	e with instructor		15				
ode 14	Classroom observation of i	nstructor		4)——		State of the State	thrs
ode 15	Post-observation conference	ce with instructor		30		-		Proportin
ode 16	Final conference with instru	ıctor		30				
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have repor	ERTIFICATION: The State of Control of the district ted actual data or have provide the laws of the State of California this information is used for cost ature	d a good faith estimate w	nt. Your sig hich you "c ased on yo y. PLEASI	nature o ertify (or	n this fon declare) nal knowi .UE INK	n certifier under pe ledge or	s that enalty of	

498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - PERMANENT

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District/C	.02,	CIAS Department	ocatio	adn	, n	 -
10 m Employee		ASSISTA Exact Position	ent	Pr	יחנין	ol
Telephone	12mg/11mg/40mg/hrly Work year length(circle)	Fiscal Year: Circle the years	05-06 for whic		07-08 e respon) ding.
Code 11 Pr Code 12 Gr Code 13 Pr Code 14 Cl Code 15 Pc Code 16 Fir Code 17 Dis		(A) districtor (B) instrictor (C) adh (D) suite	ructional erence i able lear	dards an techniq to curricu	ues/strat ılar obje /ironmer	tegies ctives nt
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Code 12	Goals and objectives conference with ins	structor	<i>(</i> 2	linu	t.	
Code 13	Pre-observation conference with instruct	or .	10	un	tes	÷
Code 14	Classroom observation of instructor		2	ha	3	
Code 15	Post-observation conference with instruc	tor	20	Mou	15	
Code 16	Final conference with instructor		25	mi	utes	
Code 17	District Reporting					
EMPLOYEE C	ERTIFICATION: The State of California requir	es that school district	Domos	ol moint	in	
you have report perjury under the information." T	rted actual data or have provided a good faith he laws of the State of California to be true an his information is used for cost accounting pu	moursement. Your sig estimate which you "o of correct based on your poses only. PLEAS!	inature o certify (or our perso E USE Bl	n this fon declare) nal know UE INK	n certifie: under pe	
Employee Sign	nature		Date	1206	100	
	questions, please contact					
PLEASE SUBN	MIT THIS INFORMATION BY	; TO				·

Ine reimbursa	below the average amount of time spent (in minuble activities for the mandated program.	tes) by yo	u to im	olemen	t each o
District/COE	Ishad	-			
Rid	Department Prince	pal			
Employee Na	ame Exact Posi	tion Title			-
33(5900 Telephone #	Work year length(circle) Fiscal Year Circle the year			07-08 e r e spor	
Code 12 Goals Code 13 Pre-oi Code 14 Class Code 15 Post-o	aring for the evaluation and objectives conference with instructor bservation conference with instructor room observation of instructor observation conference with instructor conference with instructor conference with instructor	uation Crite listrict stan histructiona hidherence uitable lea	dards ar I technic to curric rning en	jues/stra ular obje vironme	ategies ectives nt
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each of the folio	owing evaluation steps:	A	В	С	D
Code 11	Preparing for the evaluation	10			
Code 12	Goals and objectives conference with instructor	5	5	5	5
Code 13	Pre-observation conference with instructor	5	5	5	5
Code 14	Classroom observation of instructor	5	10	10	5
Code 15	Post-observation conference with instructor	5	10	15	5
Code 16	Final conference with instructor	5	5	10	5
Code 17	District Reporting	5	5	5	5
ou have reported erjury under the land formation." This imployee Signatur		signature of the signat	on this for r declare onal know SLUE INK 7-2-7	m certifie) under p viedge or -08	es that enalty of
you have any que	estions, please contact	, at			
02 000,,,,	THIS INFORMATION BY; TO;				

498/83 The Stull Act (K-12)

District/Control Carel Employee (760) 331- Telephone	Name SS99 12mo/11mo/10mo/hrly Work year length(circle)	Department	Sov Location on Title	on 06-0(07-08)	
Code 11 Pr Code 12 G	Reimbursable Activities Codes: Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Prophere view of the evaluation (B) instructional techniques/strategies						
Code 14 Cl Code 15 Pc Code 16 Fir	e-observation conference with instructor assroom observation of instructor ast-observation conference with instructor all conference with instructor strict reporting CLAS	(C) adh	erence able lea	to curric ming en	ular obje vironme	ectives nt	
Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:			Average Time in Minutes				
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Code 11	Preparing for the evaluation						
Code 12	Goals and objectives conference with ins	tructor	10	10	10	5	
Code 13	Pre-observation conference with instructor	r					
Code 14	Classmom observation of instructor			•			
Code 15	Post-observation conference with instruct	or		-	-		
Code 16	Final conference with instructor		10	10	10	5	
Code 17	District Reporting		5	5	5	5	
you have report perjury under th information." TI Employee Signa f you have any		estimate which you so estimate which you so correct based on you poses only, PLEASI	pnature of certify (or pur perso E USE Bl	n this for declare) nal know	m certifie under pe ledge or	s that	
	THE IN CHANTION DI	:10					

498/83 The Stull Act (K-12)

Please repo	ort below the <i>average</i> a sable activities for the n	mount of time s	pent (in minute	s) by yo	u to imp	iement	each o	
Cu	(S.)	: :	Ke	lles				
District/CC)E 1 .	•	Department	Ocatic	n			
TROSS	e Armstro	ng	_ PRV	neco	al)		
Employee	· _ ·	() -	Exact Position	on Title				
760 33	3/ 58/10 12mo/11mg	10mo/hrly	Fiscal Year:	05-06	06-07	7-08	١.	
Telephone	# Work year l	ength(circle)	Circle the years	for whic	h you an	respon	ding.	
Reimbursable	Activities Codes:		Evalue	tion Crite				
Code 11 Pre	eparing for the evaluation	•		trict stand		d toot se		
Code 12 Go	als and objectives confere	ence with instruct	Dr (R) inst	tructional	technic	u test te	togion	
Code 13 Pre	e-observation conference	with instructor	\ / '	nerence t	o curricu	ues/sua var obio	eti es	
Code 14 Cla	assroom observation of ins	structor	(D) sui	table lear	ning an	ironmor	cuves	
Code 15 Pos	st-observation conference	with instructor	(2) 04	idbic icai	riing env	, ii Oi iii lei	π.	
Code 16 Fin	al conference with instruc	tor				-		
Code 17 Dis	trict reporting	CLASS	ROOM TEACHER	TIME IS	NOT REI	MBLIRS	ED:	
Allocate the average time spent on each criterion (A-D) for				Average Time in Minutes				
each of the h	ollowing evaluation steps:			Α	В	С	D	
Code 11	Preparing for the evalua	tion		10			->	
Code 12	Goals and objectives co	nference with instru	uctor	10			0	
Code 13	Pre-observation confere	nce with instructor	٠.	5	45,111,000	Personal Company of the Company of t	->	
Code 14	Classroom observation o	of instructor		10			7	
Code 15	Post-observation confere	ence with instructor		10	yerlande	CONTRACTOR OF THE PROPERTY OF	7	
Code 16	Final conference with ins	tructor	-	10			~~	
Code 17	District Reporting	•		5			->	
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ou have report erjury under th formation." The mployee Signa you have any	ERTIFICATION: The State of candates in order for the districted actual data or have provide laws of the State of Californis information is used for contact	died a good faith es nia to be true and o st accounting purp	oursement. Your si firmate which you " correct based on y oses only. PLEAS	gnature of certify (or cour perso E USE Bl Date	n this for declare)	n certifie		
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Please report below the average amount of time spent (in minutes	s) by you	u to imp	lement	each of	
and reimbulsable activities for the mandated program.	1,0	P.	•	`	
District/COE	fice	_ /l	M	<i>)</i>	
Department Department	Locatio	^{'n} ()			
Employee Name Exact Positio	n Title				
92/1000	ir riio		,		
TEMOT TIMO TOMOTHY FISCAL YEAR:	05-06	06-07	07-08)	
Telephone # Work year length(circle) Circle the years	for whic	h you are	erespon	ding.	
Reimbursable Activities Codes: Evaluati			<u> </u>		
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Code 40 Code 1 11 11 11	rict stand	lards an	d test re	sults	
Code 13 Pre-observation conference with instructor (C) adherence w	uctional	techniqu	Jes/stra	tegies	
Code 14 Classroom observation of instructor (D) suits	ahle lear	nina env	ilar obje:	Clives	
Code 15 Post-observation conference with instructor	abic icai	imig city	Worminel	ι.	
Code 16 Final conference with instructor		•			
Code 17 District reporting CLASSROOM TEACHER	TIME IS	NOT REI	MBURSE	≣D.	
Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:	Average Time in Minutes				
	Α	В	.0	D	
Code 11 Preparing for the evaluation				30	
Code 12 Goals and objectives conference with instructor				60	
Code 13 Pre-observation conference with instructor				30	
Code 14 Classroom observation of instructor				30	
Code 15 Post-observation conference with instructor					
				30	
Code 16 Final conference with instructor				30	
Code 17 District Reporting					
			!		
MPLOYEE CERTIFICATION: The State of California requires that school district ata for state mandates in order for the district to receive reimbursement. Your sig ou have reported actual data or have provided a good faith estimate which you "cerjury under the laws of the State of California to be true and correct based on your formation." This information is used for cost/accounting purposes only. PLEASE	nature or ertify (or	this form declare)	n certifies under pe edge or	s that naity of	
	ate /	ケーノ	6-0) X	
you have any questions, please contact			<u> </u>		
LEASE SUBMIT THIS INFORMATION BY; TO;					

Employee AVERAGE Time Record for Mandated Costs, 498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - PERMANENT

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District/C	OE .		Dens	rtmont	Lac I II			
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mployee	Name	 .	Even		•			
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<i>3/-65</i> 5 Telephon	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	/10mo/hrly	Fiscal	Year:	05-06	06-07	(07-08)
i elebijoti	e# Work year I	ength(circle)	Circle	he years	for whic			
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inde 14 Cl	re-observation conference vassroom observation of ins	with instructor	:	(C) adh	erence t	o curric	ular obie	ctives
ode 15 Po	ost-observation conference	with instructor		(D) suit	able lear	rning en	vironme	nt 🕝
ode 16 Fil	nal conference with instruct	for	•				•	
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ode 12	Goals and objectives con	nference with inst	ructer		9	9.	(3	0
ode 13	Pre-observation conferen	nce with instructor	r		9	9	9	9
ode 14	Classroom observation o	f instructor			9	9	9	9
ode 15	Post-observation confere	nce with instructo	or .		9	9	9	9
ode 16	Final conference with inst	tructor					•	
ode 17	District Reporting							
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oloyee Sign		er according brut	oses only	PLEASE	E USE BL	UE INK	_	•
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UL DOVO GREE	Directions placed contect	. .		,		-	_	

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - PERMANENT

T) (
Please re	port below the average amount of ursable activities for the mandated	time spen	t (in minut	es) by y	ou to in	noleme	nt eac
THE LOUISING	ursable activities for the mandated	program.	,	11			000
-	(Colstal USD)		1/2/	Vo	110	-	
District/C	OE	D	epartmen	t/Locat	ion		
	1 Pina Marilac	-		gucai	yon		
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		ole) Cir	cle the year	s for whi	ich you a	re respo	onding.
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Code 11 P	reparing for the evaluation			ation Crit			
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Code 13 P	re-observation conference with instruc-	tor	(C) ad	truction: herence	to curri	ques/str	ategie:
Code 14 C	lassroom observation of instructor		(D) su	itable lea	rning e	viconm	ectives
Code 15 P	ost-observation conference with instruc	ctor	(=) 54			ALCHU	31 I(· .
Code 17 D	inal conference with instructor istrict reporting						
		LASSROO	M TEACHE	TIME IS	NOT RE	EIMBURS	SED
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	The second second second first	uctor		12	12	12	1/2
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	Classroom observation of instructor		,		1	1	
			·	12	1/2	12	12
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rade II	District Reporting						}
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Employee A RAGE Time Record for Mandaed Costs 498/83 The Stull Act (K-12)

Routine Evaluations of Instructors - PERMANENT

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ine reimbursab	le activities for the r	mandated program.	it (iii minutes) by	you to implement eac	h of
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	on Titl	PRIN	<u> 194(</u>	
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	300	300	300	300
nat school district p	ersonne ature or	I UIIS TOIT	n a recor	d of sthat
rement. Your sign nate which you "ce rrect based on you es only. PLEASE Da	r persor USE BL	UE INK	eage or	
	Evalua (A) dist (A) dist (C) adr (D) suit ROOM TEACHER T	Evaluation Criv (A) district stan (B) instructions (C) adherence (D) suitable less ROOM TEACHER TIME IS A 366 Ctor 450 450 360 360 360	Evaluation Criteria: (A) district standards a Or (B) instructional technic (C) adherence to curric (D) suitable learning er ROOM TEACHER TIME IS NOT RE IS A B 300 300 Ctor ISO 450 450 450 450 450 450 450 450	(A) district standards and test (B) instructional techniques/str (C) adherence to curricular ob (D) suitable learning environm ROOM TEACHER TIME IS NOT REIMBURS A B C Average Time in Mi A B C 300 300 150 150 Cter 150 150 450 Cter 450 450 300 300 300 300 300 300 300 300 300

n ta	Training of E	valuators		
District/COE C	UZD	_ Fiscal Year:	07-08	
Type of Training Activity	Pont Intervice	CHS		
	00)	Training Location 1:00 pm F	0 3:00pm	
Date of Activity		Start and End Times		
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)	=
1 Emily Smith	Adm. Assist	CHS	Trainer Trainee	J per Shing
2 B, 11 -5 M. VA	Aset Principal	C. HS	Trainer Trainee	
3	·		Trainer Trainee	
4			Trainer Trainee	
5		·	Trainer Trainee	•
7			Trainer Trainee	
8			Trainer Trainee	
9		<u> </u>	Trainer Trainee	
10			Trainer Trainee	
			Trainer Trainee	
Provide a brief description of t	ne training curriculum or attac	h copy of agenda and materia	als:	
Brand Lantz				
The District training and it is	F 11.			
The District training coordinate				•
EMPLOYEE CERTIFICATION: The properties of the part of the pave reported actual data or have regionally under the laws of the State of t	provided a good faith estimate	which you "certify (or declare)	certifies that you under penalty of	
mployee Signature	a dodgoning purpose	es only. PLEASE USE BLUE I	NK / / is	
you have any questions, please	contact			
LEASE SUBMIT THIS INFORMA	TION BY	_; TO		
DPYRIGHT 2004 SixTen and Associates			Revised July 2007	

Employee Sign-in Record Sheet for Mandated Costs 498/83 The Stull Act (K-12)

•	Training of E	valuators	
District/COE	1SD	_ Fiscal Year:	01-08
Mandafed	Costs	CHS	
Type of Training Activity	y	Training Location	
	500 J	1:00 - 3:	ഹ
Date of Activity		Start and End Times	
			
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE	31 CODES 32
		WORK LOCATION	(circle one)
1 Tom Blomquis		c. CHS	Trainer (rainee
2 Cynthia Sims	admin. assist.	CHS	Trainer Trainee
			Trainer Trainee
4			Trainer Trainee
5		,	Trainer Trainee
6			Trainer Trainee
7			Trainer Trainee
8			Trainer Trainee
9 45.			Trainer Trainee
10			Trainer Trainee
Provide a brief description of t	he training curriculum or attac	h copy of agenda and materia	als:
The District training coordinate	or for this event, or another dis	triat and	
EMPLOYEE CERTIFICATION: TI	Other Committee dis	and employee, needs to sign	below.
EMPLOYEE CERTIFICATION: The or state mandates in order for the nave reported actual data or have	e State of California requires the district to receive reimbursement	nat school district personnel ma	intain a record of data
periury under the laws of the State	provided a good faith estimate	which you "certify (or declare)	under penalty of
mormation." This information is u	sed for cost accounting purpos	rect based on your personal kr sonly. PLEASE USE BLUE I	nowledge or . NK /
Imployee Signature	TO STATE	Date_	30/08
you have any questions, please		, at	
PLEASE SUBMIT THIS INFORMA	TION BY	; TO	
OPYRIGHT 2004 SixTen and Associates			
		•	Revised July 2007

1 .	Haifing of E	valuators	
District/COE (also	bad Unifeix	Fiscal Year:	2007-2008
Mondatel	God Unified Coots Dascrue	er CHS	10000
i you or iraining Activity	y	Training Location	
Hentent	W 2007	1:00 - 3:0) A
Date of Activity		Start and End Times	
			
DISTRICT EMPLOYEE	DISTRICT EMPLOYEE	Diornier	T
NAME (PRINT)	POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Marjorie Giora	lani Assistant PV		Trainer Trainer
2 Phull Cotteer	Alministrative	Non-to-t	
3	17011/11/13/14/11/VE	1735157 Wil	Trainer Trainee
	Ser.		Trainer Trainee
4			Trainer Trainee
5			Trainer Trainee
6			Trainer Trainee
7			Trainer Trainee
8		- A	Trainer Trainee
9			Trainer Trainee
10			Trainer Trainee
Provide a brief description of	the training curriculum or attac	ch copy of agenda and materia	als
Orbini -	essed oppms, s	ituations requ	red or
Submission.		·	
The District training coordinate	or for this event, or another dis	strict employee, needs to sign	below.
EMPLOYEE CERTIFICATION: TI for state mandates in order for the	ne State of California requires t	nat school district personnel mo	intoin a record of data
have reported actual data or have	provided a good foith anti	ent. Tour signature on this form	n certifies that you
perjury under the laws of the Statinformation." This information	e of California to be true and co	e wnich you "centry (or declare) эттест based on your personal k	under penalty of nowledge or
information." This information is	used tor cost accounting purpos	ses only. PLEASE USE BLUE I	NK
Employee Signature If you have any questions, please PLEASE SUBMIT THIS INFORMATION OF THE PROPERTY OF THE PR	contrat	Date _	10/2/2008
PLEASE SUBMIT THIS INFORMA	ATION BY	. TO	
		, IV	
COPYRIGHT 2004 SixTen and Associates			Revised July 2007

Employee Sign-in Record Sheet for Mandated Costs 498/83 The Stull Act (K-12)

1	Training of Ev	valuators	•
District/COE Car 1	s bad Unified	_ Fiscal Year:	2007-00
Training of Eva	alu Lax	Dist Office	
Type of Training Activity			
2-12-08	,	Training Location	
Date of Activity		3:00 - 4:	30
- TO TO TO THE STATE OF THE STA		Start and End Times	
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32
1 Devin Vodicka			(circle one)
2 Tressil Armstron		1 011102	Traine Trainee
3 Kimberly Huesing		Helly Elem	Trainer (rainee)
4 Catina Hancoch	Principal		Trainer Trainee
	Principal	CAM Elem.	Trainer (frainee)
5.J. Cesar Morales	ASST. Prinapal	Valley Middle	Trainer Trainee
6 Chel Lund	Asst Principal	Valley Middle	Trainer (rainee
7 Dave Kalk		A.D. Middle	Trainer Trainee
8 Inc Howard	'1 15 H	Calavera Middle	Trainer Trainee
9 10m Bloom gru	<u>5</u>	Carlsbal High	Trainer Trainee
10 Marjoru Giora		11	Trainer Trainee
Provide a brief description of	the training curriculum or attac	ch copy of agenda and materia	alr
CUSD Perfor	mance Evalua	tron System	Tiva
for first year	principals	tion System and assistant	- aiming
The District training coordinate	or for this event, or another di	strict employee, needs to sign	principal
EMPLOYEE CERTIFICATION T		surer employee, needs to sign	below.
EMPLOYEE CERTIFICATION: T for state mandates in order for th have reported actual data or have perjury under the laws of the Statinformation." This information is	e provided a good faith estimate	e which you "certify (or declare)	n certifies that you under penalty of
Employee Signature(X)	hidrely		10(14/08
If you have any questions, please		EL DEPARTMENT 7/2	10-33-5010
PLEASE SUBMIT THIS INFORM		CAMINO REAL	
COPYRIGHT 2004 SixTen and Associates	CARLSBA	AD,CA 92009	
2011 2001 Oiktell and Associates	•		Revised July 2007

498/83 The Stull Act (K-12) Routine Evaluations of Instructors DISTRICT STATISTICS REPORT

he following cost accounting statistics will assist the			
he following cost accounting statistics will assist the calculation of the distreport the required information in the spaces provided.	ict's reimbu	rsement.	Please
Certificated Instructors		Fiscal	Year
Statistical Data		06-07	07-08
A K-12 Probationary Teachers- Total Number	05-06	30 0.	85
B K-12 Permanent Teachers- Total Number	 		450
C K-12 Temporary Teachers- Total Number		:	30
D K-12 Classroom Teachers- A + B+ C = Total Number		·	565
A K-12 Probationary Teachers- Total Number Evaluated		3	85
B K-12 Permanent Teachers- Total Number Evaluated			225
C K-12 Temporary Teachers- Total Number Evaluated			30
D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated		. 7	340
K-12 Categorical/Grant Teachers- Total Number Evaluated			70
Reimbursable K-12 Evaluations- Line 2 D subtract Line 3			320
5.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant-funder Any state-federal-local grant-funder	C. 62002.5 S	ion State Categ	orical
PLOYEE CERTIFICATION: The State of California requires that school district pe state mandates in order for the district to receive reimbursement. Your signature of the reported actual data or have provided a good faith estimate which you "certify (country under the laws of the State of California to be true and correct based on your remation." This information is used for cost accounting purposes only. PLEASE U	rsonnel mair on this form o or declare) ur	ertifies tha ider penalt	rd of data t you y of
ployee Signature Date	e		
u have any questions, please contact/	5 +		31-502
ASE SUBMIT THIS INFORMATION BY CARLSBAD LINIFIED 5000 DISTR	PICT		
6225 EL CAMINO REAL CARLSBAD, CA 92009			

498/83 The Stull Act (K-12) Re-evaluations of Unsatisfactory Certificated Permanent Staff

DISTRICT STATISTICS District/COE: Carlsbal Unified	REPORT		
The following cost accounting statistics will assist the calculation report the required information in the spaces provided.	of the district's r	eimbursemer	ıt. Please
Statistical Data: Certificate Staff on Unsatisfactory Status		Fiscal Y	ear ear
	05-06	06-07	07-08
5 K-12 Permanent Instructors			
A. Number on unsatisfactory status			
B. Number of re-evaluations			0
			0
6 Permanent Non-Instructors:			
A. Number on unsatisfactory status		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	O
B. Number of re-evaluations			0
7 Reimbursable Re-evaluations 5 B + 6 B = Total			D:
Non-reimbursable re-evaluations (Do not include in the statistics above)			
 Any positions funded by these categoricals: 			
E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52176 LEP/Bilingual E.C. 52852 Coordinate E.C. 54425(b) Chapter 1 Federal compensatory education E.C. 54444.2 Migrant Children E.C. 54724 Drop-out Prevention E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 52065 Native American E.C. 52852 Coordinate E.C. 54724 Drop-out Prevention E.C. 54724 Drop-out Prevention E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 52065 Native American E.C. 52852 Coordinate E.C. 52652 Coordinate E.C. 54724 Drop-out Prevention E.C. 54724 Drop-out Prevention E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 52852 Coordinate E.C. 54724 Drop-out Prevention E.C. 54724 Drop-out Prevention E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 54724 Drop-out Prevention E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorical U.S.C. 25; 2604 Indian School Active American E.C. 62002.5 State Categorican E.C. 62002.5 State Categorican E.C. 62002.5 State	d Categorical		
 Any position that is grant-funded Re-evaluations of temporary and long-term substitute teachers. 			• •
EMPLOYEE CERTIFICATION: The State of California requires that school district mandates in order for the district to receive reimbursement. Your signature on the data or have provided a good faith estimate which you "certify (or declare) under California to be true and correct based on your personal knowledge or information burposes only. PLEASE USE BLUE INK Employee Signature Fyou have any questions, please contact PLEASE SUBMIT THIS INFORMATION BY PERSONN CARLSBAD UNIT	penalty of perjury ur on." This information	you have report inder the laws of is used for cost 10-3-08	ted actual the State of accounting
0225 EL	. CAIVIINO REAL	RICT	
OPYRIGHT 2004 SixTen and Associates CARLSE	BAD, CA 92009	_	

California Department of Education (CDE) - School Fiscal Services Division

Restricted Indirect Cost Rates for K-12 Local Educational Agencies (LEAs) - Five Year Listing ates approved based on standardized account code structure expenditure data

dress questions to sacsinfo@cde.ca.gov, or call 916-322-1770.

* Revised April 8, 2008

** C = C D = D	istrict		CA= Common Administration J = Joint Powers Agency	For	APP	ROVED	RATES	
				2004-05	dae with state a	no receral pro	grams, as allow	able, in:
County Code	LEA Code	.		2004-05	2005-06	2006-07	2007-08	2008-09
37	10371	Type*		(based on 2002-03 expenditure date)	(based on 2003-04 expenditure data)	(based on 2004-05 expenditure data)	(based on 2005-06	(based on 2006-0
37	67967	+ 5	San Diego County Superintendent	9.84%	8.54%		expanditure data)	expenditure data
37	67975	1 5	Alpine Union Elementary	3.50%	3.16%	8.22%	10.27%	9.76%
37	67983	1 5	Bonsall Union Elementary	4.54%	4.41%	2.99%	3.30%	3.27%
37	67991	1 - 1	Borrego Springs Unified	6.07%	8.52%	4.71%	4.05%	3.67%
37	68007	1 6	Cajon Valley Union Elementary	5.55%	7.46%	7.95%	5.36%	7.72%
37	68023		Cardiff Elementary	3.96%	4.44%	7.28%	5.98%	5.13%
37	68031	<u>P</u>	Chula Vista Elementary	5.36%	4.76%	3.82%	3.67%	3.83%
37	68049	<u> </u>	Coronado Unified	8.08%	6.29%	3.83%	3.54%	3.33%
37	68056	<u> </u>	Dehesa Elementary	7.45%		6.41%	3.97%	4.85%
37		D	Del Mar Union Elementary	5.42%	5.62%	5.92%	1.72%	3.86%
37	68080	D	Encinitas Union Elementary	6.33%	6.00%	2.98%	2.07%	4.80%
37	68098	D	Escondido Union Elementary	5.75%	5.04%	5.22%	5.19%	4.11%
37	68106	D	Escondido Union High	10.22%	4.97%	4.21%	4.80%	5.30%
37	68114	D .	Fallbrook Union Elementary	6.11%	8.07%	7.20%	8.03%	10.22%
	68122	D	Fallbrook Union High	14.4004	6.69%	5.76%	5.01%	8.03%
37	68130	D	Grossmont Union High	11.10%	10.32%	7.90%	8.00%	8.99%
37	68155	D	Jamui-Duizura Union Elementary	4.68%	5.70%	5.03%	3.19%	3.38%
37	68163	<u> </u>	Julian Union Elementary	1.28%	4.56%	5.43%	2.00%	3.08%
37	68171	_ D	Julian Union High	9.26%	6.16%	1.61%	2.70%	4.58%
37	68189	D	Lakeside Union Elementary	4.37%	5.35%	11.14%	7.97%	4.09%
37	68197	D	La Mesa-Spring Valley Elementary	8.91%	.7.63%	6.49%	6.84%	8.45%
37	68205	D	Lemon Grove Elementary	3.14%	3.64%	4.17%	2.92%	3.62%
37	68213	D	Mountain Empire Unified	11.53%	10.06%	9.47%	8.06%	6.96%
37	68221	D	National Elementary	6.20%	5.68%	6.57%	4.39%	
37	68296	D	Poway Unified	6.18%	5.85%	5.94%	6.41%	3.84% 6.07%
37	68304	D	Ramona City Unified	5.17%	5.19%	5.55%	4.95%	
37	68312	D	Rancho Santa Fe Elementary	6.62%	7.67%	6.74%	6.46%	4.23%
37	68338	D 5	San Diego Unified	8.29%	11.03%	9.99%	9.41%	6.52%
37	68346	D S	San Dieguito Union High	3.58%	5.83%	3.67%	4.64%	8.82%
37	68353	D S	San Pasqual Union Elementary	6.54%	7.45%	8.12%	6.12%	5.75%
37	68361	D 5	Santee Elementary	5.01%	5.82%	0.32%	0.29%	4.22%
37	68379	DS	San Ysidro Elementary	5.14%	7.06%	6.98%	6.46%	3.51%
37	68387	D 5	Solana Beach Elementary	4.89%	5.58%	5.94%	4.31%	7.44%
	68395	D S	outh Bay Union Elementary	8.15%	11.18%	9.01%	7.22%	7.09%
37	68403	DS	pencer Valley Elementary	6.11%	6.15%	6.90%		7.30%
37	68411	DS	weetwater Union High	15.10%	15.98%	12.57%	6.13% 2.01%	4.65%
	68437		allecitos Elementary	4.99%	4.63%	4.75%		1.63%
	68452		ista Unified	8.49%	3.65%	5.56%	5.37%	4.96%
	73551			4.57%	4.61%	3.61%	6.04%	8.07%
	73569		arlsbad Unified	5.73%	5.83%	6.48%	3.99%	4.65%
	73791	D S	ceanside Unified	4.53%	4.44%	4.32%	4.84%	6.18%
	75416		an Marcos Unified	4.07%	3.16%	3.74%	3.21%	2.84%
	75614		arner Unified	6.17%	7.42%		3.78%	3.61%
	JU 1-7	٧١٧:	alley Center-Pauma Unified	5,89%	7.98%	10.93%	7.73%	8.34%
					1.00/0	D 32% 1	5 820/	

6.32%

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n and Associates

MANDATE REIMBURSEMENT SERVICES

PRODUCTIVE HOURLY RATE UPDATE

Note: Please provide the rates for the FY: 07-08, and the missing rates for FY:06-07.

SCHOOL DISTRICT NAME:

Carlsbad Unified School District

Name		Fiscal	Fiscal Years:
	- Itle	06-07	
	AVERAGE ACCOUNTING TECHNICIAN	\$ 25.38	\$ 28.56
**	AVERAGE ADMINISTRATIVE ASSISTANT	\$ 26.22	\$ 31.22
Ċ	AVERAGE ADMINISTRATIVE SECRETARY	\$ 27.57	\$ 28.90
	AVERAGE CLERK (ALL CLERKS)	\$ 21.14	\$ 24.16
4 68 -1 2 2 2	AVERAGE COORDINATOR	\$ 25.86	\$ 34.62
207.95 +	AVERAGE COUNSELOR	\$ 60.48	
3. = (69.3104)666666 *	AVERAGE DIRECTOR	\$ 67.63	
\$ 207.95 *	AVERAGE GUIDANCE TECH	\$ 23.15	
	AVERAGE HEALTH TECH	\$ 23.10	
	AVERAGE INSTRUCTIONAL AIDE	i de la companya de l	
	AVERAGE OFFICE ASSISTANT		\$ 22.76
Do Anka, Hushing		\$ 18.66	\$ 22.06
المراجعة الم	AVERAGE PRINCIPAL	\$ 73.95	\$ 71.89
	AVERAGE PSYCHOLOGIST		
	AVERAGE REGISTRAR		

Six __n and Associates

MANDATE REIMBURSEMENT SERVICES

		Fisca	Fiscal Years:
Name	Title	20-90	07-08
	AVERAGE OFFICE ASSISTANT	\$ 18.66	€9
	AVERAGE PRINCIPAL	\$ 73.95	\$ 71.89
-	AVERAGE PSYCHOLOGIST	\$ 61.11	
	AVERAGE REGISTRAR		
	AVERAGE SECRETARY		
	AVERAGE SUBSTITUTE TEACHER	\$ 29.17	
Gordan Howard, Lund	AVERAGE VICE-PRINCIPAL	\$ 64.57	\$ 63.55
	SUBSTITUTE TEACHER (DAILY RATE WITH BENEFITS)	\$ 85.00	\$ 85.00
AAKER, CHARLES	DIRECTOR, FACILITIES	\$ 64.78	\$ 66.40
ADAMS, GWEN	TEACHER	\$ 60.21	\$ 65.81
AGRAMONTE, DENISE	ADMINISTRATIVE ASSISTANT	\$ 29.01	
AHLE, STEPHEN	PRINCIPAL (POINSETTIA)	\$ 76.21	\$ 71.23
ARMSTRONG, THERESA (TRESSIE)	ASSISTANT PRINCIPAL (KELLY ELEM)	\$ 56.80	\$ 60.76
ASHTON, BRIAN	COUNSELOR	\$ 62.21	\$ 60.09
BAIMA, LANE	PHYSICAL PERFORMANCE TEST COORDINATOR (TEACHER)	\$ 34.82	\$ 35.60
BEESON, JULIE	CAMPUS SUPERVISOR	LEFT DISTRICT	\$ 19.14
BLOOMQUIST, THOMAS	ASSISTANT PRINCIPAL	\$ 68.95	\$ 69.93
BOLING, JEAN MARIE	ADMINISTRATIVE SECRETARY	\$ 33.17	\$ 37.05
BOSS, VICTORIA	LIBRARY TECHNICIAN	\$ 19.83	\$ 25.68

2 of 10

Si ... and Associates

Name		Fisca	Fiscal Years	
	Title	06-07		
EVANS, AMY	OFFICE CLERK	LEFT DISTRICT	80-70	
FLANAGAN, MELODY	ATTENDANCE CLERK	\$ 20.34	, c	22 42
FORNELLI, LINDA	NURSE			2).7
FRAZIER, SUSAN	ACCOUNTANTING TECHNICIAN	TOTAL TELE	32	32.95
FREEMAN, GAYLEN	DEPUTY SUPERINTENDENT	LEFT DISTRICT		
GARCIA, ALICE	ADMINISTRATIVE SECRETARY	LET DISTRICT		
GEARING, HEATHER	ADMINISTRATIVE ASSISTANT			27.66
GEARING LINDS			\$ 27	27.00
כן יינוס) בוועסל	ACCOUNTING TECHNICIAN	\$ 24.16	\$ 28	28.33
GLENN, SUSAN	ADMINISTRATIVE SECRETARY	\$ 31.55		T
GOELTZ, КАТНҮ	PSYCHOLOGIST	\$ 50.41	€.	52.20
GONZALES, ALICE (JEAN)	ADMINISTRATIVE SECRETARY			2
GUNZELMAN, CATHY	OFFICE ASSISTANT			
HAINES DECHAIR 1110V		\$ 18.89	\$ 21.09	60
LOOP FOR THE PROPERTY OF THE P	DIRECTOR, CURRICULUM/INSTTUCTION		\$ 75.36	36
HANAGAN, MELODY				Τ
HANCOCK, CATINA	PRINCIPAL	\$ 61.91	\$ 65.03	3
HANSEN, JUDITH	ADMINISTRATIVE ASSISTANT	77 80		3 8
HANSEN, ROSE MARIE	ATTENDENCE CLERK	77:17		8
HANSEN, SUSAN	INSTRUCTIONAL AIDE	20.04	22.1.7	2
HARDEE, LESLIE	PRINCIPAL	60.00		- T

4 of 9

SixTen and Associates dl 12/10/2008

Si____and Associates

Name	Title		Fiscal Years:	l
HARPER, DONNA	DIRECTOR PURCHASING . STEE	20-90	07-08	П
HARTMAN, JANE		\$ 60.96	\$ 64.58	8
	COURDINATOR OF SPECIAL PROGRAMS	\$ 64.99	\$ 62.78	<u></u>
HETRICK, LINDY	ADMINISTRATIVE ASSISTANT	\$ 26.00	\$ 20.00	
HOLLEY, NORMAN /KEITH	COORDINATOR, ALT ED/PRINCIPAL	\$ 76.24		$\neg \neg$
HOWARD, TINA IRENE	ASSISTANT PRINCIPAL			2
JACKSON, DEBRA	ADMINISTRATIVE SECRETARY	FET DISTER	37.86	. 11
JENNINGS, DIANE	ADMINISTRATIVE ASSISTANT			
JIMENO, ALICE	ADMINISTRATIVE SECRETARY	30.80	\$ 29.78	
KAIK DAVE		\$ 26.00	\$ 30.50	
1,400	ASSISTANT PRINCIPAL	\$ 58.50	\$ 58.15	-
KRYZAK, JENNIFER	HEALTH TECHNICIAN	98.00		
KUHN, MARY	ADMINISTARTIVE SECRETARY CONFIDENTIAL		24.46	<u> </u>
ANE KIM		\$ 31.98	\$ 33.88	
COLUMN TO THE CO	HEALTH TECHNICIAN	\$ 24.15	\$ 28.32	
LARSON, JENNIFER	HEALTH TECHNICIAN	30, 70		·
LARSON, LESLIE	HEALTH TECHNICIAN	00.00		
LEWIS, RICK	TION SYSTEMS	08.1.30		
LORD IV, WILLIS (BILL)		00.00		
LUTZ, CINDY		08.95	\$ 66.60	
MADDOX, SHEILA		21.90	\$ 24.46	
	* NINCIPAL	72.58		
MARTINEZ, KERRY	STAR TESTING COORDINATOR	-		

I and Associates

Nome				
משוופ	Title		Fiscal Years:	
MARTINEZ, PAUL	MAINTENANCE WORKED	20-90	07-08	
McCORMAC, KATHRYN		\$ 34.85	\$ 38.93	3
McCORMICK LATIBA IEAN	LEAD ACCOUNTANT	\$ 37.14	\$ 41.30	0
NEAD COOK , TO THE	OFFICE ASSISTANT	\$ 17.99	\$ 24.38	
MERCHANT, SHARAN	IS SPECIALIST	37.05	. е	,
MILLIKIN, CAROLYN	PRINCIPAL (VALLEY MIDDLE)		38.93	<u></u>
MIRANDA, LOLA		\$ 76.21	\$ 73.61	
MONDERINE, ROSEMARY				
	SENIOR BUYER	\$ 32.38	50 00	Τ-
MORALES, JULIO CESAR	ASSISTANT PRINCIPAL			
MOYNAN, LINDA	STAR TESTING COORDINATOR	. wh	\$ 58.15	
NAVARRO, NANCY	DIRECTOR, FISCAL SERVICES			
NORTON, TORRIE	ASSISTANIT SIDEDINITIVIDIA :	76.21	\$ 80.72	
O'CONNEIL SIIZANNE	THE COLUMN ENDEN - PERSONNEL	\$ 94.20	\$ 90.99	
	ASSISTANT SUPERINTENDENT- INSTRUCTIONAL	\$ 94.20	\$	
OGAN, LAURA	ATTENDENCE CLERK			
OHLIN, EVANGELINE (VANGIE)	ADMINISTRATIVE SECRETARY		\$ 22.72	
PARKER, RACHEL	COUNSELOR	\$ 20.34	\$ 23.89	
PFRANG, SHARON	OFFICE ASSISTANIT		\$ 42.55	
PIERCE, ROBERT	TEACHTR	\$ 18.89		
PINNER ROBIN	אַטרטגין	\$ 61.86	\$ 59.75	
	ADMINISTRATIVE ASSISTANT	\$ 21.39	L C	
PRICE, JULIE	OFFICE ASSISTANT		60.02	
		17.99 \$	21.09	

SixTen and Associates dl 12/10/2008

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Si) and Associates

Name		Fisca	Fiscal Years:	
	lifle	06-07	04 00	
PULASKI, LINDA	ATTENDANCE CLERK	\$ 24.15	69	26.31
RAMOS, BARBARA	ATTENDANCE CLERK	\$ 23.55		2000
RAWLINGS, PHYLLIS	ADMINISTRATIVE SECRETARY		-	20.31
REDFIELD, JULIA	COUNSELOR	2	——	
REVIER, PATRICIA	GUIDANCE TECHNICIAN			58.43
REYNOLDS CATHERINE		\$ 25.35	€>	28.32
	ADMINIS I RATIVE ASSISTANT	\$ 24.18	€>	26.99
RIDHELD, JULIA				
ROBERTSON, CAROLYN	HEALTH TECHNICIAN	\$ 25.35	er.	20 00
ROSLUND, CYNTHIA	ADMINISTRATIVE ASSISTANT			20.92
RUBY, VICKI	GUIDANCE TECHNICIAN		→ €	20.34
SAGER, CARLYN (LYN)	TON ININA TELEBOOR	÷ 0.00	Ð	21.13
	S COLL ANALISI	\$ 36.59		_
SALVADORI, JEANNE	DISTRICT NURSE Left District 09/06	\$ 44.83		T
SAMANIEGO, SUSANNA	INSTRUCTIONAL ASSISTANT	\$ 20.82	645	24.43
SANCHEZ, PAULA	HEALTH TECHNICIAN			C+:+2
SANDHAGE, MARIA	OFFICE ASSISTANT			0 7
SANTAMARIA, ANDRES	ASSISTANT PRINCIPAL	FFT DISTRI		24.43
SCHROH, MELONY	COUNSELOR			
SETSER, PHYLLIS E.	ADMINISTRATIVE SECRETARY	04.03	e	56.35
SHINTO DEPLY		\$ 24.77	€	27.66
	ADMINISTRATIVE ASSISTANT	\$ 25.39	2	28.36

7 of 9

SixTen and Associates dl 12/10/2008

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Name	Title	- 1	Fiscal Years:	
SIMS, CYNTHIA	ADMINISTRATIVE SECRETABY	09-02		П
SMITH, CURTIS	PRINTING TECHNICIAN	\$ 24.77	\$ 27.66	99
SMITH EMELIA CERNILYS		\$ 30.07	33.59	- 69
OTTO (EMILY)	ADMINISTRATIVE SECRETARY	\$ 23.58	\$ 26.34	4
SI ANCHI, MARGARET	PRINCIPAL (CARLSBAD)	\$ 81.65	€-	7
STROPLE, MARIA	OFFICE ASSISTANT	£ 77 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	÷ 6	
SWEARINGEN, BARBARA	ADMINISTRATVE ASSISTANT		9 6	<u> </u>
SWEARINGEN, DOLORES	FOOD SERVICE WORKER	50.02 10.02 10.02 10.03		4
TALBOT, ALICE	ACCOUNTING TECHNICIAN	LEFT DISTRICT		
TEMPI TTO INCIDE		\$ 26.59	\$ 29.70	0
EMPLETON, WILLIAM LANCE	SKILL MAINTENANCE WORKER	\$ 33.19	37.07	\top
THOMPSON, TRUDY	ADMINISTRATIVE ASSISTANT	\$ 33.17	-	
TOKORCHE©K, JAN	DATABASE ADMINISTRATOR	-		5.
TROGDEN, ERIK	PRINCIPAL		44.07	
TDI IVAIM PERON		\$ 70.24		
LRUNAW, PEGGY	OFFICE ASSISTANT	\$ 19.83	\$ 22.15	7
TUBBS, RICHARD	PRINCIPAL (HOPE)	\$ 65.00	£ 79	
VAN VOOREN, CAROL	PRINCIPAL (PINE & JEFFERSON)			
VAN ZANT, STEVEN	PRINCIPAL	EET DICTER	73.61	- j-
VILLAMAR, OFELIA	OFFICE ASSISTANT	200		
VODICKA, DEVIN	DIRECTOR CHRRICH HWANETTHIĞTION	17.99	\$ 21.09	
WADE PATRICIA	NOTION	\$ 78.02	\$ 75.36	
	INSTRUCTIONAL AASSISTANT	\$ 18.89	\$ 21.09	
) : :	_

8 of 9

SixTen and Associates dl 12/10/2008

Fiscal Year

2006 - 2007

269

Six ien and Associates **Mandate Reimbursement Services**

KEITH B. PETERSEN, MPA, JD, President E-Mail: Kbpsixten@aol.com

Sacramento

3841 North Freeway Blvd., Suite 170 Sacramento, CA 95834 Claim File Copy

Telephone: (916) 565-6104

Fax: (916) 564-6103

San Diego 5252 Balboa Avenue, Suite 900 San Diego, CA 92117 Telephone: (858) 514-8605 Fax: (858) 514-8645

January 25, 2008

CERTIFIED MAIL # 7006 3450 0000 3941 8703

Ms. Virginia Brummels, Section Manager Local Reimbursement Section Division of Accounting and Reporting Office of the State Controller P.O. Box 942850 Sacramento, CA 94250

RE:

Annual Reimbursement Claims

Carlsbad Unified School District S37030

Dear Ms. Brummels:

Enclosed please find the original claims and extra copies of the FAM-27 for Carlsbad Unified School District's reimbursement claims listed below:

448/75	Consolidation of Annual Parent Notification,	
	Schoolsite Discipline Rules, Alternative Schools	2006-2007
1208/76	Pupil Health Screenings	2006-2007
100/81	Pupil Promotion and Retention	2006-2007
498/83	The Stull Act	2006-2007
589/97	Criminal Background Checks II	2006-2007

If you have any questions regarding these claims, please contact me at (858) 514-8605.

Sincerely,

Larry Hendee, Vice-President

Dobranvell

ixTen and Associatesئ

(38) Name of Contact Person for Claim

Assistant Superintendent, Business Services

Telephone Number:

(858) 514-8605

E-mail Address:

kbpsixten@aol.com

Type or Print Name

N 12/05

Program		MANDATE THE STU			•	,	FORM
260		CLAIM SI	•				SA-1
1)\	<u> </u>		(02) Type of Claim			IFi	iscal Year
arlsbad oried School District			Reimbursemer	nt X	1	2	006-2007
			Estimated]		
irect Costs			Object	Accounts			
3)	(a)	(b)	(c)	(d)	(e)		(f)
Reimbursable	Salaries	Materials	Contract	Fixed	Travel		
Components	and Benefits	and Supplies	Services	Assets	and Training		Total
Certificated Instructional Employees (CIE)	Claim Statistics:		evaluated per (03)	(A)(1) and (03)(A)(2	<u> </u>		380
1. Evaluate and assess performance	Ed. Code §4466	2, subd. (b), as a	mended by Ch. 49	98/83; Reimbursen	nent period begin	s fy 19	97-98
a. Review employee's techniques and strategies	\$ 45,248.19	\$ -	\$ -	\$ -	\$ -	\$	45,248.19
b. Evaluation to include assessment of techniques and strategies	\$ 61,805.44	\$ -	\$ -	\$	\$ -	\$	61,805.44
Evaluate and assess CIE who teach certain subjects	Ed. Code §4466	2, subd. (b), as a	mended by Ch. 4/	/99; Reimbursemei	nt period begins ()3/15/9)9
a. Review STAR results	\$ 21,053.21	\$ -	\$ -	\$ -	\$ -	\$	21,053.21
b. Assessment based on STAR results	\$ 29,876.50	\$ -	\$	\$ -	\$ -	\$	29,876.50
and NIE Employees	Claim Statistics:	Number of CIE's	and NIE's evaluate	ed per (03)(B)(1)	<u> </u>		
Evaluate and assess CIE and NIE employees	Ed. Code §4466	4, subd. (b), as a	mended by Ch. 49	98/83; Reimbursen	nent period begin	s fy 19	97-98
a. Evaluating and assessing CIE according to certain criteria	\$ -	\$ -	\$ -	\$ -	\$ -	\$	<u> </u>
b. Reducing evaluation to writing	\$ -	\$ -	\$ -	\$ -	\$ -	\$	<u> </u>
c. Transmitting evaluation to CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$	
d. Attaching response to personnel file	\$ -	\$ -	\$ -	\$ -	\$ -	\$	- '
e. Discussing evaluation with CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$	-
) Total Direct Costs	\$ 157,983.34	\$ -	\$ -	\$ -	\$ -	\$	157,983.34
lirect Costs				· .	· · · · · · · · · · · · · · · · · · ·	! <u>-</u>	
) Indirect Cost Rate				[From J-380 or J-580]	<u>.</u> .	<u></u>	6.48%
) Total Indirect Costs				[Line (05) x line (04)(a)]	·	\$	10,237.32
) Total Direct and Indirect Costs		· ····		[Line (04)(f) + line (06)]		\$	168,220.66
st Reduction						<u> </u>	
Ler Offsetting Savings						\$	-
Less: Reimbursements						\$	
Total Claimed Amount			[Line	(07) - {Line (08) + Line ((09)}]	\$	168,220.66

State Controller's Office					Scho	ooi Mandated	Cost Manual
Program 260 COMP	THE STU	D COSTS JLL ACT VITY COST D	ETAIL				FORM SA-2
`1) Claimant		(02) Fiscal Y					<u> </u>
richad Unified School District							2006-2007
(03)eimbursable Components: Check only one box per form to	identify the cor	mponent being	g claimed.				
A. CIE Review employee's techniques and strategies		Evaluation to incoff techniques as	clude assessment nd strategies			•	
Review STR Results		Assessment ba	sed on STR result	S			
B. CIE & NIE Evaluating and assessing CIE according to certain criteria		Reducing evalu	ation to writing	. 🗀.	Transmitting ev	aluation to CIE	
Attaching response to personnel file		Discussing eval	uation with CIE				
(04) Description of Expenses	-		1	C	Object Accoun	ts	
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed, and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
Attendance at training required to perform evaluations Adams, Gwen Assistant Principal Armstrong, Tressie Principal DeAnda, Jose Principal Holley, Keith Director Trogden, Erik Principal	\$60.21 \$56.80 \$76.21 \$76.21 \$70.24	3.0 1.0 2.0	\$ 170.40 \$ 76.21 \$ 152.42				
		' '	İ				1
Training staff that will be performing the evaluations Millikin, Carolyn Principal Norton, Топіе Assistant Superintendent, Personnel	\$76.21 \$94.20	1					
sparing to evaluate and assess the performance of a CIE Schoolsite Administrative St. Teacher Evaluations	\$70.53	214.7	\$ 15,142.79			w	-
Discussing the CIE's goals and objectives Schoolsite Administrative Sta Teacher Evaluations	\$70.53	255.2	\$ 17,999.26	**			
Pre-observation conference and discussion with CIE Schoolsite Administrative Str Teacher Evaluations	\$70.53	129.6	\$ 9,140.69				was to
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(05). Total 🗓 Subtotal 🗀	Page	1 of 1	\$ 45,248.19	\$ -	\$ -	\$ -	\$ _

New 12/05

Otate Controller's C	Jilice			MANDATE	D COSTS			Sch	ool Mandated	Cost Manua
Program				THE STU						FORM
260			COMP	ONENT/ACTIV		ETAIL				SA-2
') Claimant					(02) Fiscal Y					<u> </u>
ે વૃત Unified Sci	hool District				(02) 1 10021 1					2006-2007
(02)		<u> </u>							-	
(03) reimbursable (dentify the con	nponent being	g claimed.				
A. CIE		Review employee's tech strategies	niques and		Evaluation to income of techniques as	clude assessment				
		·				-				
		Review STR Results			Assessment bas	sed on STR result	S			
B. CIE & NIE		Evaluating and assessing	g CIE		Reducing evalu	ation to writing		Transmitting ev	aluation to CIE	
		according to certain crite	ena			-		- Transmitting or	2.000.017 (0 0.12	
		Attaching response to po	ersonnel file		Discussing eval	uation with CIE				
(04) Description of E	xpenses		_				0	bject Accour	its	
	(a))		(b)	(c)	(d)	(e)	(f)	(g)	(h)
	Employee N	ames, Job		Hourly Rate	Hours Worked	Salaries	Materials		Fired	Travel
Cli	assifications, Fun and Description	ctions Performed of Expenses		or	or	and Benefits	and Supplies	Contract Services	Fixed Assets	and Training
		· · · · · · · · · · · · · · · · · · ·		Unit Cost	Quantity		Соррано		·	- Tuning
Classroom observation to		sess performance Teacher Evaluations		670 F0						
-	Auministrative of	reacher Evaluations		\$70.53	354.0	\$ 24,967.62				
Post-observation confere			,				·	1		
Schoolsite /	Administrative St	Teacher Evaluations		\$70.53	203.7	\$ 14,366.96		1		
Discussing evaluation and										
Schoolsite /	Administrative Sta	Teacher Evaluations		\$70.53	223.3	\$ 15,749.35				
'ucing evaluation to w										
Schoolsite /	Administrative Sta	Teacher Evaluations		\$70.53	95.3	\$ 6,721.51				
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D5) Total 🗓) 5	Subtotal		Page 1	1 of 1	\$ 61,805.44	\$	\$ -	\$ -	\$ -
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State Controller's Office	MANDATE	COSTS			00110	or maridated	Cost Manua
Program	THE STU						FORM
260 COMPC	NENT/ACTIV		ETAIL				SA-2
1) Claimant		(02) Fiscal Y	'ear				
d Unified School District							2006-2007
(03) reimbursable Components: Check only one box per form to id	entify the com	nponent being	g claimed.		.		
A. CIE Review employee's techniques and	[——	Evaluation to inc	clude assessment				
A. CIE strategies		of techniques ar					
Review STR Results		Assessment bas	sed on STR result	s			
B. CIE & NIE Evaluating and assessing CIE		Reducing evalu	ation to writing		Transmitting ev	aluation to CIE	
according to certain criteria			•		Transming of	andion to org	
Attaching response to personnel file		Discussing eval	uation with CIE				
(04) Description of Expenses				0	bject Accoun	ts	
(a)	(b)	(c)	. (q)	(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed,	Hourly Rate	Hours Worked	Salaries and	Materials and	Contract	Fixed	Travel and
and Description of Expenses	or Unit Cost	or Quantity	Benefits	Supplies	Services	Assets	Training
		<u>-</u>		· .			
Preparing to evaluate and assess the performance of a CIE			:				
Schoolsite Administrative Str Teacher Evaluations	\$70.53	107.3	\$ 7,567.87			1	
Discussing the CIE's goals and objectives							
Schoolsite Administrative St: Teacher Evaluations	\$70.53	122.6	\$ 8,646.98				
Pre-observation conference and discussion with CIE							
Schoolsite Administrative Str Teacher Evaluations	\$70.53	68.6	\$ 4,838.36				
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O5) Total 🗓	Page	1 of 1	\$ 21,053.21	•	\$ -	•	-
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State Controller's Office			MANDATE	D COSTO	· · · · · · · · · · · · · · · · · · ·		Sch	ool Mandated	Cost Manu
Program 260	* . 	СОМР	MANDATE THE STU NENT/ACTIV	LL ACT	ETAIL				FORM SA-2
1) Claimant	istrict			(02) Fiscal Y	/ear	·			2006-200
(03) reimbursable Compo	nents: Check only one box per	form to id	dentify the con	nponent being	g claimed.				
A. CIE	Review employee's technique strategies	s and		Evaluation to inc of techniques ar	clude assessment nd strategies	l			
	Review STR Results		x	Assessment bas	sed on STR resul	ts			
B. CIE & NIE	Evaluating and assessing CIE according to certain criteria			Reducing evalu	ation to writing		Transmitting e	valuation to CIE	
	Attaching response to personn	nel file		Discussing eval	uation with CIE		* .		
(04) Description of Expens			·- · · -				bject Accou	nts	
	(a)		(b)	(c)	(d) ~	(e)	(f)	(g)	(h)
Classificat	ployee Names, Job ions, Functions Performed, escription of Expenses		Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
-							-		<u> </u>
Classroom observation to evaluate								s _i ār ^a	
Schoolsite Administ	Irative Str Teacher Evaluations		\$70.53	173.7	\$ 12,251.06		1		
Post-observation conference and Schoolsite Administ	discussion with CIE rative StrTeacher Evaluations		\$70.53	121.8	\$ 8,590.55				
Discussing evaluation and write-u Schoolsite Administ	rp with CIE rrative Str Teacher Evaluations		\$70.53	128.1	\$ 9,034.89				
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									-
05) Total 🗓	Subtotal		Page 1	of 1	\$. 29,876.50	\$ -	\$ -	\$ -	\$ -

Carlsbad Un' chool District 498/83 Ti. , 'ULL ACT 2006-2007 Sort by Name

				,			
Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
20-90	7.50	Adams, Gwen	Assistant Principal	\$60.21	\$451.58 At	\$451.58 Attendance at training required to perform evaluations	Review employee's techniques and strategies
70 90	00.6	Auailis, Gwell 10tal		, e	\$451.58		
10-00	3.00	Armstrong, Tressie Total	ringipal.	\$20.80	\$170.40 Au	\$170,40 Attendance at transing required to periorn evaluations \$170,40	Review employee's techniques and strategies
Aug-06	1.00	DeAnda, Jose	Principal	\$76.21	\$76.21 At	\$76.21 Attendance at training required to perform evaluations	Review employee's techniques and strategies
		DeAnda, Jose Total			\$76.21		
8/15/2006		Holley, Keith	Director	\$76.21	\$152.42 At	\$152.42 Attendance at training required to perform evaluations	Review employee's techniques and strategies
	2.00	Holley, Keith Total		;	\$152.42		
001-00	1.50	Millikin, Carolyn Millikin, Carolyn Total	Principal	\$76.21	\$114.32 Tr	\$114.32 Training staff that will be performing the evaluations	Review employee's techniques and strategies
Jan-07	2.00	Norton, Torrie	Assistant Superintendent. Personnel	\$94.20	\$118.40 Tr	\$188.40 Training staff that will be performing the evaluations	Review employee's techniques and strategies
Feb-07	2.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$188.40 Tr	\$188.40 Training staff that will be performing the evaluations	Review employee's techniques and strategies
Mar-07	4.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$376.80 Tr	\$376.80 Training staff that will be performing the evaluations	Review employee's techniques and strategies
Apr-07	1.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$94.20 Tr.	\$94.20 Training staff that will be performing the evaluations	Review employee's techniques and strategies
May-07	1.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$94.20 Tr	\$94.20 Training staff that will be performing the evaluations	Review employee's techniques and strategies
Aug-06	4.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$376.80 Tr	\$376.80 Training staff that will be performing the evaluations	Review employee's techniques and strategies
Sept-06	2.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$188.40 Tr	\$188.40 Training staff that will be performing the evaluations	Review employee's techniques and strategies
90-j 2	2.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$188.40 Tr	\$188.40 Training staff that will be performing the evaluations	Review employee's techniques and strategies
90- ^	1.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$94.20 Tr	\$94.20 Training staff that will be performing the evaluations	Review employee's techniques and strategies
7	19.00	Norton, Torrie Total			\$1,789.80		
20-90	107.30	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$7,567.87 Pr	\$7,567.87 Preparing to evaluate and assess the performance of a CIE	Review STAR results
20-90	214.70	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$15,142.79 Pr	\$15,142.79 Preparing to evaluate and assess the performance of a CIE	Review employee's techniques and strategies
20-90	122.60	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$8,646.98 Di	\$8,646.98 Discussing the CIE's goals and objectives	Review STAR results
09-07	255.20	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$17,999.26 Di	\$17,999.26 Discussing the CIE's goals and objectives	Review employee's techniques and strategies
20-90	68.60	Schoolsite Administrative Staff Teacher Evaluations	iff Teacher Evaluations	\$70.53	\$4,838.36 Pr	\$4,838.36 Pre-observation conference and discussion with CIE	Review STAR results
20-90	129.60	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$9,140.69 Pr	\$9,140.69 Pre-observation conference and discussion with CIE	Review employee's techniques and strategies
20-90	173.70	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$12,251.06 Cl	\$12,251.06 Classroom observation to evaluate and assess performance	Assessment based on STAR results
20-90	354.00	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$24,967.62 Cl	\$24,967.62 Classroom observation to evaluate and assess performance	Evaluation to include assessment of techniques and
20-90	121.80	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$8,590.55 Pc	\$8,590.55 Post-observation conference and discussion with CIE	Assessment based on STAR results
20-90	203.70	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$14,366.96 Pc	\$14,366.96 Post-observation conference and discussion with CIE	Evaluation to include assessment of techniques and strategies
20-90	128.10	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$9,034.89 Di	\$9,034.89 Discussing evaluation and write-up with CIE	Assessment based on STAR results
20-90	223.30	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$15,749.35 Di	\$15,749.35 Discussing evaluation and write-up with CIE	Evaluation to include assessment of techniques and strategies
20-90	95.30	Schoolsite Administrative Staff Teacher Evaluations	off Teacher Evaluations	\$70.53	\$6,721.51 Re	\$6,721.51 Reducing evaluation to writing, forward to personnel file	Evaluation to include assessment of techniques and strategies
	2,197.90		Staff Total		\$155,017.89		
9/2/2006	3.00	Trogden, Erik	Principal	\$70.24	\$210.72 At	\$210.72 Attendance at training required to perform evaluations	Review employee's techniques and strategies
	3.00						
	2,234.90	Grand Total			\$157,983.34		

Employee ACTUAL Time Record Sheet for Mandated Costs 498/83 The Stull Act (K-12)

FRI	516
(mx	/

POQ Departn	ent/Location	on 33 - 6200 12mc Telephone # Work	/11mo/ year le	10mo/hrly ngth(circle)
Reimbursa Code 31	able Activities Trainin district			
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lassroom	teacher time	e is not reimbursed unless separately compensated to attreentry per line.	end traini	ng.
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ibioaee Si		olease contact, at	~ /	

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Revised December 2005

Denartm	KELLY S	CHOOL 760 / 33/-5800 Telephone # 12mo		10mo/hrl ngth(circ
			year le	ngth(circ
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Code 32	Evalua or any evalua is, repe	ntor trainees: Time spent by district staff to attend training, other source, on how to perform the reimbursable certifications. Each trainee can be reimbursed only once for the seat training is not reimbursed.	conducte Ited emp arne trair	ed by the d loyee ning course
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District/C	:OE: <u>_</u>	1187				
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	ent/Location	on	Telephone #	_ <u>12mo/</u> Work	<u>/11mo/</u> year le	10mo/hrly ngth(circle)
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Date:	Activity Code (circle one):	Describe the activity:			Time in	Substitutes &
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District/C	OE: C	USD	Fiscal Year:_	20	D6-200
Employe	e Name	in Halley Exact	Director Position Title		
	CVA ent/Location	331-5200 Telephone #		1/1ma/ /ear lei	10mo/hrly ngth(circle)
Reimbursal Code 31	ble Activities Trainin district	Codes: g evaluators: Time spent by district staff staff on how to perform the reimbursable	preparing and co certificated empl	nducting	training of aluations.
Code 32 Classroom	evalua is, repe	tor trainees: Time spent by district staff to other source, on how to perform the reimble tions. Each trainee can be reimbursed on eat training is not reimbursed.	oursable certification in the safety once for	ted empi Ime trair	oyee ling course, tha
NOTE: On	ly one code	entry per line.	perisated to atter	io trainir	ıg.
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оруківнт 200 V 1 5 200	1111	ociates		Rev	rised December 2005

	/ /	() Chaining of Evaluators			
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Car	()	Milligin Prince	pal		_
Employe	e Name	Exact Position Title			_
Vaille	ey M	> 100.331-5300 12mg	(a - 1	d Omer en Heart	
Departme	ent/Location	on Telephone # Work	year le	10mo/hrly ngth(circle)	
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Code 32	evalua	tor trainees: Time spent by district staff to attend training, other source, on how to perform the reimbursable certifications. Each trainee can be reimbursed only once for the seat training is not reimbursed.	itad amai	l=1.0=	
Classroom NOTE: On	teacher time ly one code	e is not reimbursed unless separately compensated to atte	end trainii	ng.	
Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost]
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f you have a	ny questions,	please contact, at			
PLEASE SUE	METHE IN	FORMATION BY; TO			
	SALL Tand	•		vised December 20	05

Employee ACTUAL Time Record Sheet for Mandated Costs 498/83 The Stull Act (K-12)

District/COE: Carbbal Unified Fiscal Year: 200607 Torru Norton Asst. Supt Personnel Employee Name									
District/C	OE: <u>(</u>	1215bal	Unified	Fiece	i Vear	20	06-67		
Tori	ru N	prton		A56=	4 +	<u>/</u>	Da == ==		
Employe	e Name	1		Exact Positi	on Title	<u> </u>	er sonne		
Gers	onnel	- D.O.	160-331-	5015					
Departme	ent/Location	on	Telej	phone #	Work v	<u>11mo/</u> /ear le:	10mo/hrly ngth(circle)		
Reimbursal	ole Activities	Codes:							
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	district	staff on how to	o perform the rein	ibursable certifica	ated emplo	oyee ev	aluations.		
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Classroom	teacher time	e is not reimbu	ırsed unless separ	ately compensat	od to attac		-		
NOTE: On	ly one code	entry per line	e.	awiy compensat	eu to atter	io trainii	ng.		
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		please contact _ FORMATION BY		_;TO	, at _	760-	331-50		

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)	Employ	498/	Time Record 83 The Sturaining of E	II Act (K-12)		Costs	107	
District/C(of Car	lshed/s	an Dieso	Fisca	i Year	5	66	
District/CO		10	(2	-				•
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		is not reimburs entry per line.	ed uniess sepa	rately compensa	ted to atter	nd trainir	ng.	
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Schedule 1 Carlsbad Unified School District 498/83 Stull Act - Teacher Evaluations Fiscal Year 2006-2007 Time Summary

Purpose: To summarize Total Hours Worked by administrators evaluating teachers.

Source: Schedule 1A, 1B and 1C.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
Code 11		
Probationary	19.0	38.0
Permanent	70.0	140.0
Temporary	18.3	36.7
	107.3	214.7
Code 12		
Probationary	19.0	42.8
Permanent	93.3	186.7
Temporary	10.3	25.7
	122.6	255.2
Code 13		
Probationary	6.7	14.3
Permanent	56.0	93.3
Temporary	5.9	22.0
	68.6	129.6
Code 14		
Probationary	19.0	57.0
Permanent	140.0	256.7
Temporary	14.7	40.3
· · · · ·	173.7	354.0
Code 15	40.0	
Probationary	19.0	38.0
Permanent	93.3	140.0
Temporary	9.5	25.7
Codo 46	121.8	203.7
Code 16 Probationary	23.8	20.0
Permanent	93.3	38.0 163.3
Temporary	93.3 11.0	22.0
remporary	128.1	
Code 17	120.1	223.3
Probationary		14.3
Permanent		70.0
Temporary		11.0
		95.3
4		3.01.0

Conclusion: Findings go forward to SA-2.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

de 15- Post-observation conference with instructor

Jode 16- Final conference with instructor

Code 17- District reporting

Print Date: 1/16/2008 CBAD SA 06-07 bob

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives
- (D) Suitable learning environment

Schedule 1A Carlsbad Unified School District 498/83 Stull Act - Probationary Teacher Evaluations Fiscal Year: 2006-2007 Time Summary

Purpose: To summarize total hours spent by administrative staff on "probationary" teacher evaluations.

Source: Schedule 2A and 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
# of reimbursable K-12 evaluations	57	57
Avg. time p/ evaluation preparation	20	40
Total Time (in minutes)	1140	2280
Per Hour	60	60
Hours Worked (Code 11)	19.0	38.0
# of reimbursable K-12 evaluations	57	57
Avg. time p/ goals & obj. conf. with instructor	20	45
Total Time (in minutes)	1140	2565
Per Hour	60	60
Hours Worked (Code 12)	19.0	42.8
# of reimbursable K-12 evaluations	57	57
Avg. time p/ pre-observation conf. with instructor	7	15
Total Time (in minutes)	399	855
Per Hour	60 .	60
Hours Worked (Code 13)	6.7	14.3
# of reimbursable K-12 evaluations	57	57
Avg. time p/ classroom observation of instructor	20	60
Total Time (in minutes)	1140	3420
Per Hour	60	60
Hours Worked (Code 14)	19.0	57.0
# of reimbursable K-12 evaluations	57	57
Avg. time p/ post-observation conf. with instructor	20	40
Total Time (in minutes)	1140	2280
Per Hour	60	60
Hours Worked (Code 15)	19.0	38.0
# of reimbursable K-12 evaluations	57	57
Avg. time p/ final conf. with instructor	25	40
Total Time (in minutes)	1425	2280
Per Hour	60	60
Hours Worked (Code 16)	23.8	38.0
# of reimbursable K-12 evaluations		57
Avg. time p/ district reporting		· 15
Total Time (in minutes)		855
Per Hour		60
Hours Worked (Code 17)		14.3

Conclusion: Findings will go forward to the Schedule 1.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

ode 16- Final conference with instructor

Code 17- District reporting

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives
- D) Suitable learning environment

Schedule 1B Carlsbad Unified School District 498/83 Stull Act - Permanent Teacher Evaluations Fiscal Year: 2006-2007 Time Summary

Purpose: To summarize total hours spent by administrative staff on "permanent" teacher evaluations.

Source: Schedule 2B and 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
# of reimbursable K-12 evaluations	280	280
Avg. time p/ evaluation preparation	15	30
Total Time (in minutes)	4200	8400
Per Hour	60	60
Hours Worked (Code 11)	70.0	140.0
# of reimbursable K-12 evaluations	280	280
Avg. time p/ goals & obj. conf. with instructor	20	40
Total Time (in minutes)	5600	11200
Per Hour	60	60
Hours Worked (Code 12)	93.3	186.7
# of reimbursable K-12 evaluations	280	280
Avg. time p/ pre-observation conf. with instructor	12	20
Total Time (in minutes)	3360	5600
Per Hour	60	60
Hours Worked (Code 13)	56.0	93.3
# of reimbursable K-12 evaluations	280	280
Avg. time p/ classroom observation of instructor	30	55
Total Time (in minutes)	8400	15400
Per Hour	60	60
Hours Worked (Code 14)	140.0	256.7
# of reimbursable K-12 evaluations	280	280
Avg. time p/ post-observation conf. with instructor	20	30
Total Time (in minutes)	5600	8400
Per Hour	60	60
Hours Worked (Code 15)	93.3	140.0
# of reimbursable K-12 evaluations	280	280
Avg. time p/ final conf. with instructor	20	35
Total Time (in minutes)	5600	9800
Per Hour	60	60
Hours Worked (Code 16)	93.3	163.3
# of reimbursable K-12 evaluations		280
Avg. time p/ district reporting		15
Total Time (in minutes)		4200
Per Hour		60
Hours Worked (Code 17)		70.0

Conclusion: Findings will go forward to the Schedule 1.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

pde 16- Final conference with instructor

Jode 17- District reporting

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives
- (D) Suitable learning environment

Schedule 1C Carlsbad Unified School District 498/83 Stull Act - Temporary Teacher Evaluations Fiscal Year: 2006-2007 Time Summary

Purpose: To summarize total hours spent by administrative staff on "temporary" teacher evaluations.

Source: Schedule 2C and 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
# of reimbursable K-12 evaluations	44	. 44
Avg. time p/ evaluation preparation	25	50
Total Time (in minutes)	1100	2200
Per Hour	60	60
Hours Worked (Code 11)	18.3	36.7
# of reimbursable K-12 evaluations	44	44
Avg. time p/ goals & obj. conf. with instructor	14	35
Total Time (in minutes)	616	1540
Per Hour	60	60
Hours Worked (Code 12)	10.3	25.7
# of reimbursable K-12 evaluations	44	44
Avg. time p/ pre-observation conf. with instructor	8	30
Total Time (in minutes)	352	1320
Per Hour	60	60
Hours Worked (Code 13)	5.9	22.0
# of reimbursable K-12 evaluations	44	44
Avg. time p/ classroom observation of instructor	20	55
Total Time (in minutes)	880	2420
Per Hour	60	60
Hours Worked (Code 14)	14.7	40.3
# of reimbursable K-12 evaluations	44	44
Avg. time p/ post-observation conf. with instructor	13	35
Total Time (in minutes)	572	1540
Per Hour	60	60
Hours Worked (Code 15)	9.5	25.7
# of reimbursable K-12 evaluations	44	44
Avg. time p/ final conf. with instructor	15	30
Total Time (in minutes)	660	1320
Per Hour	60	60
Hours Worked (Code 16)	11.0	22.0
# of reimbursable K-12 evaluations		44
Avg. time p/ district reporting	•	15
Total Time (in minutes)		660
Per Hour		60
Hours Worked (Code 17)		11.0

Conclusion: Findings will go forward to the Schedule 1.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

ode 16- Final conference with instructor

Jode 17- District reporting

*Evaluation Criteria

- (A) District standards and test results
- (B) Instructional techniques/strategies
- (C) Adherence to curricular objectives
- (D) Suitable learning environment

498/83 The Stull Act (K-12) Routine Evaluations of Instructors DISTRICT STATISTICS REPORT

The following cost accounting statistics report the required information in the sp	aces pr	ovided.			- GIOTITO		Dui Seiii	ent. P	ease
Certificated Instructors Statistical Data	<u> </u>				Fisca	l Year		,	06-0
	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	
1 A K-12 Probationary Teachers- Total Number			·						10
1 B K-12 Permanent Teachers- Total Number							·		454
1 C K-12 Temporary Teachers- Total Number									44
1 D K-12 Classroom Teachers- A + B+ C = Total Number									510
2 A K-12 Probationary Teachers- Total Number Evaluated	·								57
2 B K-12 Permanent Teachers- Total Number Evaluated	·								280
2 C K-12 Temporary Teachers- Total Number Evaluated									44
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated	·	·							381
8* K-12 Categorical/Grant Teachers- Total Number Evaluated									1
Reimbursable K-12 Evaluations Line 2 D subtract Line 3									380
C. 54444.2 Migrant children E.C. S.C. 25; 2604 Indian School Assistance Act MPLOYEE CERTIFICATION: The State of Califorandates in order for the district to receive reimbut at or have provided a good faith estimate which alifornia to be true and correct based on your permoses only. PLEA	54425(b) 54724 Dr Any si mia requir rsement. you "certir sonal kno	op-out Pritate-feder res that so Your sign fy (or dec wledge o BLUE INK	1 Federa revention ral-local c chool dis- nature on lare) und r informa	E.C. (F.C. (rant- fun- trict perso this form	32002.5 sided personnel mei certifies	lucation Bate Cate onnel ntain a re that you ry under a tion is us	egorical ecord of d	orted act	tate

Revised December 2074

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498/83 The Stull Act (K-12) Routine Evaluations of Instructors DISTRICT STATISTICS REPORT

District/COE:	Cil	22	101	

The following cost accounting statistics will assist the calculation of the district=s reimbursement. Please report the required information in the spaces provided.

	*	<u> </u>	
Certificated Instructors Statistical Data		Fiscal	Year
Statistical pata	05-06	06-07	07-08
1 A K-12 Probationary Teachers- Total Number		2	
1 B K-12 Permanent Teachers- Total Number		19	-
1 C K-12 Temporary Teachers- Total Number		4	
1 D K-12 Classroom Teachers- A + B+ C = Total Number		-25	
2 A K-12 Probationary Teachers- Total Number Evaluated		7	
2 B K-12 Permanent Teachers- Total Number Evaluated		3	
2 C K-12 Temporary Teachers- Total Number Evaluated		0	
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated		111	
3* K-12 Categorical/Grant Teachers- Total Number Evaluated	-	CX	
4 Reimbursable K-12 Evaluations- Line 2 D subtract Line 3	-	12	 -
*E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52852 Coordinated Categorical E.C. 54425(b) Chapter 1 Federal compensa E.C. 54444.2 Migrant children E.C. 54724 Drop-out Prevention E.C. U.S.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant-funded	tory educat 62002.5 : Dersonnel	tion State Categ	porical
EMPLOYEE CERTIFICATION: The State of California requires that school district per for state mandates in order for the district to receive reimbursement. Your signature of have reported actual data or have provided a good faith estimate which you "certify (or perjury under the laws of the State of California to be true and correct based on your proformation." This information is used for cost accounting purposes only. PLEASE USE INDICATE THIS INFORMATION IN THIS INFORMATION IN THE SUBMITTURE AND THE PROPERTY AND	n this form r declare) u rersonal kni SE BLUE IN	certifies tha Inder penalt	
PLEASE SUBMIT THIS INFORMATION BY; TO;	·		

498/83 The Stull Act (K-12) Re-evaluations of Unsatisfactory Certificated Permanent Staff DISTRICT STATISTICS REPORT

Statistical Data: Certificate Staff on					Eina	1			
Unsatisfactory Status	97-98	98-99	99-00	00.01		l Year	03-04		06-0
5 K-12 Permanent Instructors					11	02-03	03-04	04-05	U5=00
A. Number on unsatisfactory status						77			~
B. Number of re-evaluations									0
Permanent Non-Instructors:									
A. Number on unsatisfactory status									0
3. Number of re-evaluations									0
									
Reimbursable Re-evaluations 5 B + 6 B = Total								·	
On-reimbursable re-evaluations (Do not Any positions funded by these cate C. 52012 School Improvement C. 52176 LEP/Bilingual C. 54425(b) Chapter 1 Federal comper C. 54444.2 Migrant Children C. 62002.5 State Categorical Any position that is grant-funded Re-evaluations of temporary and in	E.C. E.C. nsatory E.C. U.S.	52065 52852 educat 54724 C. 25; 2	Native Coordi ion Drop-o 2604 Inc	Americ nated Co out Previ dian Sch	an Categori ention nool Ass	sistance			ø
IPLOYEE CERTIFICATION: The State of Californ Indates in order for the district to receive reimbur is or have provided a good faith estimate which y lifornia to be true and correct based on your persuposes only. PLEAS PLEAS OF THIS INFORMATION BY NOV 1 5 2007 PYRIGHT 2004 SixTen and Associates	ou "certi	fy (or dec	lare) und	er penalt	y of perju	that you ry under	have rep the laws	orted act of the Sta	ual ate of

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1 of 2

Time Study

Purpose: To extrapolate average time spent by administrative staff evaluating probationary teachers.

Source: SA 1.7-1-A Average Timesheets.

Findings:

-							-	* *	tivity	*Activity Codes	S						
			1	1			12	2		:	13	3			14		
Schoolsite	Staff	4	В	ပ	۵	4	B	ပ	۵	A	m	ပ	۵	۷	8	ပ	۵
Aviara Oaks Middle	Marg Watson	**160	**160			**120 **120	**120			**120 **120	**120			**200	**200		
Buena Vista	Jose DeAnda										9	10	9		09	90	99
C/E	Leslie Harden		10			15	15				ഹ	5		5	15	15	9
CHMS	Catina Hancock	40	40	40	40	5	ည	2	2					45	45	45	45
CVA	Keith Holley	30	30			30	30			5	5			**195	**195		
Hope	Rich Tubbs	10				5	5	2	5	5	5	10	5	5	15	15	10
Kelly	Robert Devich	30	30	20	20	80	8	80	80	**160 **160	**160	**160	**160	**240	**240	**240	**240
Pacific Rim	Gwenn Adams	10	15	15	10	10	15	15	10	9	15	15	10	10	15	15	5
	Steve Ahle	10	10	10	10	**120 **120		**120	**120	5	5	5	5	09	09	09	90
Valley	Carolyn Millikin					15	15	15	15	12	12	12	12	12	12	12	12
Averages		22	23	21	20	23	24	24	23	7	6	10	8	23	32	32	30
Summation of criteria B and C	ia B and C	 	44				48	[[} 	¦≃ 		 		63	† • • • • • • • • • • • • • • • • • • •	:
Averages to be used	F	20	4			20	45	2		7	-	15		70	9	1 .	
									•						-		

Conclusion: Findings will go forward to Schedule 1A.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor Code 17- District reporting

Evaluation Criteria

Criteria A - district standards and test results Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives Criteria D - suitable learning environment **Times were not used to calculate averages

Purpose: To extrapolate average time spent by administrative staff evaluating probationary teachers. Source: SA 1.7-1-A Average Timesheets.

Findings:

						*	ctivity	*Activity Codes	ျှ				
				15			_	16				7	
Schoolsite	Staff	⋖	В	ပ	D	4	8	ပ	Ω	4	В	ပ	_
Aviara Oaks Middle	Marg Watson	**240	**240 **240			30	99			စ္က	30		L.
Buena Vista	Jose DeAnda		2	5	5								
	Leslie Harden	5	15	15	9	2	10	10	5		30.		
CHMS	Catina Hancock	20	70	20	20	40	40	40	40	5	2	2	ıc
	Keith Holley	**150	**150 **150			70	70			15			
Hope	Rich Tubbs	5	9	10	10	5	5	5	5	9	10	10	5
	Robert Devich	09	09	09	90	**210	**210 **210	**210	**210	8	30	30	30
Pacific Rim	Gwenn Adams	10	15	15	10	19	15	15	10	0	0	0	0
	Steve Ahle	30	30	30	30								
Valley	Carolyn Millikin	12	12	12	12	18	18	18	18		!		
Averages		20	21	21	20	25	22	18	16	15	18	11	10
Summation of criteria	ria B and C		1	42		'	4	44			15	 	[
Averages to be used	p	20	4	40		25	4	40		 	15		

Conclusion: Findings will go forward to Schedule 1A.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor Code 16- Final conference with instructor

Code 17- District reporting

Evaluation Criteria

Criteria A - district standards and test results Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives Criteria D - suitable learning environment **Times were not used to calculate averages

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY 498/83 The Stull Act (K-12)

Routine Evaluations of Instruct	ore	FICE	DA HO	NAKI
Please report below the average amount of time spent (in minutes the reimbursable activities for the mandated program.	s) by you	u to imp	lement	each of
(USD)				
District/COE Department/I	Locatio	n //	OM	
Employee Name Exact Position	n Title	Pr	MC	ipâ
Telephone # 12mo/11mo/10mo/hrly Fiscal Year: Work year length(circle) 01-02		98-99	99-00	00-01
Circle the years	for whic	03-04 h you are	04-05 respon	05-06 ding
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor	ructional erence t able lear	dards and technique o curricu ning env	ies/strat lar objed ironmen	egies ctives it
Allocate the average time spent on each criterion (A-D) for		age Tim		
each of the following evaluation steps:	Α	В	С	D
Code 11 Preparing for the evaluation	160	160		
Code 12 Goals and objectives conference with instructor	120	120		
Code 13 Pre-observation conference with instructor	120	Bo	-	
Code 14 Classroom observation of instructor	200	200		
Code 15 Post-observation conference with instructor	240	240		
Code 16 Final conference with instructor	30	30		
Code 17 District Reporting	30	30		
EMPLOYEE CERTIFICATION: The State of California requires that school ecord of data for state mandates in order for the district to receive reimbur form certifies that you have reported actual data or have provided a good to declare) under penalty of perjury under the laws of the State of Californian your personal knowledge or information." This information is used for a PLEASE USE BLUE INK Employee Signature You have any questions, please contact	rsement. faith esti ia to be t ost acco	Your sig mate wh	gnature ich you correct urposes	on this "certify based only.

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY 498/83 The Stull Act (K-12)

PROBATIONARY

Routine Evaluations of Instructors

the reimbursable activities for the mandated progra	seni (in minutes im.	s) by you	n to imb	plement	each of
CUSD					
District/COE	Department/l	Locatio	n B		16-0
Employee Name	Exact Positio	n Title		. (<i>,</i>
12mo/11mo/10mo/hrly	Fiscal Year:	97_98	08-00	00.00	00.01
Telephone # Work year length(circle)	01-02	02-03	03-04	04-05	05-06
Reimbursable Activities Codes:	Circle the years	for whic	n you ar	e respon	ding
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor	(A) distr (B) instr (C) adh	uctional erence t able lear	iards an techniq o curricu ning env	id test re ues/stra ular obje vironmer	tegies ctives nt
Allocate the average time spent on each criterion (A each of the following evaluation steps:	-D) for	ł .		ne in Mi	
steps:		Α	В	С	D
Code 11 Preparing for the evaluation					
Code 12 Goals and objectives conference with in	nstructor				
Code 13 Pre-observation conference with instruc	etor		10	10	10
Code 14 Classroom observation of instructor			20	20	60
Code 15 Post-observation conference with instru	ctor	,	5	5	5
Code 16 Final conference with instructor					
Code 17 District Reporting					
EMPLOYEE CERTIFICATION: The State of California rececord of data for state mandates in order for the district to come certifies that you have reported actual data or have or declare) under penalty of perjury under the laws of the on your personal knowledge or information." This information PLEASE USE BLUE INK Employee Signature Fyou have any questions, please contact PLEASE SUBMIT THIS INFORMATION BY	o receive reimbui provided a good State of Californ ation is used for c	rsement faith esti ia to be ost acco	. Your si mate wi	gnature nich you correct ourposes	on this "certify

SA 1.7-1-A

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY 498/83 The Stuli Act (K-12) PROBATIONARY

Routine Evaluations of Instructors

Please report below the average amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

	the rein	nbursable :	activities to	ir the mandat	ed orogra: Sed orogra:	ent (in	minute	es) by y	mi. at·uo	plemen	t each o	ıF.
		I = I	1001		~~ p. og, a	1111	•				•	
	District	. کے ہ	ے۔۔ یہ بہالما	Hora	e -	Depa	riment	/Locati	on	(4	HE	
	=mplo)	ee Name		* ************************************		Exact	: Posití:	on Title	, _3	50.	A A :	
	·		<u>12mo</u> /	11mon10mc	o/hrlv ·				_		المالة	إيسا
	Telepho	one #	Work	year length(circle)			97-98 02-03 for which	U.S. V.	A4 A=		,
	Code 11	Preparing 4	for the over	Intion				uwn wm	IIIA.			-
, 1	Code 13 Code 14	Pre-observ	objectives o ration confe	conference with rence with inst	Nic tor	• •	(A) dist (B) inst (C) adf	trict stan tructions referce table les	dards ar I technic to curric	Ues/stra Ues/stra	tegies	
	4006 10	Cirigii Coute	MERCE MATE	romanación Plance with ins	tructor		· (/		rinig en	ALCOULUE!	7t	•
	GODE 17	namet Leb	orling	<u> </u>	CLASSR	ээм та	ACHEN	Tibre to	 -			
	Allocate	the averag	e time spe	nt on each cri	CLASSR) for	ACHEK					í
	each or	the followin	ig evaluati	on steps:		., 164		Ave	rage Tin	ne in Mi	nutes	
	Code 11	Cros						A.	В	<u> </u>	D	
		·		evaluation		,	•		0			
	Code 12	Goal	s and object	tives conferen	ce with insi	ructor		15				
	Code 13	Pre-c	bservation	conference wi	th instructo	r	. , <u> </u>	_65	- C			
	Code 14	Class	room obse	rvation of instr	uctor				<u>- = 5</u>	5		
	Code 15	Post-	observation	conference w	ith instructo	- <u>-</u>	<u> </u>	5 .7	15	45	0	
	Code 16	Final	conference	with instructor		··		5	15	15	0	
	Code 17	Distric	t Reporting			<u> </u>		5	10	10	5	
_		<u> </u>			·		/`		於			
Ε	MPLOYEE	CERTIFIC	ATION: The	State of Calif	Arries consider							
(O)	r declare) Lyour pers PLE	under pena cnal knowle ASE USE B	ity of perjung dge or infor LUE INK	State of Califi Torder for the old actual data of Under the law mation," This	or have now	vided -		PHILETY,	Lorit 818	nature o	1 this	
lf y	on pave s oproves 21	gnature hy question	s, please co	intact /	lard	0-	Da		KS/	ركزاتها	د. د	
PĻ	EASE SU	BMIT THIS	INFORMAT	ION BY		: T0			, ar	7	<u> </u>	

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY

Employee Signature

If you have any questions, please contact PLEASE SUBMIT THIS INFORMATION BY

498/83 The Stull Act (K-12)

PROBATIONARY

Routine Evaluations of Instructors

Please report below the average amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

Department/Location

	۵۱ ۱۱۰۷		e ·	LXACE	OSILIO	ii iiue	1	1110	
331-64	ω	12mo/11mo/1	0mo/hrlv	Fiscal	Year	97-98	98-99	99-00	ž.
Telephone#		Work year len		1 1000			03-04		
			<u> </u>	Circle t	he years	for which	h you are		
Reimbursable A					Evaluat	on Crite	ria:		
Code 11 Prepa							iards and		
		jectives conference on conference wit		or			techniqu		
		on contende with servation of instri		•			o curricu		
· ·		tion conference w	the state of the s		(D) Suit	able lear	ning env	ironmen	łζ
		nce with instructor				•			
Code 17 Distri				SROOM T	FACHER	TIME IS	NOT REI	MRURSE	=n
		time spent on ea	-		,				
		evaluation steps		A-D) for		Avei	age Tim	e in Mil	nutes
			·			Α	В	С	D
Code 11	Ргера	ring for the evalua	ition			116			a i
	<u> </u>	•				40	140	40	40
Code 12	Goals	and objectives co	nference with	instructor	•			~	~
						5	5	5	5
Code 13	Pre-oh	servation confere	ence with instru	ictor	· · · · · · · · · · · · · · · · · · ·		50		4
	. ,		moo waa moere	-0101		O			10
0	01		.6: 1 . 1			1. ,	,		<u> </u>
Code 14	Classi	oom observation	of instructor			46	1/16	11	1115
	····				·	10.	40	70	190
Code 15	Post-o	bservation confer	ence with instr	uctor		a PA	NAT .	~~~~~	200
		·				20	20		U
Code 16	Final	conference with in	structor	-		110		it	4.2
	1 11101 0	omerenee with in	311 40101	0		40	40	40	40
Code 17	Dietrie	t Reporting				~	-		
Coue II	טווופוע	rvehorning		٠		16	15	5	15
<u> </u>								<u> </u>	
EMPLOYEE OF	COTICIO	ATION! The Otes				1 11 1	-		
	EK HEIC	ATION: The State	or Calitornia r	equires t	nat scho	ol district	personr	nel main	tain a

record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only.

PLEASE USE BLUE INK

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY

Code 16

Code 17

498/83 The Stull Act (K-12)

PROBATIONARY

10

Routine Evaluations of Instructors

Please report below the average amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/CO	ousb		Depa	rtment/	Locatio	on CV	'A	
Employee	Name	10	Exact	Positio	on Title	Dire	ctor	
331-52 Telephone	# Work	2/11mb/10mo/hrly year length(circle)		01-02	02-03	98-99 03-04 h you ar	04-05	00-01 05-06
Code 11 Pre Code 12 Gos Code 13 Pre Code 14 Clas Code 15 Pos	observation conf ssroom observati t-observation con al conference with	aluation conference with instructor on of instructor ference with instructor on finstructor ference with instructor in instructor	ctor	(A) dist (B) inst (C) adl (D) suit	ion Crite rict stand ructional perence t able lear	ria: dards an techniq to curricu rning env	d test re ues/strai ılar obje vironmer	sults tegies ctives
		- OLAC	SROOM T	CACHER	THRE 13	NOLKE	INIDOKO	עב
Allocate the	average time sp	ent on each criterion		LACHER		rage Tin		
Allocate the		ent on each criterion		CACHER				
Allocate the	average time sp ollowing evalua	ent on each criterion		CACHEN	Ave	rage Tin	ne in Mi	nutes
Allocate the each of the t	average time sp following evalua Preparing for	pent on each criterion ation steps:	(A-D) for		Ave	rage Tin B	ne in Mi	nutes
Allocate the each of the f	average time sp following evaluated Preparing for Goals and obj	pent on each criterion ation steps: the evaluation	(A-D) for		Aver A	B 30	ne in Mi	nutes
Allocate the each of the f	average time spollowing evaluate Preparing for Goals and obj	pent on each criterion ation steps: the evaluation jectives conference with	(A-D) for		Ave 30 30	B 30	ne in Mi	nutes

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (er declare) under penalty of perjury under the laws of the State of California to be true and correct based This information is used for cost accounting purposes only.

PLEASH USE BLUE INK

Final conference with instructor

District Reporting

- ")	V 1 5 2007 W Comployee Signature	Date 9-27-07
BY:	If you have any questions, please contact \ Kedy Holley	at 331-5295
	PLEASE SUBMIT THIS INFORMATION BY; TO _	

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY 498/83 The Stull Act (K. 12)

11(05/(Pouting	S me sur	1 ACt (K-12)		PRO	BATIC)NAR
Please rep	ort below the <i>average</i> amo	Evaluation	s of Instruct	ors			•
the reimbur	sable activities for the mar	ndated progra	ent (in minutes m.	s) by yo	u to imp	plement	t each o
	Carlshal	, 5					
District/CC)E	 	Department/	locatio	Hope	•	
R	ch Tubbs						
Employee	Name		Exact Position	THE	X		
_33159	60	_	LACE PUSITIO	n ille			
Telephone		Omo/hrly	Fiscal Year:	97-98	98-99	99-00	00-01
- Cicprionic	# Work year len	gin(circle)	01-02	02-03	03-04	04-05	05-06
Reimbursable	e Activities Codes:		Circle the years Evaluation	ion Crite	n you ar ria:	e respor	nding
Code 11 Pro	eparing for the evaluation pals and objectives conferenc	o with in the city	(A) disti	rict stand	dards ar	d test re	esults
Code 13 Pre	e-observation conference witl	h instructor	. ,	ructional	techniq o currici	ues/stra	itegies
Code 14 Cla	assroom observation of instru	ictor	(D) suita	able lear	ning en	vironme	nt
Code 15 Po	st-observation conference winal conference with instructor	th instructor		. * *	. •		
Code 17 Dis	strict reporting		OOM TEACHER	TIME IS	NOT DE	Meuse	- -
Allocate the	e average time spent on each	ch criterion (A.					
each of the	following evaluation steps	:	5, 101		rage Tin	Te in ivi	nutes
				A	В	С	. D
Code 11	Preparing for the evaluat	ion		1			
	· · · · · · · · · · · · · · · · · · ·			10			
Code 12	Goals and objectives cor	nference with in	structor	ا م			1
				5	5	5	λ,
Code 13	Pre-observation conferer	nce with instruc	or .	٠	, ,		1
· · · · · · · · · · · · · · · · · · ·				5	10	10	5
Code 14	Classroom observation o	f instructor				, ,	
				5	15	15	10
Code 15	Post-observation confere	nce with instruc	tor	`	,		,
		·		5	10	10	10
Code 16	Final conference with inst	tructor					_
·				5	5	5	5
Code 17	District Reporting						
	-			10	10	10	5
TMDL OVER 6				· · · · ·			L
ecord of data	CERTIFICATION: The State of for state mandates in order that you have reported actual	of California req	uires that schoo	district	personn	el main	tain a
· , , = =, , , , , , , , , , , , , , , ,	nal knowledge or information	." I his informa	tion is used for c	ost acco	ounting p	urpose	s only.
		711		. G	Luk -		
you have an	nature y questions, please contact	ivus		Date %	124/17 st		
	MIT THIS INFORMATION BY		· TO	·	,		

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY 498/83 The Stull Act (K-12) PROBATIONARY

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Routine Evaluations of Instructors

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/0	OBERT DEVICH	Departme	nt/Locatio	n KEI	LY SCH	100j
Employe	ee Name	Exact Pos	ition Title	PRI	NCU	DA L
Telépho		Fiscal Year	97-98 02 02-03	98-99 03-04	99-00 04-05	00-01 05-06
Code 11 Code 12 Code 13 Code 14 Code 15 Code 16 Code 17		Evalu (A) c (B) ii (C) a (D) s	uation Crite listrict stand nstructional adherence t suitable lear	ria: dards an techniq to curricu ning env	id test re ues/stra ular obje vironmer	esults tegies ctives nt
Allocate	the average time spent on each criterion (A- the following evaluation steps:	D) for	Aver	age Tin	ne in Mi	nutes
	ovaldation steps.	·	A	В	С	D
Code 11	Preparing for the evaluation		30	30	20	20
Code 12	Goals and objectives conference with in	structor	80	80	80	80
Code 13	Pre-observation conference with instruct	or	160	160	160	160
Code 14	Classroom observation of instructor		240	a40	a40	240
Code 15	Post-observation conference with instruc	etor	60	60	60	60
Code 16	Final conference with instructor		210	2/0	210	210
Code 17	District Reporting		30	30	30	30
EMPLOYE	E CERTIFICATION: The State of California rec	uires that sch	nool district	personn	nel main	tain a

	transit of the feature of the State of California requires that school district personnel maintain a
	record of data for state mandates in order for the district to reselve reimbursement. Vous signature and the
	form certifies that you have reported actual data or have provided a good faith estimate which you "certify
	(or declare) under penalty of position and the flow provided a good faith estimate which you "certify
~ -	(or declare) under penalty of perjury under the laws of the State of California to be true and correct based
n))	This information is used for cost accounting purposes only. This information is used for cost accounting purposes only.
. (14-4	TLEASE WISE BLUE INK
•	Ethip Lby ge 20 gratuite
	If you have any questions, please contact Date , at
DV	, at
	PLEASE SUBMIT THIS INFORMATION BY

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY 498/83 The Stull Act (K-12) PROBAT

Please report the reimburs	t halow the area	utine Evaluatio					
the reimburs	t below the avera	ge amount of time	spent (in minu	ites) by yo	u to imp	lement	each
/ /	able activities to	the mandated progr	ram.		-		
· · ·	Ishad US	>U	Departme	-		16.	\mathcal{Y}
District/CO	N U	-	Departme	nt/Location	on ta	51410	J 9K 1
しいし/ Employee N)	Exact Pos		1	مأدر	
331-6	$\sim \alpha$		Exact Pos	ition Title	ASS	51510	WI F
Telephone:	<u> </u>	1mo/10mo/hrly	Fiscal Year	97-98	98-99	99-00	00-0
,		ear length(circle)	01-0 Circle the yea)2 02-03	03-04 h you an	04-05	05-06
Reimbursable Code 11 Prei	Activities Codes: paring for the evalua	ition	Evali	uation Crite	ria:		
Code 12 Goa	is and objectives co	inference with instruc	(A) d tor (B) in	listrict stan nstructiona	dards an Ltechnia	id test re	sults tegies
Code 13 Pre-	observation conferences	ence with instructor	(C) a	dherence	to currici	ular obje	ctives
Code 15 Post	-observation confer	ence with instructor	(U) s	uitable lea	rning en	vironme	nt
Code 16 Fina Code 17 Distr	I conference with in		CDOOM TEACH			-	
		t on each criterion (SROOM TEACHI	. i			
each of the f	ollowing evaluatio	n steps:	וטו (ע-א	·	rage Tin	1 .	T
Code 11	Daniel (//			A	В	С	D
Code 11	Preparing for the	evaluation		10	15	15	10
Code 12	Goals and object	ives conference with	instructor	10	15	15	10
Code 13	Pre-observation	conference with instru	uctor	10	15	15	10
Code 14	Classroom obser	vation of instructor	·		10		1,0
	Olassioom obser	vation of instructor		10	15	15	10
	D==4 .1	conference with instr	uctor	10	11	1	11
Code 15	Post-observation	Comorchice With Mist	40101	-1 H	115	116	
				10	15	15	/ _
	Final conference		,	10	15 S	15 15	10
Code 15 Code 16 Code 17			,	10	15	15	10

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY

498/83 The Stull Act (K-12)

PROBATIONARY

Routine Evaluations of Instructors

of

the reimb	ursable activities for the ma	iount of time sp andated prograi	ent (in r m.	ninutes	s) by you	ı to imp	iement (each (
District/0	SD FCPhlu		Pac Depart	· ru	Cocation Cocation Title	n		
331-62 Telepho	ne# Work year le	10mo/hrly ngth(circle)	Fiscal \	/ear: 01-02	97-98 02-03	98-99 03-04 h you are	04-05	00-01 05-06
Code 11 Code 12 Code 13 Code 14 Code 15 Code 16	ble Activities Codes: Preparing for the evaluation Goals and objectives conferen Pre-observation conference w Classroom observation of instr Post-observation conference v Final conference with instructo District reporting	ith instructor ructor vith instructor or	r	Evaluat (A) distr (B) instr (C) adh (D) suitr	ion Criter rict stand ructional erence to able lear	ria: dards and technique o curricu ning env	d test resues/stratellar objectionmen	sults egies ctives it
Allocate each of t	the average time spent on ea ne following evaluation step	ach criterion (A- s:	D) for	•	Aver	age Tim	e in Mir	nutes
			· · · · ·		Α.	В	С	D
Code 11	Preparing for the evalua	ation		·	(Om	10-	lum	lam
Code 12	Goals and objectives co	onference with in	structor		2 h	24	2h	Ph
1								

Code 13 Pre-observation conference with instructor 10n Code 14 Classroom observation of instructor lh 1h Code 15 Post-observation conference with instructor 30 ~ 302 30m Code 16 Final conference with instructor Code 17 District Reporting

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based m son your personal knowledge or information." This information is used for cost accounting purposes only.

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If you have thy cuestions, please contact	Date 0 - / - 07
BY: PLEASE SUBMIT THIS INFORMATION BY; TO _	

Employee AVERAGE Time Record for Mandated Costs PROBATIONARY

498/83 The Stull Act (K-12)

PROBATIONARY

Routine Evaluations of Instructors

Please report below the average amount of time spent (in minutes) by you to impleme	ent each of
the reimbursable activities for the mandated program.	

tije reimbursable ag	ivities for the mandated progra	am.				
Car Spad	USD			A (4		
District/COE	11	Department/I	Locatio	on V allu		
Carolyn	Millikin			/ V 02 00 /		
Employee Name		Exact Position	n Title	;		
						•
	<u> 12mo/11mo/10mo/hrly</u>	Fiscal Year:	97-98	98-99 99-0	00 00-01	
Telephone #	Work year length(circle)			03-04 04-0		i
		Circle the years				
Reimbursable Activities	Codes:		ion Crite			
Code 11 Preparing for	the evaluation			dards and tes	t results	
Code 12 Goals and oil	ojectives conference with instruct			l techniques/s		
	tion conference with instructor	(/		to curricular o		
Code 14 Classroom o				rning environ		
	ation conference with instructor	(2) 5412		Timing Citylion	iiCiit	
Code 16 Final confere						
Code 17 District repor		SROOM TEACHER	TIME IS	NOT REIMBU	RSED	
Allocate the average	time spent on each criterion (rage Time in		7

	average time spent on each criterion (A-D) for	Avei	age Tin	12 12 12 12 12 12 12		
each of the	following evaluation steps:	Α	В	С	D	
Code 11	Preparing for the evaluation					
Code 12	Goals and objectives conference with instructor	15	15	15	15	
Code 13	Pre-observation conference with instructor	12	12	12	12	
Code 14	Classroom observation of instructor	12	12	12	١٦,	
Code 15	Post-observation conference with instructor	12	12	12	ιz	
Code 16	Final conference with instructor	18	/8	18	B	
Code 17	District Reporting					

	EMPLOYEE CERTIFICATION: The State of California requires that scho	ool distri	ict personnel mainta	in a
	record of data for state mandates in order for the district to receive reimb	ourseme	ent. Your signature o	nn this
-	form certifies that you have reported actual data or have provided a goo	d faith e	estimate which you "	certify
James King	form certifies that you have reported actual data or have provided a good of declare under penalty of perjury under the laws of the State of Califo	rnia to b	be true and correct b	based
ll you	on your personal knowledge or information." This information is used for	r cost ac	counting purposes	oniv.
T. AOA	on your personal knowledge or information." This information is used for 15 2001 EASE USE BLUE (MK)		1211	
	Employee Signature	Date	9-24-07	
D1:	Employee Signature // // // // // // If you have any questions, please contact	Date	, at	
	PLEASE SUBMIT THIS INFORMATION BY; TO			
				

1 of 2

Schreine 2B
Carlsbad Uni. School District
498/83 Stull Act - "Permanent" Teacher Evaluations
Fiscal Years: 2006-2007

Time Study

. I'me Study

Purpose: To extrapolate average time spent by administrative staff evaluating permanent teachers. Source: SA 1.7-1-B Average Timesheets. Findings:

			5					*	*Activity Codos	2000							
								2									
			7	τ-			12	· ·			13			i	14		
Schoolsite	Staff	Α	Я	ပ	۵	4	В	ပ	۵	4	<u>B</u>	ပ	۵	4	8	ပ	٥
Aviara Oaks Middle	Marg Watson						-			-	+-				1		
Buena Vista	Jose DeAnda	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5
뿐	Leslie Harden		10			15	15				5	5		5	15	15	10
CHMS	Catina Hancock	20	20	20	20	5	2	5	5	0	0	0	0	45	45	45	45
CVA	Keith Holley	30	30			30	30			5	5			80	80		
Hope	Rich Tubbs	10				ည	5	5	5	5	5	5	5	5	10	10	10
Kelly	Robert Devich	**100	**100	**100	**100	09	09	09	09	45	45	45	45	**420	**420	0	**420
Pacific Rim	Gwenn Adams	15	10	15	10	15	10	15	10	9	10	10	10	10	10		10
:	Steve Ahle	10	10	10	10	**120	**120 *	**120	**120	2	2	5	5	09	09	09	09
Valley	Carolyn Millikin					15	15	15	15	12	12	12	12	12	12	12	12
Averages		17	16	15	13	21	20	20	19	12	11	12	13	31	33	25	25
Summation of criteria B and C	ia B and C		31	 	 	; 	- 6	† 			- 23	 ¦ 	 	 	58		1
Averages to be used		15	30)		20	40		-	12	20			30	55		
	•				*1				H				H				

Conclusion: Findings will go forward to Schedule 1B

'Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor Code 16- Final conference with instructor

Code 17- District reporting

Evaluation Criteria

Criteria A - district standards and test results Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives Criteria D - suitable learning environment **Times were not used to calculate averages

2 of 2

Time Study

Purpose: To extrapolate average time spent by administrative staff evaluating permanent teachers. Source: SA 1.7-1-B Average Timesheets. Findings:

						*	ctivity	*Activity Codes	S				
			ľ	15				16			Γ	_	
Schoolsite	Staff	۷	В	ပ	٥	A	B	ပ	۵	4	M	ပ	٥
Aviara Oaks Middle	Marg Watson			ī									
Buena Vista	Jose DeAnda	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**	**	1,	*
뿔	Leslie Harden	5	15	15	9	5	19	10	5		30		
CHMS	Catina Hancock	10	10	10	9	20	20	20	20	2	5	5	5
CVA	Keith Holley	20	20			70	20						
Hope	Rich Tubbs	2	9	15	2	5	5	10	5	5	5	5	5
(elly	Robert Devich	**100	**100 **100	**100 **100 **200 **200	**100	**200	**200	**200 **200	**200	30	30	30	30
Pacific Rim	Gwenn Adams	10	10	10	10	19	9	10	10				
	Steve Ahle	30	30	30	30								
/alley	Carolyn Millikin	12	12	12	12	18	18	18	18				
Averages		20	22	15	13	21	22	14	12	13	18	13	13
Summation of criteria B and C	ia B and C	; 	· · ·	38		 		36	} 		15	i 	
4verages to be used		20		30		20	6	5			15		
									"				

Conclusion: Findings will go forward to Schedule 1B

*Activity Codes

Code 11. Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor Code 15- Post-observation conference with ins

Code 15- Post-observation conference with instructor Code 16- Final conference with instructor

Code 17- District reporting

Evaluation Criteria

Criteria A - district standards and test results Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives Criteria D - suitable learning environment **Times were not used to calculate averages

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT Routine Evaluations of Instructors

Please report below the average amount of time the reimbursable activities for the mandated pro	e spent (in minutes) by you to implement each gram.	of
District/COE MACA LUNG + EIDA	Department/Location AoM	

Employee Name

S31.(100)
Telephone # Exact Position Title Punaped

Exact Position Title Punaped

Fiscal Year: 97-98 98-99 99-00 00-01

01-02 02-03 03-04 04-05 05-06

Reimbursable Activities Codes:	Circle the years for which you are responding
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor	Evaluation Criteria:

Code 17 District reporting CLASSROOM TEACHER TIME IS NOT REIMBURSED

Allones de	OLASSKOOW TEACH	IER TIME IS	NOT RE	IMBURS	ED
each of the	e average time spent on each criterion (A-D) for following evaluation steps:	Ave	rage Tir	ne in Mi	nutes
		A	В	C	D
Code 11	Preparing for the evaluation	0	6		
Code 12	Goals and objectives conference with instructor	0	0		
Code 13	Pre-observation conference with instructor	0	0		
Code 14	Classroom observation of instructor	0	0		
Code 15	Post-observation conference with instructor	0	0		
Code 16	Final conference with instructor	0			
Code 17	District Reporting	0	0		
		1 1		Į.	į.

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only.

Employee Signature if you have any questions, please contact	Date	[0-(1-07) , at 33/-618
PLEASE SUBMIT THIS INFORMATION BY	 - `	, at, at

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT

Routine Evaluations of Instructors

Read report below the everage amount of time spent (in minutes) by you to implement

	be Arda	Depa	rtment/	Locat	ion			
	Name	Exact	Positio	n Title	Ė		Ć	6-0
Alsohone	A Part A part to the fide of the		V (=UZ	122-03			00-04	
	Paring for the evaluation		EVATUAL	OF WAT	Ch'you o	re respe	nding	? ·
de de la cie	alle and objectives conference with instructor is a conference with instructor is a conference with instructor is a conference with instructor is a conference with instructor is a conference with instructor is a conference with instructor is a conference with instructor	otor	(C) ach	etencia incironi	idards and technical techn	Ues/ell;	entegies	
	EIGI REDURING	SROOM TE	ACHER'	TIME 19	NOT PE	Hitti ine		•
corete the	Average time spent on each criterion (following evaluation steps:	(A-D) for			rage Tir			
500.71	Section 19	:		A	В	C	D	4
6-10	Preparing for the evaluation		·	2.5	2.5	2.5	2.5	-
	Goals and objectives conference with	instructor		2.5	2.5	2.5	 	
6.43	Pre-observation conference with instru	ictor		2.5	2.5	2.5	五五	 _.
	Classroom observation of Instructor		7	.5	12.5	2.5	2.5	
1615	Post-observation conference with instr	uctor		2.5	2.5	2.5	2.5	
	Final conference with instructor	1	- 2	2:5	2.5	2.5	2.5	
	District Reparting		-	1				٣
LOYEE CE	PRIFICATION: The State of College						1	
edere una Sur derecha PLEAS	RTIFICATION: The State of California re of state mandates in order for the district of you have reported actual data or have ler panally of partitury under the laws of the knowledge or information." This information of the laws of the contraction of the laws of the contraction.	provided a	Cond foi	PN πΩΓΙΕ.	TOUR SIG	nature.	ain a on this "certify based only.	(086) T
heve any	upsilbas plesipe contact	·	De	ie .	10/15	701	117	100

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) Routine Evaluations of Instructors PERMANENT

Department/Location Employee Name Exact Position Title 12mo/11mo/10mo/hrly	Dietriot/C							_		
Telephone # Work year length(circle)		JE			Depa	rtment	Locatio	on \mathbb{R}	V	
Of-02 02-03 03-04 04-05 05-06	Employee	Name			Exact	Positio	in Title			0
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District reporting CLASSROOM TEACHER TIME IS NOT REIMBURSED A B C D Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 Preparing for the evaluation Code 18 Pre-observation conference with instructor Code 19 Pre-observation conference with instructor Code 10 Preparing for the evaluation Code 11 Pre-observation conference with instructor Code 12 Final conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor			Work year le	10mo/hrly ngth(circle)		01-02	02-03	03-04	04-05	05-06
Average Time in Minutes A B C D Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor	code 11 Pi code 12 G code 13 Pr code 14 Cl code 15 Pc code 16 Fi code 17 Di	reparing for pals and or pals and or pals and or pals and or pals and or pals and or pals and or pals and or pals and or pals artict reports and or pals and or pals artict reports and or pals artict reports and or pals artict reports and or pals artict reports and or pals artict reports and or pals artict reports and or pals artict reports and or pals artict reports and or pals articles.	r the evaluation bjectives conferention conference with servation of instraction conference vence with instructoting	ith instructor ructor vith instructor r CLASS	tor SROOM TI	(A) dist (B) inst (C) adh (D) suit	rict stand rict stand ructional rerence i able lead	oria: dards an l techniq to curricu rning env	d test re ues/stræ ılar obje ⁄ironmer	esults tegies ctives nt
A B C D Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor	ach of the	e average following	time spent on ea evaluation step	ach critorian (4-D) for	•	1		_	
Gode 12 Goals and objectives conference with instructor Fre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Final conference with instructor	-	<u> </u>			• .		Α	В	C:	. D
Pre-observation conference with instructor I O IO IO Iode 14 Classroom observation of instructor Iode 15 Post-observation conference with instructor Iode 16 Final conference with instructor	ode 11	Prepa	ring for the evalua	ition						
Code 14 Classroom observation of instructor 20 20 20 20 30 4 6 Final conference with instructor 5 5 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	Code 12	Goals	and objectives co	onference with i	nstructor					
code 15 Post-observation conference with instructor ode 16 Final conference with instructor	ode 13	Pre-ol	oservation confere	ence with instru	ctor	-		10	10	10
ode 16 Final conference with instructor	ode 14	Classi	room observation	of instructor				20	20	20
The state of the s	ode 15	Post-c	bservation confer	ence with instru	ıctor			5	5	5
ode 17 District Reporting	ode 16	Final o	onference with ins	structor		-		:		·
	ode 17	Distric	Reporting							
	m certifies declare) u your perso PLEA aplovee Sig	that you h nder penal nal knowle SE USE B	ave reported actuations of perjury under dge or information LUE INK	al data or have	provided	a good f Californi sed for c	aith esti a to be to ost acco	າ our ຣເວ mate wh	Inature (ich you '	on this 'certify
MPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a cord of data for state mandates in order for the district to receive reimbursement. Your signature on this moderation certifies that you have reported actual data or have provided a good faith estimate which you "certify declare) under penalty of perjury under the laws of the State of California to be true and correct based your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK Inployee Signature Date Date	CAOC OLID	MIT THE	INFORMATION B	V		TO		' ~ ~		

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT Routine Evaluations of Instruction

Routine Evaluations of Instructors

Please report below the average amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

1.10	A PARTICIPATION OF MINIMARCH DING	ram.				
District/CC	The March	Departmen	t/Locatio	on	CH	E
Employee	Name X Vac a oc	Exact Posit	iion Title	P	' M 1	you
Telephone	# 12mo/(11mo/10mo/hrly Work year length(circle)	Fiscal Year. 01-0	97-98 2 02 -03	03-04	04-05	00-01 05-06
samureot.	e Activities Codes:	Circle the year	rs for whic	h you an	respon	dina
Code 11 Pr Code 12 Go Code 13 Pr Code 14 Ck Gode 15 Pc Code 16 Fir	eparing for the evaluation pals and objectives conference with instructor e-observation conference with instructor assroom observation of instructor astrobservation conference with instructor all conference with instructor	(A) di ctor (B) in (C) at (D) st	anon crim strict stand structiona dherence d litable lead	inat dards an dechniq to cumici ming env	d test re ues/stra: ılar obje rironmer	esults tegies ctives nt
1	a average time spent on each criterion	SROOM TEACHE				
each of the	following evaluation steps:	(A-D) for	* AVBI	age Tin	ie in Mi	nutes
		,	A	В	C	. D
Code 11	Preparing for the evaluation			10	·	
Gode 12	Goals and objectives conference with	instructor	15	15		
Code 13	Pre-observation conference with instr	uctor	-	c5	5	
Code 14	Classroom observation of instructor		5	15	15	10
Code 15	Post-observation conference with inst	ructor	5	15	/ -	
Code 16	Final conference with instructor		5	10	10	10
Code 17	District Reporting				10	\bigcirc
				<u> 30</u>		
form certifies (or declare) ur on your person PLEA: Employee Sign f you have any	ERTIFICATION: The State of California of for state mandates in order for the district that you have reported actual data or have der penalty of perjury under the laws of the law of the la	provided a good le State of Califor nation is used for	ursement Í faith esti	gie 7007 . Nate whi	nature (on this
רבעטב פחאו	WIT THIS INFORMATION BY	: то		_		

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT

Routine Evaluations of Instructors

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

DISTRICT	Departure Depart	artment	/Locatio	n ·	CH	15
Employe 22	$(1/\sqrt{5})$	t Positi	on Title	PC	inak	al
Telepho	ne # Work year length(circle)	l Year: 01-02	97-98 02-03	03-04	99-00 04-05	00-01 05-06/
Reimburs	able Activities Codes:	the years	for whic	h you ar	e respor	iding \
Code 11 Code 12 Code 13 Code 14 Code 15 Code 16	Preparing for the evaluation Goals and objectives conference with instructor Pre-observation conference with instructor Classroom observation of instructor Post-observation conference with instructor Final conference with instructor District reporting CLASSROOM	(A) dis (B) ins (C) adi (D) sui	tructional nerence t table lear	dards ar techniq to curric ning en	nd test re ues/stra ular obje vironme	itegies ectives nt
Allocate each of 1	the average time spent on each criterion (A-D) for the following evaluation steps:				ne in Mi	
<u> </u>			Α	В	C	. D
Code 11	Preparing for the evaluation		20	20	20	10
Code 12	Goals and objectives conference with instructo	or	5	5	5	5
Code 13	Pre-observation conference with instructor		20	0	-0	0
Code 14	Classroom observation of instructor		45	45	45	45
Code 15	Post-observation conference with instructor		10	10	160	10
Code 16	Final conference with instructor		20	20	10	20
Code 17	District Reporting		5	5	5	5
EMPLOYE	E CERTIFICATION: The State of California requires to ata for state mandates in order for the district to receives that you have reported actual data as have reported.	hat schoo ve reimbu	ol district irsement	personr Your si	el maint gnature	ain a

form certifies that you have reported actual data or have provided a good faith estimate which you "certify on your personal knowledge or information." This information is used for cost accounting purposes only.
Employee Signature Date Da
PLEASE SUBMIT THIS INFORMATION BY; TO
PLEASE USE BLUE INK

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT

Routine Evaluations of Instructors

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD	-			. 1	
District/COE Keith Holley	Department/	Locatio	on CV	A	
Employee Name	Exact Position	on Title	Dir	ecto	Y
Telephone # 12mo/11mo/10mo/hrly Work year length(circle)	Fiscal Year: 01-02 Circle the years	02-03	03-04	04-05	00-01 05-06
Reimbursable Activities Codes:	Circle the years	tor Whic	n you are	respon	ding
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District reporting CLASS	(A) dist or (B) inst (C) adh (D) suit	rict stand ructional nerence t able lear	dards an technique o curricu ning env	ues/strat ılar obje vironmer	tegies ctives nt
3	ROOM TEACHER	TIME IS	NOT REI	MBURSE	ĒD
Allocate the average time spent on each criterion (/each of the following evaluation steps:	\-D) for		age Tin		
		Α	В	С	D
Code 11 Preparing for the evaluation		30	30		
Code 12 Goals and objectives conference with in	nstructor	30	30		
Code 13 Pre-observation conference with instruc	ctor	5	5		
Code 14 Classroom observation of instructor		80	90	-	
Code 15 Post-observation conference with instru	ctor	70	10		
Code 16 Final conference with instructor		70	70		
Code 17 District Reporting					

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify or declare" under penalty of perjury under the laws of the State of California to be true and correct based knowledge or information." This information is used for cost accounting purposes only.

1 1 5 2007

PLEASE SUBMIT THIS INFORMATION BY _____; TO _______; TO ________;

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT

	Name Exact P	nent/Loc osition T	od)		
Telephone	Work year length(circle) Circle the	1-02 02-	03	03-04	04-05	05
Code 11 Pr Code 12 Go Code 13 Pr Code 14 Cla Code 15 Po Code 16 Fir Code 17 Dis	eparing for the evaluation cals and objectives conference with instructor e-observation conference with instructor assroom observation of instructor est-observation conference with instructor hal conference with instructor strict reporting CLASSROOM TEAC	Naturation (A) district s B) instruction C) adheren C) suitable	ctanda onal i nce to learr	ards ar techniq curricu ning en	nd test re jues/stra ular obje vironme	esult Itegie ective nt
Employee Name 3 599 12 12 10 10 10 10 10						
		. /	4	В	C	1.
Code 11	Preparing for the evaluation	11	5			
Code 12	Goals and objectives conference with instructor		5.	5	2	(
Code 13	Pre-observation conference with instructor	<u> </u>	5	5	5	
Code 14	Classroom observation of instructor		5	10		-
Code 15	Post-observation conference with instructor	5	5	10	15	5
Code 16	Final conference with instructor	3	-	5	10	5
Code 17	District Reporting		5	5	5	5
orm certifies or or declare) un	CERTIFICATION: The State of California requires that so for state mandates in order for the district to receive resthat you have reported actual data or have provided a good perjury under the laws of the State of California and knowledge or information." This information is used SEUSE BLUE INK	good faith	ent. estin	Your si nate wh	gnature nich you	on t

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT

Routine Evaluations of Instructors

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

($(2U\mathcal{N})$						
District/	RUBERT DEVICH	Depar	tment/	Locatio	n KE	LLY SCI	10 0 L
• •	ee Name	Exact	Positic	n Title	PRI	nclpi	71
Telepho		Fiscal `	01-02	02-03	03-04	99-00 04-05 e respon	(05-06)
Code 11 Code 12 Code 13 Code 14 Code 15 Code 16	Able Activities Codes: Preparing for the evaluation Goals and objectives conference with instructor Pre-observation conference with instructor Classroom observation of instructor Post-observation conference with instructor Final conference with instructor District reporting CLASS		(A) dist (B) inst (C) adh (D) suit	ion Crite rict stand ructional erence t able lead	ria: dards an techniq to curricu rning en	id test re ues/stra ular obje vironmei	esults tegies ctives nt
Allocate each of t	the average time spent on each criterion (A the following evaluation steps:					ne in Mi	
				Α	В	С	. D
Code 11	Preparing for the evaluation		•	100	100	100	100
Code 12	Goals and objectives conference with i	nstructor		60	60	60	60
Code 13	Pre-observation conference with instruc	ctor		45	45	45	45
Code 14	Classroom observation of instructor			420	420	-	42c
Code 15	Post-observation conference with instru	ıctor		160	100	100	100
Code 16	Final conference with instructor			200	200	200	200
Code 17	District Reporting		·	30	30	30	<u>400</u> 30
EMPLOYE	E CERTIFICATION: The State of California re	quires tha	at schoo	district	personn	el maint	ain a

	form certifies that you have reported actual data or have provided a good faith estimate which you "certify
2	(or declare) under penalty of perjury under the laws of the State of California to be true and correct based
IJ,	(or declare) under penalty of perjury under the laws of the State of California to be true and correct based for California to be true and correct based of the State of California to be true and correct based on the State of California to be true and cor
	PLEASE USE BLUE INK NOV 1 5 2007 Employee Signature
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Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT Routine Evaluations of Instructors

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	e amount of time spent (in minutes) by you to implement each of
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le Activities	Codes:		Circle t	ne years	for whi	ch you a	re respo	nding
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lassroom of	On conterence With In	structor		(C) adh	erence	to curric	ular obie	ectives
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nal conterer	nce with instructor			,			•	•
		CLASSRO	DOM TE	ACHER	TIME IS	NOT RE	IMBURS	ED
e average to following	time spent on each of evaluation steps:	criterion (A-D	O) for	. •				
			·		Α	В	С	D
Prepar	ing for the evaluation		<u>.</u>		<i>1</i> 5	10	15	10
Goals a	and objectives conference	ence with inst	ructor		15	10	15	10
Pre-obs	servation conference	with instructo	r		10	10	10	10
Classro	om observation of ins	structor			10	10	10	10
Post-ob	servation conference	with instructo	or		10	10	10	10
Final co	nference with instruct	for			140			(1)
					10	10	10	10
District i	Reporting				10	10	10	
SERTIFICATION OF THE PROPERTY		125				/	10	
VO 25 46 BINTHONE	Name Name	Name 12mo/11mo/10m Work year length Re Activities Codes: reparing for the evaluation coals and objectives conference with in assroom observation of instructor est-observation conference with in all conference with instructor strict reporting Re average time spent on each e following evaluation steps: Preparing for the evaluation Goals and objectives conference Pre-observation conference Classroom observation of inservation of inservation conference	Name 12mo/11mo/10mo/hrly	Department	Department. Name Name Exact Position 12mo/11mo/10mo/hrly ## Work year length(circle) Preparing for the evaluation Coals and objectives conference with instructor Preparing Preparing CLASSROOM TEACHER Preparing for the evaluation CLASSROOM TEACHER Preparing for the evaluation CLASSROOM TEACHER Preparing for the evaluation Goals and objectives conference with instructor Pre-observation conference with instructor Classroom observation of instructor Pre-observation conference with instructor Classroom observation of instructor Post-observation conference with instructor	Department/Location Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Fiscal Year: 97-98 O1-02 02-03 Circle the years for which instructor (A) district stan (B) instructions (C) adherence Ost-observation conference with instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instruction of instructor Instr	Department/Location Department/Location Exact Position Title Department/Location Exact Position Title Department/Location Exact Position Title Department/Location Exact Position Title Department/Location Exact Position Title Separtment/Location Exact Position Title Fiscal Year: 97-98 98-99 01-02 02-03 03-04 (Circle the years for which you are reparing for the evaluation poals and objectives conference with instructor assroom observation conference with instructor and conference with instructor and conference with instructor particle reporting Exact Position Title Fiscal Year: 97-98 98-99 01-02 02-03 03-04 (Circle the years for which you are reparing for the evaluation Evaluation Criteria: (A) district standards and (B) instructional technic (C) adherence to curric (D) suitable learning en observation conference with instructor CLASSROOM TEACHER TIME IS NOT REPART For a preparing for the evaluation For following evaluation Steps: A B Preparing for the evaluation Pre-observation conference with instructor Classroom observation of instructor Classroom observation of instructor Post-observation conference with instructor Final conference with instructor Final conference with instructor	Department/Location Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Exact Position Title Name Fiscal Year: 97-98 98-99 99-00 01-02 02-03 03-04 04-05 Circle the years for which you are responded to the evaluation of instructor (A) district standards and test for (B) instruction (B) instruction (C) adherence to curricular objectives conference with instructor (C) adherence to curricular objectives to the evaluation of instructor (D) suitable learning environments (C) adherence to curricular objectives to the evaluation (D) suitable learning environments (D) suitable

Employee AVERAGE Time Record for Mandated Costs PERMANENT 498/83 The Stull Act (K-12) PERMANENT

Routine Evaluations of Instructors

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Employ	ee Name Fxact	Cup Position	in Title			
331-6			אווי ווכ	•		
Telepho			97-98	98-99	99-00	00-01
	Circle 4	01-02 he vears	02-03	03-04 h you an	04-05	05-06
Code 11	able Activities Codes: Preparing for the evaluation	Evaluat	tion Crite	ria:		
Code 12	Goals and objectives conference with instructor	(A) dist	rict stan	dards an	id test re	sults
Code 13	Pre-observation conference with instructor	(D) insi	ructiona referce	l techniq to curricı	ues/stra	tegies
Code 14	Classroom observation of instructor	(D) suit	able lea	rning en	vironme:	ctives nf
Code 16	Post-observation conference with instructor Final conference with instructor	•	-	Ū		
Code 17	District reporting CLASSROOM TE	FACHER	TIME IS	NOT DE	Mouse	
Aliocate	the average time spent on each criterion (A-D) for	EAGILIA				
each of	the following evaluation steps:		Ave	rage Tin	ne in Mi	nutes
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Code 11	Preparing for the evaluation					
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Code 12	Goals and objectives conference with instructor			21		71
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Code 13	Pre-observation conference with instructor					
	·		Sm	5m	Sm	5 W
Code 14	Classroom observation of instructor		1	١.	1 1	11
			14	14	lh	lh
Code 15	Post-observation conference with instructor				_	
· ·			N 08	30~	30 V	30m
Code 16	Final conference with instructor					-
Code 17	District Reporting					
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	record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify on your personal Rhowledge or information." This information is used for cost accounting purposes only.
	Nov. 1 DI EACE LINE DUE TO INFORMATION." This information is used for cost accounting purposes only
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5	mployee Signature Yif you have any questions, please contact Date 0 - (- 0 7

PLEASE SUBMIT THIS INFORMATION BY

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PERMANENT 498/83 The Stull Act (K-12) PERMANENT Routine Evaluations of Instructors

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/CC	DE CUSO Carolina Millikin	Department/	Locatio	on Off	ice V	ially t
Telephone Reimbursable Code 11 Pro Code 12 Go Code 13 Pro Code 14 Cla Code 15 Po	e Activities Codes: eparing for the evaluation pals and objectives conference with instructor e-observation conference with instructor assroom observation of instructor ost-observation conference with instructor	Exact Position Fiscal Year: 01-02 Circle the years Evaluat (A) distribution (B) instribution (C) adh	97-98 02-03 for which crites standard crites standard crites continuation and	98-99 03-04 th you are tria: dards and techniq to curricu	Dpal 99-00 04-05	00-01 05-06 ding sults tegies
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each of the	following evaluation steps:	•	A	В	C	D
Code 11	Preparing for the evaluation					
Code 12	Goals and objectives conference wit	th instructor	15	15	15	15
Code 13	Pre-observation conference with ins	tructor	12	12	12	12
Code 14	Classroom observation of instructor		(2	12	12	(,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
Code 15	Post-observation conference with ins	structor	12	12	12	12.
				"	1	
Code 16	Final conference with instructor		18	18	18	18

record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify on your personal knowledge or information," This information is used for cost accounting purposes only.

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Employee Signature By. If you have any questions, please contact	Date 9-24-07
PLEASE SUBMIT THIS INFORMATION BY; TO	

1 of 2

Fiscal Years: 2006-2007 Time Study

Purpose: To extrapolate average time spent by administrative staff evaluating temporary teachers.

Source: SA 1.7-1-C Average Timesheets.

Findings:

								*Ac	*Activity Codes	Code	(6)						
			1	1			12	2			13	3		٠,	14		
Schoolsite	Staff	٨	മ	၁	Q	٧	8	ပ	Ω	4	В	ပ	۵	4	8	ပ	۵
Aviara Oaks Middle	Marg Watson	**480	**480			**360 **480	**480			**360	*360			***600	009**		
Buena Vista	Jose DeAnda	**2.5	**2.5	**2.5	**2.5	**5	**5	**5	**5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5
CVE	Leslie Harden		10			15	15				ıçı	5		5	15	15	10
CHMS	Catina Hancock	40	40	40	40	5	2	5	5					09	09	09	09
CVA	Keith Holley	30	30			30	30			5	5		-	**195	**195		
Hope	Rich Tubbs	10				5	5	5	5	5	10	10	5	5	15	15	10
Kelly	Robert Devich	09	30	30	30	30	30	30	30		30	30		10	20	10	30
Pacific Rim	Gwenn Adams	10	15	40	40	10	15	30	တ္တ	9	15	30	30	10	15	30	30
	Steve Ahle	10	10	10	10	**120 **120	_	**120	**120	S	5	5	5	09	09	09	09
Valley	Carolyn Millikin					15	15	15	15	12	12	12	12	12	12	12	12
	J. Cesar Morales					ည	25	25	2	10	25	25	10	10	20	20	20
Averages		27	23	30	30	14	18	18	15	80	13	17	12	22	27	28	29
Summation of criteria B and C	ia B and C		53	3		! ! 	36	}	<u>' </u>	: !	- 	; 	-	 	55	; ;]
Averages to be used		25	50)		14	35			8	30			20	55		
					.1				11				11				

Conclusion: Findings will go forward to Schedule 1A. Average not used.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

Evaluation Criteria

Criteria A - district standards and test results Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives

Criteria D - suitable learning environment

**Times were not used to calculate averages

2 of 2

498/83 Stull Act - "Temporary" Teacher Evaluations Carlsbad Unified School District Fiscal Years: 2006-2007 Scheade 2C Time Study

Purpose: To extrapolate average time spent by administrative staff evaluating temporary teachers. Source: SA 1.7-1-C Average Timesheets. Findings:

						*	ctivity	*Activity Codes	Si		-		
			7-	15				16			-	17	
Schoolsite	Staff	۷	В	၁	Q	۷	8	ပ	۵	4	В	ပ	۵
Aviara Oaks Middle	Marg Watson	**720	**720 **720			06**	06**			06**	06**		
a Vista	Jose DeAnda	**2.5	**2.5	**2.5	**2.5		**2.5 **2.5	**2.5	**2.5	**1	**	**	**
	Leslie Harden	5	15	15	10	2	10	10	2		30		
S	Catina Hancock	20	20	20	20	40	40	40	40	5	5	5	5
	Keith Holley	**150	**150			02**	02**			15			
Норе	Rich Tubbs	5	10	10	10	5	3	5	5	10	10	10	10
	Robert Devich	10	9	10	10	15	15	15	15	10	10	10	9
Pacific Rim	Gwenn Adams	10	15	30	30	10	15	15	15				
	Steve Ahle	30	30	30	30								
Valley	Carolyn Millikin	12	12	12	12	18	18	18	18				
Rio Seco	Cheryl Bowen	10	25	25	10	15	15	15	15	25	40	35	20
Averages		13	17	19	17	15	17	17	16	13	19	15	=
Summation of criteria	B and C		3	36		; 	 - 	34	 - -	<u> </u>	16		
Averages to be used		13	3	35		15	8	30			15	i 	

Conclusion: Findings will go forward to Schedule 1A.

*Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor Final conference with instructor Code 16-

Code 17- District reporting

Evaluation Criteria

Criteria B - instructional techniques/strategies Criteria C - adherence to curricular objectives Criteria A - district standards and test results Criteria D - suitable learning environment **Times were not used to calculate averages

Employee AVERAGE Time Record for Mandated Costs TEMPORARY 498/83 The Stull Act (K-12) TEMPORARY

Routine Evaluations of Instructors

Please report below the average amo	ount of time anant G	N. 1
the reimbursable activities for the mar	sure of mine sperit (in minute	es) by you to implement each of
the remoursable activities for the mai	ndated program	7 7 7 The milesofficial Cool of
	Piogrania.	

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District/C	OE 1 / G	watson	Depa	rtment/	Locati	on //	for	1
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33/1	$\mathcal{L}(\Omega)$	10000144			וונופ		Uni	PPC
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Code 11 P	reparing for	the evaluation		(A) diet	ion Crite	<u>eria:</u>		
Code 12 G	oals and ol	ojectives conference with instruct	tor	(B) inst	ructions	uaius an I toobaie	id test re ues/stra	Sults
Code 13 P	re-observat	ion conference with instructor	•	(C) adh	erence	to curriou	ues/stra ular obje	tegies
Code 14 C	lassroom o	bservation of instructor		(D) suit	able lea	mina en	vironme:	Clives
Code 15 P	ost-observa	ation conference with instructor		(=) = = :		······································	'ii Oillilet	IL,
Code 15 F	inal contere	ence with instructor		-				
	istrict repor		ROOM TE	EACHER	TIME IS	NOT RE	MBURS	ED
Allocate the	ne average e following	time spent on each criterion (A	4-D) for		Į.		ne in Mi	
					Α	B	C	D
Code 11	Prepa	ring for the evaluation			480	480		,
Code 12	Goals	and objectives conference with i	nstructor		360	480		
Code 13	Pre-ob	oservation conference with instru	ctor		360			
Code 14	Classr	oom observation of instructor			000	600		
Code 15	Post-o	bservation conference with instru	ictor		720	720		
Code 16	Final c	onference with instructor			90	90		
Code 17	District	Reporting			90	90		
							1	1

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature If you have any questions, please contact	Date	16-11-07 , at 331-610
PLEASE SUBMIT THIS INFORMATION BY; TO		, at <u></u> , at

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Employee AVERAGE Time Record for Mandated Costs FEMPORARY 498/83 The Stull Act (K-12) TEMPORARY Routine Evaluations of instructors

Please report below the average amount of time spent (in minutes) by you to implement each of

	» E	Departme	nt/Locat	ion	•	
Employes		Exact Pos				
Telephone	12mo/11mo/10mo/hrly Work year length(circle)	Fiecal Year 01-0 Oirola the year	מת_כח ענ	ነ ለቁ ለፈ	1 64 5-	
Code 12 Code 13 From Code 15 From 15 From Code 15 From Code 15 From Code 17 Co	Spaing for the evaluation pals and objectives conference with instruct conference with instructor assistant observation of instructor assistant observation of instructor assistant observation of instructor assistant observation of instructor assistant observation assistant observation conference with instructor assistant observation conference observati	(A) d or (B) ir (C) a (D) s	letrict star istructions idherence ultable les	enu: idarde a il techni to curic iming er	nd test r ques/str cular obje vironme	esults Ategies ectives Ant
Mach of the	average time apent on each criterion (A following evaluation eteps:	(-D) for			me in M	
Gede 11	Preparing for the evaluation.		A	B	C	Þ
		<u> </u>	25	2.5	2.5	2.5
Code 12	Goals and objectives conference with in	etructor	6	5	6	1
Soul: 12	Pre-observation conference with instruc	tor	-	7.6	7.5	2,75
Code 14	Classroom observation of instructor		2.5			
Code 18	Post-observation conference with instruc	tor	1	12.5	4:5	2.5
700s (18	Final contenence with Instructor		25	25.5	2.5	2.5
5da 17	District Reporting		2.5	2.5	2.5	z-5
to The state of th	RTIFICATION: The State of California rest			11	11	1

MPROYEE CERTIFICATION: The State of California requires that school district personnel maintain a decorate of state for state mandates in order for the district to receive reimburgement. Your signature on this cartifice that you have reported actual data or have provided a good faith estimate which you "certify inder penalty of partiry under the laws of the State of California to be true and correct based and recorded at information." This information is used for cost accounting purposes only.

Employee Signature (etc.) Date 1012-1071/7	
Date Date	O
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Employee AVERAGE Time Record for Mandated Costs IPORARY 498/83 The Stull Act (K-12) TEMPORA Routine Evaluations of Instructors TEMPORARY TEMPORARY

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-observation conf	ierėnės villi isota.	ictor	4	ورسي راط	abie 163	Ming env	/ironmei	At,
i conterence with	instructor					•		
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Classroom obse	ervation of instruc	bor	F	1	1			
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Post-observation	n conference with	<u>in</u> structo	or .	1		1		· · · · · · · ·
		~ ·	Y	10	5	15	. i	
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Final conference	with instructor	<u> </u>	<u> </u>			1.5	_5	-IC
Final conference	with instructor	20 30	mi	N.	5		-5	- <i>IC</i>
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Employee AVERAGE Time Record for Mandated Costs TEMPORARY 498/83 The Stull Act (K-12) **TEMPORARY**

Routine Evaluations of Instructors

Please report below the average amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

Department/Location

Exact Position Title

District/CC

= 77	Y 10 () 12mo/11mo/10mo/hrly Fiscal Yea	аг:	97-98	98-99	99-00	00-01
Telepho	or griden of	-02	02-03	03-04	04-05	05-06
Reimhure	Circle the y	ears f	for whic	h you are	erespon	ding
Code 11	Daniel Codes	aluati	on Crite	ria:		
Code 12	Cools and altitude of the second of the seco) distr	ict stand	dards an	d test re	sults
Code 13	Oro observation and the control of t) instr	uctiona	l techniq	ues/stra	tegies
Code 14	Clangram who amounts to) adhe	erence i	to curricu	ılar obje	ctives
Code 15	Post-observation conference with instructor) suite	ible lear	ming env	vironme	at:
Code 16	Final conference with instructor			•		
Code 17	District reporting CLASSROOM TEAC	HED.	TIME IC	NOT DE	BADUDO:	- -
l.		ZIILK				
each of t	the average time spent on each criterion (A-D) for he following evaluation steps:		Ave	rage Tin	ne in Mi	nutes
ļ			Α	В	С	D
Code 11	Preparing for the evaluation		1 .			† ,
•	•	4	40	40	40	140
Code 12				170	10	100
Code 12	Goals and objectives conference with instructor	,	،سنر	سر ا	ا نه ا	·
			5	15	15	15
Code 13	Pre-observation conference with instructor		sIΝ.	1		
			Aly			
Code 14	Classroom observation of instructor				•	
JOUC 14	Classicotti observation of instructor	·	100	Y 162	100	1 mg
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Code 15	Post-observation conference with instructor	L	M	1995	- AT	
			D	200	20	(A)
Code 16	Final conference with instructor	- 4				
	i mai conterence with instructor	۱ /	111	40	40	110
			70	40	40	40
Code 17	District Reporting			~		ri-
			5	5	5	5
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MPLOYE	E CERTIFICATION: The State of California requires that s	chool	district	nereonn	el main	oin a
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(or declare) under penalty of perjury under the laws of the State of California to be true and correct based on your personal knowledge or information." This information is used for cost accounting purposes only.

PLEASE USE BLUE INK

Employee Signature
If you have any questions, please contact

PLEASE SUBMIT THIS INFORMATION BY

Employee AVERAGE Time Record for Mandated Costs TEMPORARY 498/83 The Stull Act (K-12) TEMPORARY

Routine Evaluations of Instructors

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE Employee N 331-53-1 Telephone #	ame 12mo/11mo/10mo/hrly	Departn Exact P Fiscal Ye	ositio ear: 11-02	n Title 97-98 02-03	D; v 98-99 03-04	₽ 99-00 04-05	00-01 05-06	
Reimbursable A	Activities Codes:	Circle the	years	for whic	n you are	respon	ding	
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District reporting CLASSROOM TEACHER TIME IS NOT REIMBURSED								
Allocate the a	verage time spent on each criterion (A bllowing evaluation steps:	-D) for		Aver	age Tim	e in Mii	nutes	
- Cach of the 10	mownig evaluation steps:			Α	В	С	D	
Code 11	Preparing for the evaluation	•		30	30			
Code 12	Goals and objectives conference with in	nstructor		30 30	30			
Code 13	Pre-observation conference with instruc	otor		Si's	5:		-	
Code 14	Classroom observation of instructor			195 min	195 mir		-	
Code 15	Post-observation conference with instru	etor		Din	150 min			
Code 16	Final conference with instructor			10 _{mi} 1	15m2			
Code 17	District Reporting			15				
	•							

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based your personal knowledge or information." This information is used for cost accounting purposes only.

	Employee7Signature If you have any questions, please contact Contact C	Date 9-27-07
BY:	PLEASE SUBMIT THIS INFORMATION BY; TO	

Employee AVERAGE Time Record for Mandated Costs TEMPORARY 498/83 The Stull Act (K-12) TEMPORARY

Routine Evaluations of Instructors

Please report below the **average** amount of time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

DISTRICTO	Riche & Tubbs	Depai	tment/	Locatio	n .			
Employee		Exact	Positio	on Title				
33.1 S.9 Telephone	# Work year length(circle	· ·	01-02	97-98 02-03 for whic	03-04		00-01 05-06	06/0
Code 11 Pro Code 12 Go Code 13 Pro Code 14 Cla Code 15 Po Code 16 Fir	e Activities Codes: eparing for the evaluation pals and objectives conference with instrector e-observation conference with instructor est-observation conference with instructor est-observation conference with instructor eal conference with instructor estrict reporting CL	uctor	(A) dist (B) inst (C) adh (D) suit	rict stand rict stand ructional nerence t table lear	ria: dards an techniq o currici ning en	id test re ues/stra ular obje vironme	esults tegies ectives nt	
Allocate the	e average time spent on each criterio					ne in Mi]
each of the	following evaluation steps:		·	Α	В	C	D	
Code 11	Preparing for the evaluation			10				
Code 12	Goals and objectives conference w	ith instructor		5	5	5	5	
Code 13	Pre-observation conference with ins	structor		5	10	10	5	
Code 14	Classroom observation of instructor	-		5	i 5	15	10	-
Code 15	Post-observation conference with in	structor		5	10	10	10	
Code 16	Final conference with instructor			5	5	5	5	
				1	T		1	7

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	Employee Stignature during the	Date	9/24/07	
<u>-</u> ر	If you have any questions, please contact		, at	
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record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify

Employee AVERAGE Time Record for Mandated Costs 498/83 The Stull Act (K-12) **TEMPORARY**

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TEMPORARY

Routine Evaluations of Instructors

Please report below the average amount of	time spent (in minutes) by you to implement each of
the reimbursable activities for the mandated	program.

District/COE	Department/l	_ocatio	n ver	LY SCH	lool
Employee Name 12mo/11mo/10mo/hrly Telephone # 12mo/11mo/10mo/hrly Work year length(circle) Reimbursable Activities Codes: Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor	Exact Positio Fiscal Year: 01-02 Circle the years Evaluati (A) distr	97-98 02-03 for which ion Criter ict stand ructional erence t	98-99 03-04 n you are ria: lards an technique o curricu	99-00 04-05 e respond d test re ues/strat	00-01 05-06 ding sults regies ctives
Code 17 District reporting CLAS	SROOM TEACHER	TIME IS	NOT REI	MBURSE	ED .
Allocate the average time spent on each criterion (each of the following evaluation steps:	A-D) for	Aver	age Tin	e in Mi	nutes
oran of the following evaluation steps.		A	В	С	D
Code 11 Preparing for the evaluation		60	30	30	30
Code 12 Goals and objectives conference with	instructor	30	30	30	30
Code 13 Pre-observation conference with instru	uctor		30	30	
Code 14 Classroom observation of instructor		10	20	10	30
Code 15 Post-observation conference with inst	ructor	10	10	10	10
Code 16 Final conference with instructor		15	15	15	15
Code 17 District Reporting		10	10	10	10

EMPLOYEE CERTIFICATION: The State of California requires that school district personnel maintain a record of data for state mandates in order for the district to receive reimbursement. Your signature on this form certifies that you have reported actual data or have provided a good faith estimate which you "certify (or declare) under penalty of perjury under the laws of the State of California to be true and correct based on our personal impowledge or information." This information is used for cost accounting purposes only.

MOV 1 Signature		/-	1	Date 10-10-1	_
If you have any questions, please contact	*			, at	1
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Employee AVERAGE Time Record for Mandated Costs TEMPORARY 498/83 The Stull Act (K-12) **TEMPORARY**

	Routine Evalua	ations of Instruc	tors				
Please rep	ort below the average amount of the readle activities for the mandated p	ime spent (in minute	s) by yo	ou to imp	olement	each o	f
/ I	Ishad Unition	ologram.		•.			
District/CO		Department	/Locati	on Po	cific	Din	À
	enn Adams	•			_	1	
Employee	Name	Exact Position	on Title	, ∰,	Princ	ipal	
Telephone	2200 12mg/11mg/10mg/hr	T .			99-00	00-01	
		DIE) 01-02 Circle the years	02-03	03-04 ch vou ar	04-05	05-06	ל
Code 11 Pr	le Activities Codes: eparing for the evaluation	Evalua	tion Crite	эпа:		•	=
Code 12 Go	pals and objectives conference with in-	(A) dist	rict stan	dards ar	nd test re	sults	
Code 13 Pr	e-observation conference with instruct	, ,	ructions	ii techniq to currici	lues/stra ular obje	tegies	
Code 14 Cla	assroom observation of instructor	(P) suit	able lea	ming en	vironme:	nt.	•
Code 15 Pc	ost-observation conference with instruction and conference with instructor	otor				• • • • • • • • • • • • • • • • • • • •	
Code 17 Di	_4_5_4	LASSROOM TEACHER	TIME IC	NOT DE	Manune		eso
Allocate th	e average time spent on each criter	ion (A-D) for	1 2				1
each of the	following evaluation steps:	וטוו (ת-ט) וטו	Ave	rage i in	ne in Mi	nutes	4
		<u> </u>	A	В	С	D	_
Code 11	Preparing for the evaluation	•	10	15	40	40	
Code 12	Goals and objectives conference	with instruct	10		1.0	170	
		with instructor	110	15	30	3	
Code 13	Pre-observation conference with i	nstructor	10	ب	200		1
			10	15	30	30	
Code 14	Classroom observation of instruct	or	10	15	30	30	
Code 15	David I.		110	10		, , ,	
Code 15	Post-observation conference with	instructor	10	15	30	30	:
Code 16	Final conference with instructor		10				
0000 10	rinal conference with instructor		10	-)5	15	15	
Code 17	District Reporting						
	District Neporting	· :			0	\bigcirc	
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EMPLOYEE (DERTIFICATION: The State of Californ	nia requires that school	l district	personn	el maint	ain a	
or declare) ui	nder penalty of periuny under the laws	of the State of Calif	faith est	imate wh	nich you	"certify	
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Employee AVERAGE Time Record for Mandated Costs TEMPORARY 498/83 The Stull Act (K-12)

	Routine F	Evaluations	of Inchair	·	LIVIP	JRAR	. I
Please repo	ort below the average amou	-valuations		TOLS			
the reimbur	ort below the average amousable activities for the mand	dated program	nt (in minute i.	s) by yo	u to imp	lement	each of
District/CC	<u> </u>		Pach			•	
			Department	/Locatio	n		•
Stur	Ithle		Bring	ingu)		
Employee	Name		Exact Position				
331-67	204		-2001 0311				
	<u> </u>	<u>mo/hrly</u> F	iscal Year:	97-98	98-99	99-00	00-01
Telephone	# Work year leng		01-02	02-03	03-04	04-05	05-06
Reimbursable	e Activities Codes:		ircle the years	for which	h you are	respon	ding
Code 11 Pre	eparing for the evaluation		Evalua	tion Crite	ria:		
Code 12 Go	als and objectives conference	with instructor	(A) dis	trict stand	dards and	d test re	sults
Code 13 Pre	e-observation conference with	instructor	(C) adi	tructiona nerence t	i techniqi	les/strat	egies
Code 14 Cla	assroom observation of instruc	tor	(D) sui	table lea	mina env	ironmer	JUVES of
Code 15 Po	st-observation conference with	instructor	, , , , , , , , , , , , , , , , , , , ,		9 0,11	Official	••,
Code 16 Fin	al conference with instructor		•				
	strict reporting	CLASSRO	OM TEACHER	TIME IS	NOT REI	MBURSE	D .
Allocate the	average time spent on each	rcriterion (A-D) for	Ave	rage Tim	e in Mi	nutes
each of the	following evaluation steps:						T -
				A	В	С	D
Code 11	Preparing for the evaluation	n	•		',		
			<u> </u>	100	10-	رم	١٥٦
Code 12	Goals and objectives confi	erence with inst	ructor				
<u> </u>			. 40101	12h	2h	Zh	2h
Code 13	Pre-observation conference			 			
	r re-observation comerend	e with instructo	r	5-	5	500	5
				1	- 4	3 ~	
Code 14	Classroom observation of	instructor		111	11.	1.1	11
	:			11K	14	1h	14
Code 15	Post-observation conferen	ce with instructo	NF				
) i	30 m	30-	30m	30 m
Code 16	Final						
Code 16	Final conference with instri	uctor]	,		
	·	·				. 1	
Code 17	District Reporting		•			1	
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MPLOYEE C	CERTIFICATION: The State of	California requi	res that school	ol district	personne	el maint	ain o
	preparalty of perjury under the half th						
··) - ·· P91001	SE USE BLUE INK		on is used for	cost acco	unting p	urposes	only.
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you have an	nature y questions, please contast			Date	10 -	•	
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LEASE SUBI	MIT THIS INFORMATION BY		; TO				

### Employee AVERAGE Time Record for Mandated Costs TEMPORARY 498/83 The Stull Act (K-12) TEMPORARY

		Routine E	=valuation	s of in	struc	tors			
Please repo	ort below	the average amou	unt of time si	nent (in	minute	s) by yo	u to imp	lement	each of
the reimbur	sable act	ivities for the man	dated progra	ım.			. •	,	
Carls	had	しらい					1/	1/2	N/C
District/CC	E	. 1	<u> </u>	Depai	tment	/Locatio	$_{\rm in}$ $V_{\rm A}$	rieg	- M.
1000	1110	Millik	$\hat{c}$					\	$\Lambda$
Employee	Name	1 /1/(01)	( ,	Evant	Donitie	on Tille	( · 7	),,,,	A : Da
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331-3	200	<u> 12mo/1/1m/b/10</u>	<u>)mo/hrly</u>	Fiscal	Year:	97-98	98-99	99-00	00-01
reiepnone	#	Work year leng	jth(circle)		01-02	02-03	03-04	04-05	05-06
Reimbursable	e Activities	Codes:	<u> </u>	Circle t	he years	for whic	h you ar	e respon	ding
Code 11 Pre	eparing for	the evaluation						d tost to	oulto
Code 12 Go	als and ob	bjectives conference	with instructor	or	(B) inst	tructional	technia	u test re ues/strat	teales
Code 13 Pre	∍-observat	ion conference with	instructor		(C) adh	nerence i	o currici	ılar obje	ctives
Code 15 Po	st-oheens	bservation of instruc	otor		(D) sui	table lear	ning en	/ironmer	nt,
Code 16 Fin	al confere	ince with instructor	i instructor						
Code 17 Dis	strict repor	ting	CLASS	ROOM TI	EACHER	TIME IS	NOT RE	MRIIDOI	=n
Allocate the	average	time spent on eac				'			
each of the	following	evaluation steps:	ii Criterion (A	וטן נט-		Ave	rage Tin	ne in Mi	nutes
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Code 11	Prepa	ring for the evaluation	On				-		
		· · · ·	J11.	•		1			,
Code 12	Coolo						<del> </del>	<del> </del>	ļ
Code 12	Goals	and objectives con	rerence with in	nstructor		15	15	15	15
	<del></del>				<u>·</u>	ļ.,			
Code 13	Pre-ol	oservation conferen	ce with instruc	ctor		17	17-	12	12
	<del></del> -	· · · · · · · · · · · · · · · · · · ·						· .	
Code 14	Classi	room observation of	instructor			12	12	17.	12
	_	•				1			
						45	45	45	45
Code 15	Post-c	hservation conferer	ace with instru	oto v		45	43	43	
Code 15	Post-c	observation conferer	nce with instru	ctor		12	12	12	12
	· 			ctor		12	12.	43	
Code 15	· 	observation conferer		ctor		12	12.	12	12
Code 16	Final c	conference with instr		ctor			43	43	
	Final c			ctor			12.	12	12
· ·	Employee  33 1-5  Telephone  Reimbursable Code 11 Pre Code 12 Go Code 13 Pre Code 15 Po Code 16 Fin Code 17 Dis  Allocate the each of the  Code 12  Code 13	Employee Name  331-5300  Telephone #  Reimbursable Activities Code 11 Preparing for Code 12 Goals and obt Code 14 Classroom of Code 15 Post-observat Code 16 Final confere Code 17 District report  Allocate the average each of the following  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  Code 11 Preparing  C	Please report below the average amount the reimbursable activities for the manual Strict/COE  Employee Name  33 1- 5300  Telephone #  Reimbursable Activities Codes: Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with Code 14 Classroom observation conference with Code 15 Post-observation conference with Code 16 Final conference with instructor Code 17 District reporting  Allocate the average time spent on eac each of the following evaluation steps:  Code 11 Preparing for the evaluation  Code 12 Goals and objectives conference  Code 13 Pre-observation conference  Code 14 Preparing for the evaluation  Code 15 Post-observation conference with instructor  Code 16 Final conference with instructor  Code 17 District reporting  Allocate the average time spent on eac each of the following evaluation steps:  Code 11 Preparing for the evaluation  Code 12 Goals and objectives conference  Code 13 Pre-observation conference  Code 13 Pre-observation conference  Code 13 Pre-observation conference  Code 13 Pre-observation conference	Please report below the average amount of time sy the reimbursable activities for the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated progration of the mandated prograt	Please report below the average amount of time spent (in the reimbursable activities for the mandated program.  District/COE  Department	Please report below the average amount of time spent (in minute the reimbursable activities for the mandated program.  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Department  Departm	Department/Location  Department/Location  Department/Location  Department/Location  Department/Location  Department/Location  Department/Location  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Prevalled  Prevalled  Exact Position Title  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Code 12 Posonom Facher:  Evaluation Crite  (A) district stant  (B) instructional  (C) adherence to (D) suitable lead  (C) atherence to (D) suitable lead  Code 15 Post-observation conference with instructor  Code 16 Final conference with instructor  Code 17 District reporting  CLASSROOM TEACHER TIME IS  Averaged  Averaged  Averaged the evaluation  Code 11 Preparing for the evaluation  Code 12 Goals and objectives conference with instructor  Code 13 Pre-observation conference with instructor	Please report below the average amount of time spent (in minutes) by you to impose reimbursable activities for the mandated program.  Department/Location  Exact Position Title  Department/Location  Exact Position Title  Telephone #	Please report below the average amount of time spent (in minutes) by you to implement the reimbursable activities for the mandated program.  Department/Location  Employee Name  33   - 93   2   12mo/11mo/10mo/hrly  Telephone # Work year length(circle)  Reimbursable Activities Codes:  Code 11 Preparing for the evaluation  Code 12 Goals and objectives conference with instructor  Code 13 Pre-observation conference with instructor  Code 16 Final conference with instructor  Code 17 District reporting  Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:  Code 11 Preparing for the evaluation  Code 12 Goals and objectives conference with instructor  Code 13 Pre-observation conference with instructor  Code 14 Classroom observation of instructor  Code 15 Post-observation conference with instructor  Code 16 Final conference with instructor  Code 17 District reporting  CLASSROOM TEACHER TIME IS NOT REIMBURSI  A B C  Code 11 Preparing for the evaluation  Code 12 Goals and objectives conference with instructor  Code 13 Pre-observation conference with instructor  Code 14 Preparing for the evaluation  Code 15 Post-observation conference with instructor  Code 16 Final conference with instructor  Code 17 District reporting  CLASSROOM TEACHER TIME IS NOT REIMBURSI  A B C  Code 11 Preparing for the evaluation  Code 12 Goals and objectives conference with instructor  Code 13 Pre-observation conference with instructor  Code 14 Preparing for the evaluation

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### **Employee AVERAGE Time Record for Mandated Costs** TEMPORARY 498/83 The Stull Act (K-12) **TEMPORARY**

Routine Evaluations of Instructors

Please report below the <b>average</b> amount of time spent (in minutes) by you the reimbursable activities for the mandated	to implement each of
the reimbursable activities for the mandated program.	to implement each of
mariaatoa programi,	

the reimbursable activities for the mandated pro	ogram.			•	t each of
District/COE  CEra Morals  Employee Name	Department				
=mployee Name	Exact Positi	on Title	Ass	11 fail	Prince
760-731-5385 12mo/11mo/10mo/hrly Telephone # Work year length(circle	Fiscal Year: e) 01-02	97-98 2 02-03	98-99 03-04	99-00 04-05	00-01/ 05-06
Code 11 Preparing for the evaluation Code 12 Goals and objectives conference with instructor Code 13 Pre-observation conference with instructor Code 14 Classroom observation of instructor Code 15 Post-observation conference with instructor Code 16 Final conference with instructor Code 17 District reporting  CLA	(A) dis ructor (B) ins (C) ad	ation Critistrict star structions therence itable les	eria: idards a il technic to curric irning er	nd test re ques/stra cular obje nvironme	esults ategies ectives int
Allocate the average time spent on each criterio each of the following evaluation steps:	n (A-D) for	1		me in M	
each of the following evaluation steps:	· 	Α	В	С	D
Code 11 Preparing for the evaluation					
Code 12 Goals and objectives conference w	ith instructor	5	25	21	5
Code 13 Pre-observation conference with ins	structor	10	25	25	10
Code 14 Classroom observation of instructor		10	20	20	20
Code 15 Post-observation conference with in	structor	10	25	25	10
Code 16 Final conference with instructor		15	15	15	15
				+	<del></del>

PLEASE SUBMITWHIS INFORMATION BY _____; TO _____;

# xTen and Associates

# MANDATE REIMBURSEMENT SERVICES

		Fisca	Fiscal Years:
Name	Title	02-06	20-90
(J. CEMV Movales)	AVERAGE VICE-PRINCIPAL	\$ 53.49	\$ 64.57
	SUBSTITUTE TEACHER (DAILY RATE WITH BENEFITS)	\$ 85.00	\$ 85.00
AAKER, CHARLES	DIRECTOR-MAINT/OPERATIONS	\$ 59.32	\$ 64.78
ADAMS, GWEN	ASSISTANT PRINCIPAL	\$ 57.89	\$ 60.21
AGRAMONTE, DENISE	ADMINISTRATIVE ASSISTANT	\$ 26.31	\$ 29.01
AHLE, STEPHEN	PRINCIPAL - PACIFIC	\$ 73.27	\$ 76.21
ARMSTRONG, THERESA	ASSISTANT PRINCIPAL	\$ 59.61	\$ 56.80
ASHTON, BRIAN	COUNSELOR	\$ 58.46	\$ 62.21
BAIMA, LANE	PHYSICAL PERFORMANCE TEST COORDINATOR (TEACHER)		\$ 34.82
BEESON, JULIE	CAMPUS SUPERVISOR	\$ 15.38	LEFT DISTRICT
BLOOMQUIST, THOMAS	ASSISTANT PRINCIPAL	\$ 66.30	\$ 68.95
BOLING, JEAN MARIE	ADMINISTRATIVE SECRETARY	\$ 32.84	\$ 33.17
BOSS, VICTORIA	LIBRARY TECHNICIAN	\$ 19.64	\$ 19.83
BURNS, KRIS	ACCOUNTING MANAGER	\$ 42.71	LEFT DISTRICT
CAMPBELLLAHR, BETTY J	SPECIAL PROJECTS COORDINATOR	\$ 18.95	\$ 20.30
CHIRICHETTI, DONNA	HEALTH TECHNICIAN	\$ 23.91	\$ 24.15
CHRISMAN, KARL ROBERT	PRINCIPAL - HOPE	\$ 62.79	LEFT DISTRICT
CHRISTIAN, MARY	ADMINISTRATIVE ASSISTANT	\$ 26.24	\$ 27.31
CISNEROS, LAURA	OFFICE ASSISTANT	\$ 19.64	\$ 11.46

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# Sixt and Associates

# MANDATE REIMBURSEMENT SERVICES

Name	Title	Fisca	Fiscal Years:
CONNALLY, KATHY	LIBRARY TECHNICIAN	\$ 21.68	s
CONROY, LYNN	HEALTH TECHNICIAN	\$ 22.77	\$ 24.15
CORDELL, RON	COUNSELOR	\$ 59.47	\$ 65.19
DAGY, DINA	GUIDANCE TECH	\$ 17.84	\$ 18.92
DANIELS, CANDICE	ADMIN SECRETARY	\$ 24.48	\$ 25.96
DAVILA, VERA	OFFICE ASSISTANT	\$ 21.65	€
De ANDA, JOSE	PRINCIPAL- BV	\$ 73.27	\$ 76.21
De LUCA, MARY	GUIDANCE TECH	\$ 23.92	\$ 24.16
DELGADO, DELORES	DIR. OF SECONDARY	\$ 75.02	LEFT DISTRICT
DEVICH, ROBERT	PRINCIPAL - KELLY	\$ 69.79	\$ 72.58
DOLKAS, THERESE	REGISTRAR	\$ 31.24	\$ 31.55
DRAWBAUGH, SALLY	ADMINISTRATIVE SECRETARY	\$ 27.03	\$ 27.31
DURHAM, ELLEN	SUPT SECRETARY	\$ 49.46	\$ 51.44
EVANS, AMY	OFFICE CLERK	\$ 20.98	LEFT DISTRICT
FLANAGAN, MELODY	ATTENDANCE CLERK	\$ 19.18	\$ 20.34
FORNELLI, LINDA	NURSE/HEALTH SERVICES	\$ 26.71	\$ 34.11
FRAZIER, SUSAN	ACCOUNTANTING TECHNICIAN	\$ 26.33	LEFT DISTRICT
FREEMAN, GAYLEN	DEPUTY SUPERINTENDENT	\$ 87.93	LEFT DISTRICT
GEARING, LINDA	ACCOUNTING TECHNICIAN	\$ 23.92	\$ 24.16

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## ∍n and Associates

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# MANDATE REIMBURSEMENT SERVICES

Namo	77.00		Fiscal	Fiscal Years:	
	litle	02-08		20-90	
GLENN, SUSAN	ADMIN SECRETARY	\$	31.24	€	31.55
GOELTZ, КАТНҮ	PSYCHOLOGIST	₩.	45.35	\$	50.41
GONZALES, ALICE (JEAN)	ADMIN SECRETARY	↔	23.35	8	23.58
GUNZELMAN, CATHY	OFFICE ASSISTANT	€	18.69	€	18.89
HANCOCK, CATINA	ASSISTANT PRINCIPAL	<del>69</del>	59.53	\$	61.91
HANSEN, JUDITH	ADMINISTRATIVE SECRETARY	€	23.35	\$	24.77
HANSEN, ROSE MARIE	ATTENDENCE CLERK	₩	20.13	\$	20.34
HANSEN, SUSAN	INSTRUCTIONAL AIDE	₩	18.69	<b>€</b>	18.89
HARPER, DONNA	DIRECTOR, PURCHASING & STRS	€ <del>9</del>	54.96	9 \$	96.09
HARTMAN, JANE	ASSISTANT PRINCIPAL (TEACHER ON SP. ASSIGN.)	€	55.48	9	64.99
HETRICK, LINDY	ADMINISTRATIVE SECRETARY	\$	24.51	\$ 2	26.00
HOLLEY, NORMAN /KEITH	PRINCIPAL	8	73.27	2 \$	76.21
HOWARD, TINA IRENE	ASSISTANT PRINCIPAL	\$	59.53	9	61.91
JACKSON, DEBRA	ADMINISTRATIVE SECRETARY	\$	22.24	LEFT DISTRICT	
JENNINGS, DIANE	ADMIN ASSISTANT	€	30.50	36	30.80
JIMENO, ALICE	ADMINISTRATIVE SECRETARY	\$	25.75	\$	26.00
KALK, DAVE	ASSISTANT PRINCIPAL	€	44.22	\$	58.50
KRYZAK, JENNIFER	HEALTH TECHNICIAN	€	19.67	\$ 2(	20.86
KUHN, MARY	ADMINISTARTIVE SECRETARY-CONFIDENTIAL	<del>69</del>	30.46	3,	31.98

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# Six and Associates MANDATE REIMBURSEMENT SERVICES

		Œ.	iscal	Fiscal Years:	
Name	Title	90-90		20-90	
LANE, KIM	HEALTH TECHNICIAN	\$	23.91	€	24.15
LARSON, JENNIFER	HEALTH TECHNICIAN	\$ 25	25.11	· · · · · · · · · · · · · · · · · · ·	25.36
LARSON, LESLIE	HEALTH TECHNICIAN	\$ 21	21.68	₩	21.90
LEWIS, RICK	DIRECTOR, INFORMATION SYSTEMS	\$	62.28	\$	68.58
LORD, WILLIS (BILL)	ASSISTANT PRINCIPAL	79 \$	64.57	<del>\$</del>	68.95
LUTZ, CINDY	HEALTH TECHNICIAN	\$ 21	21.68	€9	21.90
MADDOX, SHEILA	PRINCIPAL	39 \$	69.79	€9	72.58
MARTINEZ, PAUL	MAINTENANCE III	\$ 34	34.50	<del>69</del>	34.85
McCORMAC, KATHRYN	LEAD ACCOUNTANT	\$ 33	33.68	€	37.14
McCORMICK, LAURA JEAN	OFFICE ASSISTANT	\$ 16	16.96	€	17.99
MERCHANT, SHARAN	IS SPECIALIST	\$ 33	33.50	\$	34.85
MILLIKIN, CAROLYN	PRINCIPAL-VALLEY	\$ 73	73.27	€	76.21
MONDERINE, ROSEMARY	PURCHASING AGENT	\$ 32	32.06	€	32.38
NAVARRO, NANCY	DIRECTOR, DIST FINANCIAL SERVICES	69 \$	69.61	\$	76.21
NORTON, TORRIE	ASSISTANT SUPERINTENDENT- PERSONNEL	\$ 81	81.30	\$	94.20
O'CONNELL, SUZANNE	ASSISTANT SUPERINTENDENT- INSTRUCTIONAL	81	81.30	<b>↔</b>	94.20
OGAN, LAURA	ATTENDENCE CLERK	\$ 20	20.13	<b>₩</b>	20.34
OHLIN, VANGIE	ADMINISTRATIVE ASSISTANT	\$ 18	18.66	₩	20.34
PFRANG, SHARON	OFFICE ASSISTANT	\$ 18	18.15	€	18.89
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SixTen and Associates dl 9/20/2007

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# Six__n and Associates

# MANDATE REIMBURSEMENT SERVICES

		Fisc	Fiscal Years:
Name	Title	02-06	20-90
SHINTO, DEBRA	ACCT TECHNICIAN	\$ 23.93	\$
SIMS, CYNTHIA	ADMIN SECRETARY	\$ 23.35	5 \$ 24.77
SMITH, CURTIS	PRINTING TECHNICIAN	\$ 29.77	\$ 30.07
SMITH, EMELIA (EMILY)	ADMIN ASSISTANT	\$ 23.35	\$ 23.58
STANCHI, MARGARET	ASSISTANT PRINCIPAL	\$ 69.61	\$ 81.65
STROPLE, MARIA	OFFICE ASSISTANT	\$ 16.15	\$ 17.13
SWEARINGEN, BARBARA	ADMIN ASSISTANT	\$ 23.35	\$ 23.58
SWEARINGEN, DOLORES	FOOD SERVICE WORKER	\$ 16.43	LEFT DISTRICT
TALBOT, ALICE	ACCT TECHNICIAN	\$ 26.33	\$ 26.59
TEMPLETON, WILLIAM LANCE	SKILL MAINTENANCE WORKER	\$ 30.38	\$ 33.19
THOMPSON, TRUDY	ADMIN ASSISTANT	\$ 32.84	\$ 33.17
TOKORCHECK, JAN	COMPUTER TECHNICIAN	\$ 32.86	\$ 33.19
TROGDEN, ERIK	PRINCIPAL MIDDLE SCHOOL	\$ 65.63	\$ 70.24
TRUXAW, PEGGY	OFFICE ASSISTANT	\$ 19.64	\$ 19.83
TUBBS, RICHARD	PRINCIPAL-HOPE	\$ 54.61	\$ 65.00
VAN VOOREN, CAROL	PRINCIPAL-PINE & JEFFERSON	\$ 69.79	\$ 76.21
VAN ZANT, STEVEN	PRINCIPAL	\$ 73.27	LEFT DISTRICT
VILLAMAR, OFELIA	OFFICE ASSISTANT	\$ 16.96	\$ 17.99
VODICKA, DEVIN	PRINCIPAL	\$ 73.27	\$ 78.02

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# Six n and Associates

# MANDATE REIMBURSEMENT SERVICES

		Fisca	Fiscal Years.
Name	Title	05-06	
WADE, PATRICIA	INSTRUCTIONAL AIDE	\$ 18.69	\$ 18.89
WALLACE, AUTUMN	ADMINISTRATIVE ASSISTANT	\$ 23.80	LEFT DISTRICT
WALLS, SHARON	PERSONNEL SPECIALIST	\$ 31.28	\$ 33.17
WARNER, MARLENE	LIBRARY TECHNICIAN	\$ 25.11	\$ 25.35
WATSON, MARGARET	PRINCIPAL - MIDDLE SCHOOL	\$ 66.14	\$ 76.21
WILSON, WILLIAM	PSYCHOLOGIST		\$ 71.80
WRIGHT, CHARLES SCOTT	PRINCIPAL - CARLSBAD	\$ 82.43	LEFT DISTRICT
YODER, KAREN	ADMIN ASSISTANT	\$ 24.51	\$ 24.77
ZAK, SHARON	TEST SITE COORDINATOR- (TEACHER)		\$ 32.78

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### California Department of Education - School Fiscal Services Division

stricted Indirect Cost Rates for K-12 Local Educational Agencies - Five Year Listing

Address questions to sacsinfo@cde.ca.gov, or call (916) 322-1770.

					A P P F	OVED	RATES -	
				For us	se with state an	d federal progr	ams, as allowa	ble, in:
	T	$\overline{}$		2002-03	2003-04	2004-05	2005-06	2006-07
Co.	10371	Type*	Name (sorted by CDS code)	(based on 2000-01 expenditure data)	(based on 2001-02 expenditure data)	(based on 2002-03 expenditure data)	(based on 2003-04 expenditure data)	(based on 2004-05 expenditure data)
37	67967	<u>D</u>	San Diego County Superintendent	8.11%	8.05%	9.84%	8.54%	8.22%
37	67975	D	Alpine Union Elementary	2.86%	3.46%	3,50%	3,16%	2.99%
37	67983	<u> </u>	Bonsall Union Elementary	4.86%	4.15%	4.54%	4.41%	4.71%
37	67991	D	Borrego Springs Unified	8.30%	5.40%	6.07%	8.52%	7.95%
37	68007	D	Cajon Valley Union Elementary Cardiff Elementary	5.42%	4.56%	5.55%	7.46%	7.28%
37	68023	D .	Chula Vista Elementary	4.74%	3.68%	3.96%	4.44%	3.82%
37	68031	<del>_</del>	Coronado Unified	5.54%	4.07%	5.36%	4.76%	3.83%
37	68049	D	Dehesa Elementary	6.01%	8.47%	8.08%	6.29%	6.41%
37	68056		Del Mar II-i El	3.36%	7.82%	7.45%	5.62%	5.92%
37	68080	- <del>D</del>	Del Mar Union Elementary	4.67%	2.44%	5.42%	6,00%	2.98%
37	68098		Encinitas Union Elementary	5.00%	4.57%	6.33%	5.04%	5.22%
37	68106		Escondido Union Elementary	4.68%	4.69%	5.75%	4.97%	4.21%
37	68114	<del>- 5</del> -	Escondido Union High	6.22%	9.05%	10.22%	8.07%	7.20%
37	68122	<del>- 6</del> -	Fallbrook Union Elementary	7.61%	5.46%	6.11%	6.69%	5.76%
37	68130	<del></del>	Fallbrook Union High	7.15%	10.46%	11,10%	10.32%	7.90%
37	68155		Grossmont Union High	1.56%	3.41%	4.68%	5.70%	5.03%
37	68163	D	Jamul-Dulzura Union Elementary	7.47%	4.34%	1,28%	4.56%	5.43%
37	68171		Julian Union Elementary	5.73%	6.57%	9.26%	6.16%	
37	68189		Julian Union High	11.04%	8.04%	4.37%	5.35%	1.61%
37	68197	岩	Lakeside Union Elementary	6.14%	9.03%	8.91%	7.63%	11.14% 6.49%
37	68205	<del>-    </del>	La Mesa-Spring Valley Elementary	3.35%	3.01%	3.14%	3.64%	4.17%
27	68213	D	emon Grove Elementary	7.38%	9.96%	11,53%	10.06%	9.47%
1	68221		Mountain Empire Unified	6.39%	5.11%	6.20%	5.68%	
- /1	68296		National Elementary	5.73%	6.32%	6.18%	5.85%	6.57%
37	68304		Poway Unified	4.53%	5.00%	5.17%	5.19%	5.94%
37	68312	D	Ramona City Unified	5.99%	4.66%	6.62%	7.67%	5.55%
37	68338	D	Rancho Santa Fe Elementary	5.33%	6.59%	8.29%	11.03%	6.74% 9.99%
37	68346	D 8	San Diego City Unified	2.30%	3.19%	3.58%	5.83%	
37	68353	D 5	San Dieguito Union High	5.35%	6.29%	6.54%	7.45%	3.67% 8.12%
37	68361	D 5	San Pasqual Union Elementary	9.39%	4.72%	5.01%	5.82%	0.32%
	68379		Santee Elementary	7.87%	4.72%	5,14%	7.06%	6.98%
	68387	D S	San Ysidro Elementary	4.35%	5.42%	4.89%	5,58%	5.94%
	68395	D 5	Solana Beach Elementary	7.90%	6.01%	8.15%	11.18%	9.01%
	68403	D S	South Bay Union Elementary	5.90%	4.54%	6.11%	6.15%	6.90%
	68411	D S	pencer Valley Elementary	14.49%	16.09%	15.10%	15.98%	12.57%
	68437		Sweetwater Union High	4.15%	6.06%	4.99%	4.63%	4.75%
	68452		allecitos Elementary	8.50%	7.47%	8.49%	3.65%	5.56%
_	73551		/ista Unified	3.15%	4.09%	4.57%	4.61%	
_	73569		arlsbad Unified	5.70%	5.03%	5.73%	5.83%	3.61%
	73791		oceanside Unified	5.06%	4.15%	4.53%	4.44%	6.48%
	75416		an Marcos Unified	3.21%	4.45%	4.07%	3.16%	4.32%
	75614		/amer Unified	1.33%	5.26%	6.17%	7.42%	3.74%
/r ]	70014	D V	alley Center-Pauma Unified	2.01%	1.07%	5.89%	7.98%	10.93% 6.32%

^{*} C = County Office of Education

D = District

J = Joint Powers Agency

Fiscal Year

2005 - 2006 337

### Six en and Associates **Mandate Reimbursement Services**

KEITH B. PETERSEN, MPA, JD, President E-Mail: Kbpsixten@aol.com

Sacramento

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Fax: (916) 564-6103

Claim File Copy

San Diego 5252 Balboa Avenue, Suite 900 San Diego, CA 92117

Telephone: (858) 514-8605 Fax: (858) 514-8645

December 28, 2006

CERTIFIED MAIL #7003 3110 0000 2900 4884

Ms. Virginia Brummels, Section Manager Local Reimbursement Section Division of Accounting and Reporting Office of the State Controller P.O. Box 942850 Sacramento, CA 94250

RE:

Annual Reimbursement Claims

Carlsbad Unified School District S37030

Dear Ms. Brummels:

Enclosed please find the original claims and extra copies of the FAM-27 for Carlsbad Unified School District's reimbursement claim listed below:

1184/75	Habitual Truants	2005-2006
1208/76	Pupil Health Screenings	2005-2006
498/83	The Stull Act	2005-2006
98/94	Caregiver Affidavits	2005-2006

If you have any questions regarding these claims, please contact me at (858) 514-8605.

Sincerely,

Larry Hendee, Vice-President

SixTen and Associates
Form FAM-27 (New 12/05)

(38) Name of Contact Person for Claim

Walter Freeman

Type or Print Name

Telephone Number:

E-mail Address:

Assistant Superintendent, Business Services

(858) 514-8605

kbpsixten@aol.com

Title

Program 260		THE ST	ED COSTS ULL ACT SUMMARY				FORM SA-1
(01) பெள்ளைt Carlsbad Unified School District			(02) Type of Claim  Reimburseme	ent X		<b></b>	Fiscal Year 2005-2006
Direct Costs		`	<u> </u>	Accounts			
(03)	(a)	(b)	(c)	(d)	(e)	<del></del>	<u></u>
Reimbursable Components	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training		(f) Total
A. Certificated Instructional Employees (CIE)	Claim Statistics:	<u> </u>	evaluated per (03)	(A)(1) and (03)(A)(		+-	30
1. Evaluate and assess performance					ment period begir	 is fv 1	
a. Review employee's techniques and strategies	\$ 23,546.25		\$ -	\$	\$ 2,193.3	1	25,739.59
b. Evaluation to include assessment of techniques and strategies	\$ 48,662.25	\$ -	\$ -	\$	- \$	-  \$	48,662,25
Evaluate and assess CIE who teach certain subjects	Ed. Code §4466	2, subd. (b), as ar	mended by Ch. 4/	99; Reimburseme	nt period begins	_1	-
a. Review STAR results	\$ 12,558.00		\$ -	\$		-   \$	12,558.00
Assessment based on STAR results	\$ 12,558.00	\$ -	\$ -	\$ -	\$	. \$	12,558.00
8. CIE and NIE Employees	Claim Statistics:	Number of CIE's	and NIE's evaluate	d per (03)(B)(1)	<u> </u>	+	
Evaluate and assess     CIE and NIE employees					nent period begin	s fv 1	997-98
Evaluating and assessing CIE according to certain criteria	\$ -	\$ -	\$ -	\$ -	\$	\$	
b. Reducing evaluation to writing	\$ -	\$ -	\$ -	\$ -	\$ -	s	
c. Transmitting evaluation to CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$	
d. Attaching response to personnel file	\$ -	\$ -	\$ -	\$ -	\$ -	\$	
e. Discussing evaluation with CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$	<del></del>
04) Total Direct Costs	\$ 97,324.50	\$ -	\$ -	\$ -	\$ 2,193.34	\$	99,517.84
ndirect Costs			<del></del>		<u> </u>	<u> </u>	<del></del>
05) Indirect Cost Rate				[From J-380 or J-580]			5.83%
06) Total Indirect Costs		-		[Line (05) x Ine (04)(a)]	<del></del>	\$	5,674.02
7) Total Direct and Indirect Costs				[Line (04)(f) + fne (06)]		\$	105,191.86
ost Reduction						<u></u>	
b, Offsetting Savings			<del></del>			\$	
9) Less: Other Reimbursements			<del></del>	<del></del>		\$	
0) Total Claimed Amount			[Line (	07) - {Line (08) + Line	(09)}]	\$	105,191.86
aw 12/05	<del></del>		340		\m	<b>*</b>	100,181.00

State Controller's Office	ce	· · · · · · · · · · · · · · · · · · ·					Scho	ol Mandated	Cost Manua
Program 260		COM		ED COSTS ULL ACT	NETAH .			· · · · · · · · · · · · · · · · · · ·	FORM SA-2
1/0	<del></del>	CON	FONENTIACT		<del></del>	· · · · · · · · · · · · · · · · · · ·			
Cc Jad Unified School	District			(02) Fiscal \	/ear				2005-2006
(03) Reimbursable Com	ponents:	Check only one box per form to	identify the cor	nponent being	claimed.	· · · · · · · · · · · · · · · · · · ·			
A. CIE	Х	Review employee's techniques and strategies		Evaluation to income of techniques ar	clude assessmen nd strategies	t			
		Review STR Results		Assessment ba	sed on STR resul	ts	•	•	
B. CIE & NIE		Evaluating and assessing CIE according to certain criteria	og	Reducing evalu	ation to writing		Transmitting eva	iuation to CIE	· · · · · · · · · · · · · · · · · · ·
		Attaching response to personnel file		Discussing eval	uation with CIE				
(04) Description of Expe	nses				_		bject Account	<u> </u>	
	(	a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
Classifi	cations, Fu	Names, Job Inctions Performed, on of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
				-	<del> </del>	<del>-</del> -	<del></del>		<del> </del>
Preparing to evaluate and asse Administrators	ess the peri	formance of a CIE Various	\$62.79	150.0	\$ 9,418.50	·			
Discussing the CIE's goals and Administrators	l objectives	Various	\$62.79	125.0	\$ 7,848.75				
Pre-observation conference an	ıd discussio		402.110	120.0	Ψ 7,040.70				
Administrators		Various	\$62.79	100.0	\$ 6,279.00				
Andance at training required Ahle, Stephen Chrisman, Karl R DeAnda, Jose Devich, Robert Maddox, Shella Millikin, Carolyn Tubbs, Richard Watson, Margare	Robert	evaluations Principal Principal Principal Principal Principal Principal Principal Principal Assistant Principal Principal	\$73.27 \$69.79 \$73.27 \$69.79 \$69.79 \$73.27 \$54.61 \$66.14	4.0 3.0 4.0 3.0		4			\$ 293.08 \$ 279.16 \$ 219.81 \$ 279.16 \$ 209.37 \$ 219.81 \$ 163.83 \$ 529.12
05) Total [X]		Subtotal	Page		0.0000				
05) Total 🗓		Subtotal	Page 1	l of 1	\$ 23,546.25	\$ -	\$ - 8		\$ 2.193.34

Clate Controller's Office	<del></del>				Sch	ool Mandate	d Cost Manua
Program 260 COI		ED COSTS  JLL ACT  VITY COST I	DETAIL				FORM SA-2
(n ) aimant	- CITELLIA OIL	(02) Fiscal	·	<del></del>			<u> </u>
C. add Unified School District							2005-2006
(03) Reimbursable Components: Check only one box per form to	to identify the cor	nponent being	claimed.	<del></del>			· · · · · · · · · · · · · · · · · · ·
A. CIE Review employee's techniques and strategies	X	Evaluation to in of techniques a	clude assessment nd strategies				
Review STR Results		Assessment ba	sed on STR results				
B. CIE & NIE Evaluating and assessing CIE accord to certain criteria	ling	Reducing evalu	ation to writing		Transmitting ev	aluation to CIE	
Attaching response to personnel file		Discussing eval	uation with CIE		·		٠.
(04) Description of Expenses				C	bject Accoun	ıts	
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
Employee Names, Job Classifications, Functions Performed, and Description of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assets	Travel and Training
	<del></del>	<u> </u>	<del>                                     </del>		-	1	
Classroom observation to evaluate and assess performance Administrators Various	\$62.79	325.0	\$ 20,406.75				
Post-observation conference and discussion with CIE Administrators Various	\$62.79	150.0	\$ 9,418.50				
Discussing evaluation and write-up with CIE ' Administrators Various	\$62.79	125.0	\$ 7,848.75				
lucing evaluation to writing, forward to personnel file						İ	
Administrators Various	\$62.79	175.0	\$ 10,988.25				
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05) Total X Subtotal	Page 1	of 1	\$ 48,662.25	\$ -	\$ -	\$ -	\$ -

State Controller's Office						Sch	ool Mandated	l Cost Manua
Program	•		D COSTS					FORM
260	СОМ	THE STU PONENT/ACTI		DETAIL				SA-2
(/	,		(02) Fiscal	Year				2005.000
(03) Reimbursable Components	s: Check only one box per form to	identify the con	nnonent heine	r claimed				2005-2006
A. CIE	Review employee's techniques and	, <b>.</b>	Evaluation to in	clude assessment				
X	strategies  Review STR Results		of techniques a	nd strategies sed on STR result				
B. CIE & NIE	Evaluating and assessing CIE according	, , , , , , ,	Reducing evalu		·	Transmitting	valuation to CIE	
	to certain criteria  Attaching response to personnel file		Discussing eval			rransmitting ev	ratuation to CIE	
(04) Description of Expenses	/ Audoming response to personate ine		Discussing eval	uauun with Cie		bject Accou		
<del></del>	(a)	(b)	(c)	(d)	. (e)	(f)		(h)
Classifications, F	e Names, Job Functions Performed, tion of Expenses	Hourly Rate or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	(g) Fixed Assets	(h) Travel and Training
Preparing to evaluate and assess the pe Administrators	erformance of a CIE Various	\$62.79	100.0	\$ 6,279.00	-			
Discussing the CIE's goals and objective Administrators	es Various	\$62.79	50.0	\$ 3,139.50				
Pre-observation conference and discuss		<b>402.73</b>	50.0	Ψ 3,139.30				
Administrators	Various	\$62.79	50.0	\$ 3,139.50				
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05) Total X	Subtotal	Page 1	of 1	\$ 12,558.00	\$ -	\$ -	\$ - !	

State Controller's Offic	:e	<del></del>	<del></del>	MANDATI	-n 000ma			Sch	ool Mandated	Cost Manua
Program 260			COMP		ED COSTS JLL ACT VITY COST	DETAIL				FORM SA-2
Claimant					(02) Fiscal			·		
bad Unified School					(, , , , , , , , , , , , , , , , , , ,	1001				2005-2006
(03) Reimbursable Com	ponents:	, , , , , , , , , , , , , , , , , , , ,		lentify the con	nponent bein	g claimed.			<del></del>	
A. CIE		Review employee's techniques strategies	and		Evaluation to in of techniques a	nclude assessment and strategies	t •			
		Review STR Results		X	Assessment ba	sed on STR result	s			
B. CIE & NIE		Evaluating and assessing CIE at to certain criteria	according		Reducing evalu	ation to writing		Transmitting ev	aluation to CIE	
		Attaching response to personne	el file		Discussing eva	luation with CIE				
(04) Description of Exper								bject Accoun	its	
_		а)		(b)	(c)	(d)	(e)	(f)	(g)	(h)
Classific	ations, Fu	Names, Job Inctions Performed, on of Expenses		Hourly Rate .or Unit Cost	Hours Worked or Quantity	Salaries and Benefits	Materials and Supplies	Contract Services	Fixed Assels	Travel and Training
		-				-				
Classroom observation to evalue Administrators		sess performance Various		<b>\$</b> 62.79	100.0	\$ 6,279.00				
Posi-observation conference an Administrators	d discussio	on with CIE Various		\$62.79	50.0	\$ 3,139.50				
Discussing evaluation and write- Administrators	up with Cl	E Various		<b>\$</b> 62.79	50.0	\$ 3,139.50				
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5) Total X	S	ubtotal		Page 1 d	of 1   §	12,558.00	· -  :	8 - 5	e	

Carlsbad Unified ol District 498/83 THE STULL ACT 2005-2006 Sort by Name

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ייין	Review emplayed's techniques and effections	cores anproyees reclimiques and suggested as	Review employee's techniques and stratogics	verer anipoyees teaminques and suggested	Review employee's fechniques and strategies	
	Activity	\$6.279.00 Preparing to evaluate and assess the performance of a CIE	,139.50 Discussing the CIE's goals and objectives	139.50 Pre-observation conference and discussion with CIE	279 00 Classroom observation to evaluate and assess performance	\$3.139.50 Post-observation conference and discussion with CIE	\$3.139.50 Discussing evaluation and write-up with CIE	El O do concu		279.00 Pre-observation conference and discussion with CIE	poucu	418.50 Post-observation conference and discussion with CIE		. elli leuuusi		Attendance at training required to nerform evaluations		Attendance at training required to perform evaluations		Aftendance at training required to perform evaluations		Attendance at training required to nerform evaluations		\$209.37 Attendance at training required to perform evaluations		Attendance at training required to perform evaluations		Attendance at training required to perform evaluations		Attendance at training required to perform evaluations	
	Salary	\$6,279.0	\$3,139.5	\$3,139.5	\$6.279.0	\$3.139.5	\$3,139,5	\$9 418 5	\$7.848.7	\$6,279.0	\$20,406.7	\$9.418.50	\$7,848.7	\$10,988.2	\$97,324,50	\$293.08	\$293.08	\$279.16	\$279.16	\$219.81	\$219.81	\$279.16	\$279.16	\$209.37	\$209.37	\$219.81	\$219.81	\$163.83	\$163.83	\$529.12	\$529.12 \$99,517.84
-	 FR	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79	\$62.79		\$73.27		\$69.79		\$73.27		\$69.79		\$69.79		\$73.27		\$54.61		\$66.14	
		Various	Various	Various	Various	Various	Various	Various	Various	Various	Various	Various	Various	Various		Principal		Principal	t Total	Principal		Principal		Principal		Principal		Assistant Principa		Principal	=
		Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators	Administrators		Administrators Total	Ahle, Stephen	Ahle, Stephen Total	Chrisman, Karl Robert Principal	Chrisman, Karl Robert Total	DeAnda, Jose	DeAnda, Jose Total		Total		Maddox, Sheila Total	Millikin, Carolyn	Millikin, Carolyn Total	Tubbs, Richard	Tubbs, Richard Total	Watson, Margaret	watson, Margaret Total Grand Total
	Hours	100.00	20.00	20.00	100.00	20.00	50.00	150.00	125.00	100.00	325.00	150.00	125.00	175.00	1,550.00	4.00	4.00	4.00	4.00	3.00	3.00	4.00	4.00	3.00	3.00	3.00	3.00	3.00	3.00	8.00	8.00 1,582.00
	Date	02-06	02-06	02-06	02-06	02-06	02-06	. 90-50	02-06	02-06	02-06	90-90	02-06	02-00		10/25/2005	34	2002/22/02	)	10/25/2005		10/25/2005		10/25/2005		10/25/2005		10/25/2005		10/25/2005	

District/C	OE:	Fiscal Year:_	08	5-06
51	hep	(10 OCONSALIE )		1
Employe	Name	Exact Position Title	7 00	<del></del>
	RE	33(-6299	idmo/d	Omo/bdv
Departme	ent/Locatio	on Telephone # Work y	ear ler	Omo/hrly igth(circle)
Reimbursal Code 31	Trainin	Codes: g evaluators: Time spent by district staff preparing and corstaff on how to perform the reimbursable certificated emplo	nducting Dyee eva	training of luations.
Classroom	evaluatis, repe	tor trainees: Time spent by district staff to attend training, cother source, on how to perform the reimbursable certifications. Each trainee can be reimbursed only once for the salest training is not reimbursed.  It is not reimbursed unless separately compensated to atterpretately per line.	ed empl me train	oyee ling course, that
	IT DIE COUC	ondy par line.		
Date:	Activity Code (circle one) :	Describe the activity:	Time in Hours	Substitutes & Materials cost
10,2505	3(1 32)	FISK way	4	M
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Employee Si	_	Date 10-		
		please contact, at		
PLEASE SU	BMIT THIS IN	FORMATION BY; TO		

District/COE	4512	Fiscal Year:	05-06
- FRISIA	<u> </u>	S\co	E HODE
Type of Training Activity	10/20/20	Training Location	
Date of Activity	10/25/05	Start and End Times	100
	<del>,</del>	Start and End Times	
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1322 Chrisman	principé 1	Hope Elem	Trainer (Trainee)
2		7	Trainer Trainee
.3			Trainer Trainee
4			Trainer Trainee
5			Trainer Trainee
6			Trainer Trainee
7			Trainer Trainee
8		· ·	Trainer Trainee
9			Trainer Trainee
10			Trainer Trainee
Provide a brief description of	of the training curriculum or a	attach copy of agenda and ma	aterials:
FRISK		· · · · · · · · · · · · · · · · · · ·	
The District training coordin	ator for this event, or anothe	r district employee, needs to	sign below
EMPLOYEE CERTIFICATION: 1	The State of California requires	that aghael district	
nave reported actual data or have reported actual data or have priury under the laws of the Stanformation." This information is	re provided a good faith estima te of California to be true and o	ment. Your signature on this for te which you "certify (or declare correct based on your personal l	n certifies that you ) under penalty of knowledge or
Employee Signature	e contect	Date	
f you have any questions, pleas PLEASE SUBMIT THIS INFORM	MATION BY	, at : TO	<u> </u>
		_,,,~	

To Se Employer B. T Departme		Exact Position Title  331-5499  Telephone # Work	11mo/1	Omo/hrly	
Reimbursa Code 31 Code 32	Trainin district Evalua or any	r trainees. Time spent by district staff to attend training, of their source, on how to perform the reimbursable certificated employers.	loyee eve conducte ited empl	aluations. Id by the distriction	
		ins. Each trainee can be reimbursed only once for the said training is not reimbursed.  Is not reimbursed unless separately compensated to attempt par line.	:		<b>==</b>
Date:	Autivity Code (circle one) :	Describe the activity:	Time in Hours	Substitutes & Materials cost	
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Revised December 2005

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### Employee Sign-in Record Sheet for Mandated Costs 498/83 The Stull Act (K-12) Training of Evaluators

	Haming OF EV	aluators	
District/COE	D/SDOE	Fiscal Year: 20	205
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Type of Training Activity	<del></del>	Training Location	1
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Date of Activity		Start and End Times	
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DISTRICT EMPLOYEE	BIOTRIAL THE	T	
NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 CUD (ShA)	Pencipul/Killy	Kelly School	Trainer (Trainee
2 ROBERT DE	FUICH C	U	Trainer Trainee
,3			Trainer Trainee
4			Trainer Trainee
5			Trainer Trainee
6			Trainer Trainee
7			Trainer Trainee
8			Trainer Trainee
9			Trainer Trainee
10			Trainer Trainee
Provide a brief description of	of the training curriculum or a	ttach copy of agenda and ma	aterials:
The District training coordinate	ator for this event, or another	district employee, needs to	sign below.
EMPLOYEE CERTIFICATION: T	he State of California requires	that asks at district	
have reported actual data or have perjury under the laws of the Sta	re provided a good faith entimet	nent. Your signature on this form te which you "certify (or declare) orrect based on your personal,k	n certifies that you
Employee Signature	H W	Date	5/00
f you have any questions, pleas	e contact	, at	
PLEASE SUBMIT THIS INFORM	IATION BY	;то	

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### Employee Sign-in Record Sheet for Mandated Costs 498/83 The Stull Act (K-12) Training of Evaluators

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	Start and End Times	- Note
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District/COE		Fiscal Year:	05/04	
FRISK Tra	ining	National Ci	ty VAII	eymidale
Type of Training Activity	105-800	Training Location		4. 9.
10-25-06	- assure signer	030 1/32	THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE STATE OF THE S	. i ^f
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DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)	
1 Carolyn Millitin	Principal	Valley MS	Trainer Trainee	
2		l .	Trainer Trainee	
3			Trainer Trainee	
4			Trainer Trainee	
5			Trainer Trainee	
6			Trainer Trainee	
7			Trainer Trainee	
8			Trainer Trainee	
9	·	· · · · · · · · · · · · · · · · · · ·	Trainer Trainee	
10			Trainer Trainee	
Provide a brief description of	of the training curriculum or at	ttach copy of agenda and ma	aterials:	
FKISK Tra	ining - Haw +	when to when	te up an	Í
employee +.	how to include	e un evalua:	tjom	1
The District training coordin	ator for this event, or another	district employee, needs to	sign below.	
EMPLOYEE CERTIFICATION: 1 for state mandates in order for the have reported actual data or have perjury under the laws of the Statinformation." This information is Employee Signature	re provided a good faith estimate the of California to be true, and counting purpour used for cost accounting purpour to the counting purpour to the counting purpour to the counting purpour to the counting purpour to the counting purpour to the counting purpour to the counting purpour to the counting purpour to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the counting to the c	e which you "certify (or declare) orrect based on your personal   ses only	n certifies that you under penalty of (nowledge or	
If you have any questions, pleas				
PLEASE SUBMIT THIS INFORM	MATION BY	; TO, at		

<u> </u>	raining of Evaluators							
District/COE Carlsba	d USD	Fiscal Year: <u>05-</u>	Db					
FRISK		National City	Alley middle					
Type of I raining Activity	mad to 8 8 prigned to a min	Training Location	2					
Type of Training Activity  10-25 (0 6) - 0.56 m	was were many 2 8th	830-1130	<u> </u>					
Date of Atomy	A SOU OF SK IST	Start and End Times						
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)					
1 RICHARD TUBBS	ASSISTANT PRINCIPAL	VALLEY MIDDLE / CV&D	Trainer Trainee					
2			Trainer Trainee					
.3			Trainer Trainee					
4			Trainer Trainee					
5	-		Trainer Trainee					
6			Trainer Trainee					
7			Trainer Trainee					
8			Trainer Trainee					
9			Trainer Trainee					
10			Trainer Trainee					
Provide a brief description of	of the training curriculum or a	ttach copy of agenda and ma	terials:					
	how to plan, prepare, an							
	, , , , , , , , , , , , , , , , , , ,	- project visu	West (fore)					
The District training coordin	ator for this event, or another	district employee, needs to	sign below.					
EMPLOYEE CERTIFICATION: 7 for state mandates in order for the have reported actual data or have beginny under the laws of the Stenformation." This information is Employee Signature	The State of California requires to the district to receive reimbursenge provided a good faith estimate ate of California to be true and coused for cost accounting purposed.	that school district personnel manent. Your signature on this form the which you "certify (or declare) correct based on your personal k ses only.  Date 2/22/06	aintain a record of data n certifies that you under penalty of nowledge or EASE USE BLUE INK					
f you have any questions, pleas PLEASE SUBMIT THIS INFORM	AATION RY	, at	<del></del>					
- SE SOSIMI PINO NAPORA	MATION DI	; 10						

i raining of Evaluators						
District/COE	526213	Fiscal Year: 🔘	5-0le	•		
FRISK		Training Location	Magnelia			
Type of Training Activity	<del></del>	Training Location	V			
10-52-02		0.4-00-8	5 8	•		
Date of Activity		Start and End Times		<b>-</b>		
			·	<b>=</b>		
DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)			
Mary Worker	Parine	Marialia	Trainer Trainee			
2		3	Trainer Trainee			
.3			Trainer Trainee			
4			Trainer Trainee			
5			Trainer Trainee			
6		·	Trainer Trainee			
7			Trainer Trainee			
8			Trainer Trainee			
9	•		Trainer Trainee			
10			Trainer Trainee			
Provide a brief description of	of the training curriculum or a	ittach copy of agenda and ma	aterials:			
		ani of lebon				
		•				
The District training coordin	ator for this event, or anothe	r district employee, needs to	sign below	nto to		
have reported actual data or have perjury under the laws of the Stainformation." This information is	ne district to receive reimburser we provided a good faith estima ate of California to be true and o a used for cost accounting purpo	that school district personnel manent. Your signature on this form the which you "certify (or declare) correct based on your personal in oses only.	n certifies that you	comentation		
Employee Signature		Date 2 - 16 - C				
If you have any questions, pleas	se contact	, at				
PLEASE SUBMIT THIS INFORM	MATION BY	_ ; TO				

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### HILL WILLIAM SHE

## rou are accountable

As an evaluator you are accountable for providing a practical and straightforward method of documenting unsatisfactory employee performance.

# Protect yourself and your employer!

- Documentation and file-building techniques
  - Primary documentation components
- Legally sufficient disciplinary memoranda
  - Personnel files
- Progressive discipline; and more!

## et the information you need

Fifect positive change through clear communication I dentify the common elements necessary for legally sufficient documentation; and

Simplify the drafting of documentation by establishing a common framework

Steven J. Andelson is a senior partner with the law firm of Atkinson, Andelson, Loya, Ruud & Romo. He received his Bachelors degree with honors from UCLA and his Juris Doctor from UC Davis. He has 30 years of experience with public education institutions. He is the author of the FRISK Documentation Model and co-author of the School Law Update.

Atkinson, Andelson, Loya, Ruud & Romo represents private and public sector employers throughout California, including school districts, community colleges, county offices of education, special districts

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New and experienced administrators, classified management.

### Content

In-depth review of the critical feedback elements evaluators should use in addressing performance problems and their application in promoting positive change, satisfying just cause requirements and providing a clear understanding of performance expectations. Related examples and hypotheticals will be discussed and analyzed.

### THE CONTROLL

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### Cost.

\$95.00 per person

### tocation:

San Diego County Office of Education 6401 Linda Vista Rd., Room 306 San Diego, CA 92111-7399 (858) 292-3511

### SESSION

PATE: Thursday December 1, 2005

SIGN IN: 8:30 AM

SESSION: 9:00 AM - 11:30 AM

## PLEASE DIRECT QUESTIONS TO:

Linda Gant Human Resource Services Division (858) 292-3511 • Fax (858) 292-5648 And Stroke Lander

### Schedule 1A Carlsbad Unified School District 498/83 Stull Act Fiscal Year: 2005-2006 Time Summary

Purpose: To calculate "Total Hours Worked" for "Various Principals and Vice Principals".

Source: Schedule 2A and 1.8-1.

Findings:

Various Administrators	Evaluation Criteria A	Evaluation Criteria B & C
# of reimbursable K-12 evaluations	300	300
Avg. time p/ evaluation preparation	20	30
Total Time (in minutes)	6000	9000
Per Hour	60	60
Hours Worked (Code 11)	100.0	150.0
# of reimbursable K-12 evaluations	300	300
Avg. time p/ goals & obj. conf. with instructor	10	25
Total Time (in minutes)	3000	7500
Per Hour	60	60
Hours Worked (Code 12)	50.0	125.0
H of reimburgable IC 40 started		
# of reimbursable K-12 evaluations	300	300
Avg. time p/ pre-observation conf. with instructor	10	20
Total Time (in minutes) Per Hour	3000	6000
7 - 7 - 7 - 7 - 7	60	60
Hours Worked (Code 13)	50.0	100.0
# of reimbursable K-12 evaluations	300	300
Avg. time p/ classroom observation of instructor	20	65
Total Time (in minutes)	6000	19500
Per Hour	60	60
Hours Worked (Code 14)	100.0	325.0
# of reimbursable K-12 evaluations	300	300
Avg. time p/ post-observation conf. with instructor	10	30
Total Time (in minutes)	3000	9000
Per Hour	60	60
Hours Worked (Code 15)	50.0	150.0
# of reimbursable K-12 evaluations	300	300
Avg. time p/ final conf. with instructor	10	25
Total Time (in minutes)	3000	7500
Per Hour `	60	60
Hours Worked (Code 16)	50.0	125.0
# of reimbursable K-12 evaluations		300
Avg. time p/ district reporting		35
Total Time (in minutes)		10500
Per Hour		60
Hours Worked (Code 17)		175.0

Conclusion: Findings will go forward to the SA-2.

### *Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor

Code 16- Final conference with instructor

Code 17- District reporting

### *Evaluation Criteria

(A) District standards and test results

(B) Instructional techniques/strategies

(C) Adherence to curricular objectives

(D) Suitable learning environment

### 498/83 The Stull Act (K-12) Routine Evaluations of Instructors DISTRICT STATISTICS REPORT

District/COE: CARLSBAD	UNIFIED
DISTRICT/COE: (ME())	UNITES

The following cost accounting statistics will assist the calculation of the district's reimbursement. Please report the required information in the spaces provided.

Certificated Instructors	Fiscal Year								
Statistical Data	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	05-0
1 A K-12 Probationary Teachers- Total Number	61	94	45	96	121	44	12	12	24
1 B K-12 Permanent Teachers- Total Number	306	273	283	****	349	<del></del>			44
1 C K-12 Temporary Teachers- Total Number	79	36	90	45	61	83	66	77	92
1 D K-12 Classroom Teachers- A + B+ C = Total Number	446	403	468	501	531	551	556	54da	56
2 A K-12 Probationary Teachers- Total Number Evaluated	53	89	86	90	117	40	11	10	19
2 B K-12 Permanent Teachers- Total Number Evaluated	144	130	15		147	202	233	220	215
2 C K-12 Temporary Teachers- Total Number Evaluated	75	33	86	60	58	79	61	natii I	<u>87</u>
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated	272	152	197	313	312		یے	***	92
8* K-12 Categorical/Grant Teachers- Total Number Evaluated	20	10	21	22	11	31	160	2	7
Reimbursable K-12 Evaluations Line 2 D subtract Line 3  i.C. 52012 School Improvement E.C.	152	232	276	291	30	290	2201	280	3D

A + B+ C = Total Number Evaluated	272	152	197	313	342	321	305	201	
3* K-12 Categorical/Grant Teachers- Total Number Evaluated	20	10	21	22	U	31	26	21	2
4 Reimbursable K-12 Evaluations Line 2 D subtract Line 3	252	132	276	291	520	290	210	280	3 N
E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52176 LEP/Billingual E.C. 52852 Coordinated Categorical E.C. 54425(b) Chapter 1 Federal compensatory education E.C. 54444.2 Migrant children E.C. 54724 Drop-out Prevention E.C. 62002.5 State Categorical Any state-federal-local grant-funded personnel maintain a record of data for state									
iata or have provided a good faith estimate which California to be true and correct based on your per	sense Social	ify (or de owledge	clare) un or informa	LITTLE TOTAL	ı cennes	imat you	ı have re	ported ac	tual
Employee Signature	1093				Date	3-	1-06		
ou have any questions, please contact	rie No	rton			, at	760-3	31-5025		
TOT GODINIT THIS INFORMATION BY			_ ; TO _		<del></del>			· ·	
		356	<b>S</b>				Ca	184-011	giral

### 498/83 The Stull Act (K-12)

### Re-evaluations of Unsatisfactory Certificated Permanent Staff DISTRICT STATISTICS REPORT

District/COE: ARLSPAD UN	HE		<del>-</del>						
The following cost accounting statistics report the required information in the spa	will assi: aces pro	st the ca ovided.	alculatio	on of the	e distric	t's reim	bursem	ent. Pl	ease
Statistical Data: Certificate Staff on					Fisca	l Year			
Unsatisfactory Status	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	05-06
5 K-12 Permanent Instructors									
A. Number on unsatisfactory status	2	1	3	2		3	4	2	1
B. Number of re-evaluations	1		2	2	0	2	3	2_	0
6 Permanent Non-Instructors:									
A. Number on unsatisfactory status	1		2	1	¥	1	4	2	1
B. Number of re-evaluations	1	1	1	0	·	0	1	A.	0
									-
7 Reimbursable Re-evaluations 5 B + 6 B = Total	2	2	3	Z	Albert .	2	4	4	0
Non-reimbursable re-evaluations (Do no	t include	e in the	statistic	s above	≘)				— - <u>— — — —  </u>
1. Any positions funded by these ca	tegorica	ais:							
E.C. 52012 School Improvement E.C. 52176 LEP/Bilingual E.C. 54425(b) Chapter 1 Federal compe E.C. 54444.2 Migrant Children E.C. 62002.5 State Categorical	E.C ensatory E.C	52852 educa 54724	2 Coord tion 4 Drop-	out Pre	Categor		e Act		
<ol> <li>Any position that is grant-funded</li> <li>Re-evaluations of temporary and</li> </ol>	long-te	rm subs	stitute te	eachers	•	•			
1 December 1	ursement 1 you "cer	i. Your sig tify (or de nowledge	inature or clare) un or inform	n this foπ ider pena	n certifies Ity of perj his inform	s that you urv under	i have re	ported ac	tual tate of
you have any questions, please contact To:	rrie No	orton			Date	760-3	31-500		<del></del>
DI FASE SURMIT THIS INFORMATION BY					, at _	700-3	331-502		<del></del>

iool District 498/83 Stull Act Schedi ''A Carlsbad Unified

Fiscal Years: 1997-98 thru 2005-06 Time Study

Purpose: To summarize time spent by "various principals and vice principals" on Stull Act.

Source: SA 1.7-1 Average Timesheets.

Findings:

								*Acti	*Activity Codes	Sabe							
								J		200							
	,		7	_			12				13					14	
Schoolsite	Staff	4	മ	ပ	Q	٧	8	ပ	۵	4	В	ပ	۵	4	В	ပ	۵
** Aviara Oaks Elem. Sheila Maddox	Sheila Maddox	2,100				2,280				-	210		210	-	450		450
Aviara Oaks Middle	Steve VanZant		30	30		30			30	30			30	50	100	100	100
Buena Vista											-						
Calavera Hills Elem.	Devin Vodicka	45	5	5	5	5	10	5	2	5	10	22	2	19	06	10	10
Calavera Hills Middle Erik Trogden	Erik Trogden	15	15	15	15	10	9	10	9		15		75	00	09	09	09
Carlsbad Alternative														1-			
	Dolores Delgado	40			-	20				15				49			
	Tom Bloomquist	10		10		5	2	2	က	5	15	5	5	9	10	10	10
Carlsbad High	Margaret Stanchi	15		10		5	2	5	2	5	15	5	5	9	10	10	10
	Willis T. Lord	10		10		2	2	5	5	5	15	2	5	2	10	10	10
	Scott Wright	10		10		5	2	5	က	5	15	5	5	10	10	10	10
Hope	Bob Chrisman	09	10	10	10	30	30	30	30	20	20	20	20	20	99	30	30
Jefferson	Carol Van Vooren	40	20	2	2	5	2	5	5	5	5	5	5	2	10	20	5
Kelly	R. Devich	30	30	30	09	45	09	30	09	30	30	15	15	30	09	09	09
Magnolia	Marg Watson	10	10	2	5	10	10	2	5	ည	15	2	10	5	20	10	10
Pacific Rim	Stephen Ahle	45		15	10	19	20	15	15	5	5	5		35			
Vallev Middle	Carolyn Millikin	5				5	15	20	z,	5	15	20	2	2	15	20	5
	Richard Tubbs	10				5	15	15	10	5	10	10	5	5	15	20	10
Averages		24.6	17.1	12.9	15.7	13.0	15.0	11.9	13.9	. 4.0	14.2	8.8	10.0	20.1	36.2	28.5	25.4
Summation of criteria B and C	ia B and C		30	_			27	,    -	!   	·····	23	j	!	}   	65	ļ.,,	1
Averages to be used	-	 20	30			10	25			19	50			20	65		
										ł	ŀ			1			

Conclusion: Findings will go forward to Schedule 1A.

### *Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 15- Post-observation conference with instructor Code 14- Classroom observation of instructor

Code 16- Final conference with instructor

Code 17- District reporting

## Evaluation Criteria

District standards and test results €

Instructional techniques/strategies

Adherence to curricular objectives

Suitable learning environment @ (C) (D)

** Aviara Oaks Elem. -- Data for this schoolsite not averaged in. Data received is total time for all reviews, not a per review average.

1 of 2

PRINT DATE 11/18/2006 CBAD SA 05-06 array

Schedi

ool District 498/83 Stull Act Carlsbad Unified

Fiscal Years: 1997-98 thru 2005-06 Time Study

Purpose: To summarize time spent by "various principals and vice principals" on Stull Act.

Source: SA 1.7-1 Average Timesheets. Findings:

						*	ctivity	*Activity Codes					
	-			15				16				17	
Schoolsite	Staff	∢	Ф	၁	Q	٧	m	ပ	۵	4	m	ပ	
** Aviara Oaks Elem. She	Sheila Maddox		330		330	-	180		180	ļ.,	09		9
Aviara Oaks Middle	Steve VanZant		10	10	10	15	15	7.	<u> </u>	<u></u>	30	30	8 8
Buena Vista							2	2	2	8	3	3	3
Calavera Hills Elem.	Devin Vodicka	5	10	5	10	9	10	10	15	10	10	ıc	ιc
Calavera Hills Middle Erik	Erik Trogden		30		30	30		30		2	2	,	2
Carlsbad Alternative											-		
	Dolores Delgado	20				9				30			
	Tom Bloomquist		10	9	10	5	10	9	5				
Carlsbad High	Margaret Stanchi		10	10	10	5	10	10	5				
	Willis T. Lord		10	10	10	5	10	10	2				
	Scott Wright		10	10	10	2	10	5	5		1		
	Bob Chrisman	20	40	30	30	8	20	30	20	19	20	20	20
rson	Carol Van Vooren	5	5	5	2	က	5	5	5	5	5	2	5
	R. Devich	30	30	30	30	99	30	30	30	09	09	09	09
Magnolia	Marg Watson	3	20	5	2	2	15	2	10	15	15	l LC	1
Pacific Rim	Stephen Ahle		20			20				9	2	)	2
Valley Middle	Carolyn Millikin	5	15	20	5	ည	15	20	5	420			09
	Richard Tubbs	5	15	15	15	5	15	15	10	5	5	5	5
Averages		11.9	16.8	13.3	13.8	14.3	13.8	15.4	10.4	59.5	<b>I</b> ~	1~	24.4
Summation of criteri	and C		30	0	! ! !		[7   	29		  -	[£	1	
Averages to be used		40	30	0		2	25	5		ļ. !	35		

Conclusion: Findings will go forward to Schedule 1A.

### *Activity Codes

Code 11- Preparing for the evaluation

Code 12- Goals and objectives conference with instructor

Code 13- Pre-observation conference with instructor

Code 14- Classroom observation of instructor

Code 15- Post-observation conference with instructor Code 16- Final conference with instructor

Code 17- District reporting

### Evaluation Criteria

District standards and test results

Instructional techniques/strategies (B)

Adherence to curricular objectives

Suitable learning environment 00

** Aviara Oaks Elem. -- Data for this schoolsite not averaged in. Data received is total time for all reviews, not a per review average.

2 of 2

#### ilifornia Department of Education - School Fiscal Services Division

cted Indirect Cost Rates - Five Year Listing
(/ ed March 2005 by CDE based on SACS expenditure data)
Address questions to faisinfo@cde.ca.gov, or call (916) 322-1770.

•					APP	OVED F	RATES	*******
		•	•	Foru	ise with state ar	id federal progr	ams, as allowal	ole. in:
F	T	T	T	2001-02	2002-03	2003-04	2004-05	2005-06
Co.	. CDS	Type*	Name (sorted by CDS code)	(based on 1999-00 expenditure data)	(based on 2000-01 expenditure data)	(based on 2001-02 expenditure data)	(based on 2002-03 expenditure data)	(based on 2003-04 expenditure data)
37	67967	l B	San Diego County Superintendent Alpine Union Elementary	7.73%	8.11%	8.05%	9.84%	8.54%
37	67975	D	Bonsall Union Elementary	2.31%	2.86%	3.46%	3.50%	3.16%
37	67983	D	Borrego Springs Unified	3.42%	4.86%	4.15%	4.54%	4.41%
37	67991	D	Cajon Valley Union Elementary	10.81%	8.30%	5.40%	6.07%	8.52%
37	68007	D	Cardiff Elementary	6.21%	5.42%	4.56%	5.55%	7.46%
37	68023	D	Chula Vista Elementary	5.49%	4.74%	3.68%	3.96%	4.44%
37	68031	D	Coronado Unified	6.34%	5.54%	4.07%	5.36%	4.76%
37	68049		Dehesa Elementary	5.17%	6.01%	8.47%	8.08%	6.29%
37	68056	D	Del Mar Union Elementary	2.95%	3.36%	7.82%	7.45%	5.62%
37	68080	D	Encinitas Union Elementary	4.30%	4.67%	2.44%	5.42%	6.00%
37	68098		Escondido Union Elementary	4.67%	5.00%	4.57%	6.33%	5.04%
37	68106	D	Engandide I I-I I III I	5.54%	4.68%	4.69%	5.75%	4.97%
37	68114	D	Fallbrook Union Elementary	8.08%	6.22%	9:05%	10.22%	8.07%
37	68122		Fallbrook Union High	7.37%	7.61%	5.46%	6.11%	6.69%
37	68130	<u> </u>	Grossmont Union High	6.42%	7.15%	10.46%	11.10%	10.32%
-37	68155	D	Jamui-Duizura Union Elementary	4.32%	1.56%	3.41%	4.68%	5.70%
37	68163	D	Julian Union Elementary	7.21%	7.47%	4.34%	1.28%	4.56%
37	68171	D	Julian Union High	2.30%	5.73%	6.57%	9.26%	6,16%
37	68189	D	Lakeside Union Elementary	3.03%	11.04%	8.04%	4.37%	5.35%
37	68197	D li	_a Mesa-Spring Valley Elementary	4.50%	6.14%	9.03%	8.91%	7.63%
	68205	D	emon Grove Elementary	3.34%	3.35%	3.01%	3.14%	3.64%
1	68213	D	Mountain Empire Unified	4.75%	7.38%	9.96%	11.53%	10.06%
ارز.	68221	D	National Elementary	8.24%	6.39%	5.11%	6.20%	5.68%
	68296	D F	Poway Unified	5.30%	5.73%	6.32%	6.18%	5.85%
	68304		Ramona City Unified	4.64%	4.53%	5.00%	5.17%	5.19%
37	68312	D F	Rancho Santa Fe Elementary	7.09%	5.99%	4.66%	6.62%	7.67%
37	68338	D 5	San Diego City Unified	2.48%	5.33%	6.59%	8.29%	11.03%
37	68346	D S	San Dieguito Union High	3.14%	2.30%	3.19%	3.58%	5.83%
37	68353	D S	San Pasqual Union Elementary	5.57%	5.35%	6.29%	6.54%	7:45%
37	68361	DS	antee Elementary	7.53%	9.39%	4.72%	5.01%	5.82%
37	68379	D S	an Ysidro Elementary	7.13%	7.87%	4.72%	5.14%	7.06%
37	68387	D S	olana Beach Elementary	2.58%	4.35%	5,42%	4.89%	5.58%
37	68395	D S	outh Bay Union Elementary	6.86%	7.90%	6.01%	8.15%	11.18%
37	68403	D S	pencer Valley Elementary	8.46%	5.90%	4.54%	6.11%	6.15%
37	68411	DS	weetwater Union High	6.41%	14.49%	16.09%	15.10%	15.98%
37	68437	D V	allecitos Elementary	4.17%	4.15%	6.06%	4.99%	4.63%
37	68452		sta Unified	9.87%	8.50%	7.47%	8.49%	3.65%
37	73551		arlsbad Unified	3.36%	3.15%	4.09%	4.57%	4.61%
37	73569	D O	ceanside Unified	6.55%	5.70%	5.03%	5.73%	5.83%
37	73791	D Sa	an Marcos Unified	4.94%	5.06%	4.15%	4.53%	4.44%
37	75416	D W	arner Unified	2.75%	3.21%	4.45%	4.07%	3.16%
37	75614		illey Center-Pauma Unified	3.87%	1.33%	5.26%	6.17%	7.42%
			y saind offinod	6.06%	2.01%	1.07%	5.89%	7.98%

^{*} C = County Office of Education; D = District; J = Joint Powers Agency; CA = Common Administration District

¹Rate calculated due to reorganized district(s)

²Rate assigned due to negative rate

1 of 9

## iates

# URSEMENT SERVICES

**ODUCTIVE HOURLY RATE UPDATE** 

as for the FY: 05-06, and the missing rates for FY:04-05.

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ì	

72.08 \$\delta\$ 53.49 \$\delta\$ 55.57

## Carlsbad Unified School District

125.57 ÷		Fisca	Fiscal Years:	
"	Title	04-05	-90	05-06
. 62•785 *	AVERAGE ADMIN ASSISTANT		€	25.79
	AVERAGE BUS DRIVER			
	AVERAGE CLERK (SCHOOLSITE)		<del>6</del>	20.69
	AVERAGE COUNSELOR			
	AVERAGE DIRECTOR		\$	63.80
	AVERAGE HEALTH CLERK		€	22.98
	AVERAGE HIGH SCHOOL PRINCIPAL SECRETARY	-	69	25.26
	AVERAGE OFFICE ASSISTANT		69	18.18
	AVERAGE PRINCIPAL		ь	72.08
	AVERAGE PSYCHOLOGIST			
	AVERAGE SCHOOL (ADM) SECRETARY		89	26.40
	AVERAGE SUBSTITUTE TEACHER			
	AVERAGE VICE-PRINCIPAL		69	53 49
	SUBSTITUTE TEACHER (DAILY RATE WITH BENEFITS)			

## Six _n and Associates

# MANDATE REIMBURSEMENT SERVICES

			Fisca	Fiscal Years:	
	Name	Title	04-05	02-06	90
	AACKER, CHARLES	DIRECTOR-MAINT/OPERATIONS		8	59.32
	ADAMS, GWEN	ASSISTANT PRINCIPAL	\$ 27.31	↔	57.89
	AGUILAR, LUCY	ADMIN ASSISTANT			
	AHLE, STEPHEN	PRINCIPAL - PACIFIC		€	73.27
	BAIMA, LANE	PHYSICAL PERFORMANCE TEST COORDINATOR			
	BASISTA, LISA	ASSISTANT PRINCIPAL			
	BEESON, SHARON	GUIDANCE TECH		÷	15.38
	BLOOMQUIST, THOMAS	ASSISTANT PRINCIPAL		8	66.30
36	BOLING, JEAN MARIE	ADMINISTRATIVE SECRETARY		\$	32.84
<b>າ</b>	BOONE, BILL				
·	BOSS, VICTORIA	LIBRARY TECHNICIAN		€	19.64
	BRUEN, KARIE	COUNSELOR			
	BURNS, HAROLD	LEAD CUSTODIAN			
	BURTIS, GLORIA	STAR TEST COORDINATOR	-		
	CALZIA, SHARON	DP OPERATIONS CLERK		€	33.50
	CAMPBELL-LAHR, BETTY J	SPECIAL PROJECTS COORDINATOR		8	18.95
	CHIRICHETTI, DONNA	HEALTH TECHNICIAN		\$	23.91
	CHRISMAN, KARL ROBERT	PRINCIPAL - HOPE		8	69.79
	CICONTE, JENNIFER	HEALTH TECHNICIAN			

SixTen and Associates te 11/18/2006

## Six_n and Associates

# MANDATE REIMBURSEMENT SERVICES

		Fiscal	Fiscal Years:	
Name	Title	04-05	02-06	
CISNEROS, LAURA	OFFICE ASSISTANT		\$ 19.64	64
CONNALLY, KATHY	LIBRARY TECHNICIAN		\$ 21.68	89
CONROY, LYNN	HEALTH TECHNICIAN		\$ 22.77	12
DAILY, LAURA	OFFICE ASSISTANT			
DANIELS, CANDICE	ADMIN SECRETARY	\$ 22.63	\$ 24.48	48
DAVILA, VERA	OFFICE ASSISTANT	-	\$ 21.65	65
De ANDA, JOSE	PRINCIPAL- BV		\$ 73.27	27
De LUCA, MARY	GUIDANCE TECH		\$ 23.92	92
DELGADO, DELORES	DIR. OF SECONDARY		\$ 75.02	05
DEVICH, ROBERT	PRINCIPAL - KELLY		\$ 69.79	62
DOLKAS, THERESE	REGISTRAR		\$ 31.24	24
DRAWBAUGH, SALLY	ADMINISTRATIVE SECRETARY		\$ 27.03	03
DURHAM, ELLEN	SUPT SECRETARY		\$ 49.46	46
EVANS, AMY	OFFICE CLERK		\$ 20.98	86
FLANAGAN, MELODY	ATTENDANCE CLERK		\$ 19.18	18
FORNELLI, LINDA	RESOURCE NURSE			
FRAZIER, SUSAN	ACCOUNTANTING TECHNICIAN		\$ 26.33	33
FREEMAN, CHERYL	TEST SITE COORDINATOR			
FREEMAN, GAYLEN	DEPUTY SUPERINTENDENT		\$ 87.93	93
				1

## Six_Jn and Associates

# MANDATE REIMBURSEMENT SERVICES

			Fisca	Fiscal Years:	
	Name	Title	04-05	0	05-06
	JIMENO, ALICE	ADMINISTRATIVE SECRETARY		€	25.75
	KRYZAK, JENNIFER	HEALTH TECHNICIAN	\$ 21.00	\$	19.67
	KUHN, MARY	ADMINISTARTIVE SECRETARY-CONFIDENTIAL		€9	30.46
	LANE, KIM	HEALTH TECHNICIAN		€	23.91
	LARSON, JENNIFER	HEALTH TECHNICIAN		€	25.11
	LARSON, LESLIE	HEALTH TECHNICIAN		€	21.68
	LEWIS, RICK	DIRECTOR, INFORMATION SYSTEMS		€	62.28
	LINDLEY, PEGGY	ADMINISTRATIVE SECRETARY		€	28.20
36	LORD, WILLIS (BILL)	ASSISTANT PRINCIPAL		€	64.57
4	LUTZ, CINDY	HEALTH TECHNICIAN		₩.	21.68
	маррох, н	ASST. SUPERINTENDENT			
	MADDOX, SHEILA	PRINCIPAL		€	69.79
	MARSHALL, KIM	PRINCIPAL-VALLEY M			
	MARTINEZ, PAUL	MAINTENANCE III		€>	34.50
	McCORMACK, KATHRYN	LEAD ACCOUNTANT		49	33.68
	McCORMICK, LAURA JEAN	OFFICE ASSISTANT		€9	16.96
	McKEE, CAROLE	STAR ADMINISTRATOR			
	MILLER, BARBARA	DIRECTOR		€9	72.83
<del></del>	MILLIKIN, CAROLYN	PRINCIPAL		₩	73.27

SixTen and Associates te 11/18/2006

## Six_an and Associates

# MANDATE REIMBURSEMENT SERVICES

				Fiscal Years:	
	Ivalile	Title	04-05	90-90	9(
	SANDHAGE, MARIA CECILIA	OFFICE ASSISTANT	\$ 24.28	\$	21.65
	SANTAMARIA, ANDRES	ASSISTANT PRINCIPAL	\$ 56.21	\$	59.53
	SCHROH, MELONY	SCHOOL COUNSELOR			
	SETSER, PHYLLIS E.	ADMIN SECRETARY		₩.	24.51
	SHINTO, DEBRA	ACCT TECHNICIAN		₩	23.93
	SIMS, CYNTHIA	ADMIN SECRETARY		\$	23.35
	SMITH, CURTIS	PRINTING TECHNICIAN		\$	29.77
	SMITH, EMELIA (EMILY)	ADMIN ASSISTANT		8	23.35
36	SONNICH, STEVE	DIRECTOR OF CLASSIFIED PERSONNEL			
5	STANCHI, MARGARET	ASSISTANT PRINCIPAL		\$	19.69
	SWEARINGEN, BARBARA	ADMIN ASSISTANT		€9	23.35
	SWEARINGEN, DOLORES	FOOD SERVICE WORKER		8	16.43
	TALBOT, ALICE	ACCT TECHNICIAN		€	26.33
	TEMPLETON, THOMAS	ACCOUNTING MANAGER			
	TEMPLETON, WILLIAM LANCE	SKILL MAINTENANCE WORKER		\$	30.38
	THOMPSON, TRUDY	ADMIN ASSISTANT		₩	32.84
	TOKORCHECK, JAN	COMPUTER TECHNICIAN		8	32.86
	TROGDEN, ERIC	ASSISTANT PRINCIPAL		8	65.63
	TRUXAW, PEGGY	OFFICE ASSISTANT		8	19.64

SixTen and Associates te 11/18/2006

# Six_n and Associates

# MANDATE REIMBURSEMENT SERVICES

		Fiscal	Fiscal Years:
Name	Title	04-05	05-06
TUBBS, RICHARD	TEACHER, TOSA		\$ 54.61
VAN VOOREN, CAROL	PRINCIPAL		\$ 69.79
VAN ZANT, STEVEN	PRINCIPAL		\$ 73.27
VILLAMAR, OFILIA	OFFICE ASSISTANT	4	\$ 16.96
VODICKA, DEVIN	PRINCIPAL		\$ 73.27
WADE, ВЕТН	ADMIN SCHOOL SECRETARY		
WADE, PATRICIA	INSTRUCTIONAL AIDE		\$ 18.69
WALLACE, AUTUMN	ADMINISTRATIVE ASSISTANT		\$ 23.80
WALLS, SHARON	PERSONNEL SPECIALIST		\$ 31.28
WARNER, MARLENE	LIBRARY TECHNICIAN		\$ 25.11
WARREN, DEBORAH	TEST SITE COORD		
WATSON, MARGARET	PRINCIPAL		\$ 66.14
WRIGHT, CHARLES SCOTT	PRINCIPAL - CARLSBAD		\$ 82.43
YODER, KAREN	ADMIN ASSISTANT		\$ 24.51
ZAK, SHARON	TEST SITE COORDINATOR		
			:

366

SixTen and Associates te 11/18/2006

#### **DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On June 19, 2105, I served the:

IRC Filing; and Notice of Complete Filing and Schedule for Comments

Incorrect Reduction Claim

The Stull Act, 14-9825-I-02

Education Code Sections 44660-44665;

Statutes 1983, Chapter 498; Statutes 1999, Chapter 4

Fiscal Years: 2005-2006, 2006-2007, 2007-2008, and 2008-2009

Carlsbad Unified School District, Claimant

by making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on June 19, 2015 at Sacramento, California.

Jill L./Magee

Commission on State Mandates 980 Ninth Street, Suite 300 Sacramento, CA 95814

(916) 323-3562

6/19/2015 Mailing List

#### **COMMISSION ON STATE MANDATES**

#### **Mailing List**

Last Updated: 6/17/15

**Claim Number:** 14-9825-I-02

Matter: The Stull Act

Claimant: Carlsbad Unified School District

#### TO ALL PARTIES, INTERESTED PARTIES, AND INTERESTED PERSONS:

Each commission mailing list is continuously updated as requests are received to include or remove any party or person on the mailing list. A current mailing list is provided with commission correspondence, and a copy of the current mailing list is available upon request at any time. Except as provided otherwise by commission rule, when a party or interested party files any written material with the commission concerning a claim, it shall simultaneously serve a copy of the written material on the parties and interested parties to the claim identified on the mailing list provided by the commission. (Cal. Code Regs., tit. 2, § 1181.3.)

#### Socorro Aquino, State Controller's Office

Division of Audits, 3301 C Street, Suite 700, Sacramento, CA 95816

Phone: (916) 322-7522 SAquino@sco.ca.gov

#### Marieta Delfin, State Controller's Office

Division of Accounting and Reporting, 3301 C Street, Suite 700, Sacramento, CA 95816

Phone: (916) 322-4320 mdelfin@sco.ca.gov

#### **Donna Ferebee**, Department of Finance

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Phone: (916) 445-3274 donna.ferebee@dof.ca.gov

#### Chris Ferguson, Department of Finance

Education Systems Unit, 915 L Street, 7th Floor, 915 L Street, 7th Floor, Sacramento, CA

95814

Phone: (916) 445-3274 Chris.Ferguson@dof.ca.gov

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Jay Lal, State Controller's Office (B-08)

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Phone: (916) 445-0328 Yazmin.meza@dof.ca.gov

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Phone: (916) 446-7517 robertm@sscal.com

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Education Section, 925 L Street, Suite 1000, Sacramento, CA 95814

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Andy Nichols, Nichols Consulting

1857 44th Street, Sacramento, CA 95819

Phone: (916) 455-3939

andy@nichols-consulting.com

Suzanne O'Connell, Deputy Superintendent Administrative Services, Carlsbad Unified

School District

6225 El Camino Real, Carlsbad, CA 92009-1604

Phone: (760) 331-5036 soconnell@carlsbadusd.net

Christian Osmena, Department of Finance

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Phone: (916) 445-0328 christian.osmena@dof.ca.gov

**Arthur Palkowitz**, Stutz Artiano Shinoff & Holtz

6/19/2015 Mailing List

2488 Historic Decatur Road, Suite 200, San Diego, CA 92106

Phone: (619) 232-3122 apalkowitz@sashlaw.com

Keith Petersen, SixTen & Associates

**Claimant Representative** 

P.O. Box 340430, Sacramento, CA 95834-0430

Phone: (916) 419-7093 kbpsixten@aol.com

Sandra Reynolds, Reynolds Consulting Group, Inc.

P.O. Box 894059, Temecula, CA 92589

Phone: (951) 303-3034 sandrareynolds_30@msn.com

David Scribner, Max8550

2200 Sunrise Boulevard, Suite 240, Gold River, CA 95670

Phone: (916) 852-8970 dscribner@max8550.com

Jim Spano, Chief, Mandated Cost Audits Bureau, State Controller's Office

Division of Audits, 3301 C Street, Suite 700, Sacramento, CA 95816

Phone: (916) 323-5849 jspano@sco.ca.gov

Dennis Speciale, State Controller's Office

Division of Accounting and Reporting, 3301 C Street, Suite 700, Sacramento, CA 95816

Phone: (916) 324-0254 DSpeciale@sco.ca.gov



RECEIVED
October 02, 2015
Commission on
State Mandates

LATE FILING

October 2, 2015

Heather Halsey Executive Director Commission on State Mandates 980 Ninth Street, Suite 300 Sacramento, CA 95814

Re: Incorrect Reduction Claim (IRC)

The Stull Act, 14-9825-I-02

Education Code Sections 44660-44665;

Statutes 1983, Chapter 498; Statutes 1999, Chapter 4

Fiscal Years: 2005-2006, 2006-2007, 2007-2008, and 2008-09

Carlsbad Unified School District, Claimant

Dear Ms. Halsey:

The State Controller's Office is transmitting our response to the above-named IRC.

If you have any questions, please contact me by telephone at (916) 323-5849.

Sincerely,

JIM L. SPANO, Chief

Mandated Cost Audits Bureau

**Division of Audits** 

JS/as

16066

Attachment

#### RESPONSE BY THE STATE CONTROLLER'S OFFICE TO THE INCORRECT REDUCTION CLAIM (IRC) BY CARLSBAD UNIFIED SCHOOL DISTRICT

#### **Stull Act Program**

#### **Table of Contents**

<u>Description</u>	<u>Page</u>
State Controller's Office Response to School District's Comments	
Declaration	Tab 1
State Controller's Office Analysis and Response	Tab 2
Commission on State Mandates' Statement of Decision, The Stull Act, May 27, 2004	Tab 3
State Controller's Office Entrance Conference Start Letter	Tab 4
State Controller's Office Summary of Adjustments FY 2005-06, FY 2006-07, FY 2007-08, and FY 2008-09	Tab 5
State Controller's Office Analysis of the District's Time Study	Tab 6
State Controller's Office Analysis of Allowable and Unallowable Evaluations Claimed FY 2005-06, FY 2006-07, FY 2007-08, and FY 2008-09	d Tab 7

Note: References to Exhibits relate to the district's IRC filed on June 9, 2015, as follows:

- Exhibit A PDF pg. 23
- Exhibit B PDF pg. 28
- Exhibit C PDF pg. 37
- Exhibit D PDF pg. 56
- Exhibit E PDF pg. 85
- Exhibit F PDF pg. 184
- Exhibit G PDF pg. 270
- Exhibit H PDF pg. 338

### Tab 1

1	OFFICE OF THE STATE CONTROLLER							
2	3301 C Street, Suite 725 Sacramento, CA 95816							
3	Telephone No.: (916) 324-8907							
4	BEFOI	RE THE						
5	COMMISSION ON	STATE MANDATES						
6	COMMISSION ON STATE MANDATES  STATE OF CALIFORNIA							
7	STATE OF CALIFORNIA							
8		<b>1</b>						
9	, ·							
10	INCORRECT REDUCTION CLAIM (IRC) ON:	No.: IRC 14-9825-I-02						
11	The Stull Act Program	AFFIDAVIT OF BUREAU CHIEF						
12	Education Code Sections 44660 – 44665;							
13	(Chapter 498, Statutes of 1983; and Chapter 4, Statutes of 1999)							
14								
15	CARLSBAD UNIFIED SCHOOL DISTRICT, Claimant							
16								
17								
18	I, Jim L. Spano, make the following declarat	ions:						
19	<ol> <li>I am an employee of the State Controller years.</li> </ol>	's Office (SCO) and am over the age of 18						
20	2) I am currently employed as a bureau chie	ef and have been so since April 21, 2000						
21	2) I am currently employed as a bureau chief, and have been so since April 21, 2000. Before that, I was employed as an audit manager for two years and three months.							
22								
23	4) I reviewed the work performed by the SO	CO auditor.						
24		copies of records, as provided by Carlsbad						
25	Unified School District or retained at our	r place of business.						
		1						

- 6) The records include claims for reimbursement, along with any attached supporting documentation, explanatory letters, or other documents relating to the above-named IRC.
- 7) A field audit of the claims for fiscal year (FY) 2005-06, FY 2006-07, FY 2007-08, and FY 2008-09 commenced on June 24, 2010, (entrance start letter date) (**Tab 4**) and was completed on June 15, 2012 (issuance of final audit report) (**Exhibit D**).

I do declare that the above declarations are made under penalty of perjury and are true and correct to the best of my knowledge, and that such knowledge is based on personal observation, information, or belief.

Date: October 2, 2015

OFFICE OF THE STATE CONTROLLER

Jim L. Spano, Chief

Mandated Cost Audits Bureau

**Division of Audits** 

State Controller's Office

### Tab 2

#### STATE CONTROLLER'S OFFICE ANALYSIS AND RESPONSE TO THE INCORRECT REDUCTION CLAIM BY CARLSBAD UNIFIED SCHOOL DISTRICT

For Fiscal Year (FY) 2005-06, FY 2006-07, FY 2007-08, and FY 2008-09

### The Stull Act Program Education Code Sections 44660 – 44665 (Statutes of 1983, Chapter 498; Statutes of 1999, Chapter 4)

#### **SUMMARY**

The following is the State Controller's Office's (SCO) response to the Incorrect Reduction Claim (IRC) that Carlsbad Unified School District submitted on June 9, 2015. The SCO audited the district's claims for costs of the State-mandated Stull Act Program for the period of July 1, 2005, through June 30, 2009. The SCO issued its final report on June 15, 2012 (Exhibit D).

The district submitted reimbursement claims totaling \$512,761—\$105,192 for FY 2005-06 (Exhibit H), \$168,221 for FY 2006-07 (Exhibit G), \$136,502 for FY 2007-08 (Exhibit F), and \$102,846 for FY 2008-09 (Exhibit E). Subsequently, the SCO audited these claims and determined that \$238,660 is allowable and \$274,101 is unallowable, primarily because the district claimed reimbursement for activities not reimbursable under the mandated program.

The following table summarizes the audit results:

Cost Elements	 tual Costs	 llowable er Audit	_ <b>A</b> d	Audit justments
July 1, 2005, through June 30, 2006				
Direct costs:				
Salaries and Benefits Evaluation activities Training	\$ 97,325 2,193	\$ 54,081 2,193	\$	(43,244)
Total direct costs Indirect costs	 99,518 5,674	56,274 3,281		(43,244) (2,393)
Total program costs	\$ 105,192	59,555	\$	(45,637)
Less amount paid by the State ¹ Allowable costs claimed in excess of (less than) amount paid		\$ 59,555		

July 1, 2006, through June 30, 2007			
Direct costs:			
Salaries and Benefits			
Evaluation activities	\$ 155,019	\$ 37,956	\$ (117,063)
Training	2,965	2,775	(190)
Total direct costs Indirect costs	157,984	40,731	(117,253)
Total program costs	10,237	2,639	(7,598)
	\$ 168,221	43,370	\$ (124,851)
Less amount paid by the State ¹			
Allowable costs claimed in excess of (less than) amount paid		\$ 43,370	
July 1, 1999, through June 30, 2000			
Direct and indirect costs:			
	Actual Costs	Allowable	Audit
Cost Elements			
Cost Elements	Claimed	Per Audit	Adjustments
July 1, 2007, through June 30, 2008			
Direct costs:			
Salaries and Benefits			
Evaluation activities	\$ 128,560	\$ 70,602	\$ (57,958)
Training	1,640	1,549	(91)
Total direct costs Indirect costs	130,200 6,302	72,151 3,492	(58,049)
Total program costs	\$ 136,502	75,643	(2,810)
	\$ 130,302	13,043	\$ (60,859)
Less amount paid by the State ¹			
Allowable costs claimed in excess of (less than) amount paid		\$ 75,643	
	Actual Costs	Allowable	Audit
Cost Elements	Claimed	Per Audit	Adjustments
July 1, 2008, through June 30, 2009			
Direct costs:			
Salaries and Benefits			
Evaluation activities	\$ 96,252	\$ 56,594	\$ (39,658)
Training	608		(608)
Total direct costs Indirect costs	96,860	56,594	(40,266)
	5,986	3,498	(2,488)
Total program costs	\$ 102,846	60,092	\$ (42,754)
Less amount paid by the State ¹		(60,092)	
Allowable costs claimed in excess of (less than) amount paid		\$ -	

	Ac	tual Costs	A	llowable		Audit
Cost Elements	. (	Claimed	_ <u>P</u>	er Audit	A	djustments
July 1, 2005, through June 30, 2009						
Direct costs:						
Salaries and Benefits						
Evaluation activities	\$	477,156	\$	219,233	\$	(257,923)
Training		7,406		6,517		(889)
Total direct costs		484,562		225,750		(258,812)
Indirect costs		28,199		12,910		(15,289)
Total program costs	\$	512,761		238,660	\$	(274,101)
Less amount paid by the State ¹				(60,092)		
Allowable costs claimed in excess of (less than) amount paid			\$	178,568		

#### I. THE STULL ACT PROGRAM CRITERIA

#### **Parameters and Guidelines**

Chapter 498, Statutes of 1983, and Chapter 4, Statutes of 1999, added Education Code sections 44660–44665. The legislation provided reimbursement for specific activities related to evaluation and assessment of the performance of "certificated personnel" within each school district, except for those employed in local, discretionary educational programs.

The program's parameters and guidelines establish the State mandate and define reimbursement criteria. The CSM adopted the parameters and guidelines on September 27, 2005 (Exhibit B).

The Commission approved reimbursable activities as follows:

- Evaluate and assess the performance of certificated instructional employees who perform the
  requirements of educational programs mandated by state or federal laws as it reasonably relates
  to the instructional techniques and strategies used by the employee and the employee's
  adherence to curricular objectives (Education Code section 44662(b) as amended by Chapter
  498, Statutes of 1983).
- Evaluate and assess the performance of certificated instructional employees who teach reading, writing, mathematics, history/social science, and science in grades 2 through 11 as it reasonably relates to the progress of pupils toward the State-adopted academic content standards as measured by State-adopted assessment tests (Education Code section 44662(b) as amended by Chapter 4, Statutes of 1999).
- Assess and evaluate permanent certificated, instructional, and non-instructional employees
  who perform the requirements of educational programs mandated by state or federal law and
  receive an unsatisfactory evaluation in the years in which the permanent certificated employee
  would not have otherwise been evaluated pursuant to Education Code section 44664. The
  additional evaluations shall last until the employee achieves a positive evaluation, or is
  separated from the school district (Education Code section 44664 as amended by Chapter 498,
  Statutes of 1983).

¹ Payment information current as of September 17, 2015.

These parameters and guidelines are applicable to the district's FY 2005-06, FY 2006-07, FY 2007-08, and FY 2008-09 claims.

#### **SCO Claiming Instructions**

In compliance with Government Code section 17558, the SCO issues claiming instructions to assist local agencies and school districts in claiming mandated program reimbursable costs. For the Stull Act program, the SCO issued claiming instructions on December 12, 2005 (Exhibit C). Subsequent claiming instructions are believed to be, for the purposes and scope of this incorrect reduction claim, substantially similar to the version extant at the time the claims, which are subject of this incorrect reduction claim, were filed.

#### II. OVERSTATED SALARIES AND BENEFITS AND RELATED INDIRECT COSTS

#### (PART A: TIME STUDY ACTIVITIES)

#### <u>Issue</u>

The SCO determined that the district overstated salaries and benefits and related indirect costs by \$274,101 for the audit period (**Tab 5**). The SCO concluded that the district's costs were unallowable primarily because the district claimed reimbursement for activities not reimbursable under the mandated program.

In an IRC filed on June 9, 2015, the district presented an argument that some of the activities, which the SCO determined unallowable, should be reimbursable under the mandated program.

The following table summarizes the claimed, allowable, and audit adjustment amounts for the audit period:

Cost Elements	Actual Costs  Claimed	Allowable Per Audit	Audit Adjustments	
Salaries and benefits: Evaluation activities Training	\$ 477,156	\$ 219,233	\$ (257,923)	
	7,406	6,517	(889)	
Total direct costs Indirect costs	484,562	225,750	(258,812)	
	28,199	12,910	(15,289)	
Total costs	\$ 512,761	\$ 238,660	\$ (274,101)	

#### **SCO Analysis:**

Initially, all costs claimed by the district were unallowable because they were based on average time increments supported with time records that were not completed contemporaneously. The district conducted a time study in FY 2010-11 as a substitute for records of actual time spent on teacher evaluations. The results of the time study were applied to the audit period.

The time study documented the time it took district evaluators to perform 22 separate activities of the teacher evaluation process. The time study results reported time for training, planning, preparation, meetings, observation, report writing, and other activities within the evaluation process. We determined that 19 activities reported in the time study were unallowable (**Tab 6**).

The district claimed costs primarily for evaluation activities under section IV.A.1 of the parameters and guidelines. The parameters and guidelines allow reimbursement under this component for the district to evaluate and assess the performance of certificated instructional employees as it reasonably relates to the instructional techniques and strategies and adherence to curricular objectives. The parameters and guidelines outline specific activities and time frames for such evaluations. We believe that costs related to additional activities not listed in the parameters and guidelines as reimbursable should not be included as allowable costs under this cost component. Therefore, we believe that various preparation and conference activities claimed are not reimbursable, as they are not listed as allowable activities in the parameters and guidelines.

#### District's Response

#### PART A: TIME STUDY ACTIVITIES

In response to the Controller's exclusion at the beginning of the audit of all of the original claim documentation, the District with the agreement of the auditor, prepared a time study based on the FY 2010-11 certificated staff evaluation cycle. The time study identified 22 discrete activities established as a result of staff interviews. Actual time spent on these activities was collected from the employees involved. An average time spent for each of these activities was calculated. These average times per activities were assigned to relevant job title or group of titles for purposes of determining the appropriate productive hourly rate to be applied to each activity. However, the audit report allows only 3 of the 22 time study activities. This is a major single source of adjustment to the claimed costs.

#### 3 Activities Allowed

- 1. Conducting "informal" classroom observations
- 2. Conducting "formal" classroom observations
- 3. Writing Final Evaluation Reports and/or preparing Teacher Evaluation Reports

#### 19 Disallowed Activities

- 1. Preparing before training or planning meetings / conferences;
- 2. Training or planning meetings / conferences:
- 3. Preparing / organizing notes from training or planning meetings / conferences;
- Preparing before meetings with teachers;
- 5. Conducting actual conference with teachers;
- 6. Preparing or organizing notes from meetings with teachers;
- 7. Preparing before "Pre-Observation" conferences with teachers;
- 8. Conducting "Pre-Observation" conferences with teachers;
- 9. Preparing / organizing notes from "Pre-Observation" conferences with teachers;
- 10. Preparing before classroom observations of teachers;
- 11. Preparing / organizing notes from classroom observations, finalizing Collect Data forms;
- 12. Reporting observations, preparing the Standards for Excellence in Teaching observation checklists;
- 13. Preparing before "Post-Observation" conferences with teachers;
- 14. Conducting "Post-Observation" conferences with teachers;
- 15. Preparing notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets;
- 16. Preparing before Final Evaluation conferences with teachers;
- 17. Conducting Final Evaluation conferences with teachers;
- 18. Preparing / organizing notes from Final Evaluation conferences with teachers; and
- 19. Discussing the STAR results with teachers and assessing how to improve instructional abilities.

These 19 activities can be organized into four groups of related activities:

#### 1. Evaluation Conferences

Evaluation conferences are a method of implementing this mandate, and not just a subject matter activity. The audit report (A.R., p. 7) concluded that:

Conferences between the evaluators and teachers also are not reimbursable because they were required before the enactment of the test claim legislation. These activities are not imposing a new program or higher level of service. Conferences, as well as pre-, post-, final observation conferences, and conference-related activities are not reimbursable.

The Controller has confused the subject matter of the old and new mandates with the method of implementation. The Commission has already determined (SOD, p. 29, 30) that:

Under prior law, the evaluation had to be reduced to writing and a copy of the evaluation given to the employee. An evaluation meeting had to be held between the certificated employee and the evaluator to discuss the evaluation and assessment.

The 1983 test claim statute still requires school districts to reduce the evaluation to writing, to transmit a copy to the employee, and to conduct a meeting with the employee to discuss the evaluation and assessment. These activities are not new. However, the 1983 test claim statute amended the evaluation requirements by adding two new evaluation factor: the instructional techniques and strategies used by the employee, and the employees adherence to curricular objectives. Thus, school districts are now required by the state to evaluate and assess the competency of certificated instructional employees as it reasonably relates to:

- o the progress of students toward the established standards of expected student achievement at each grade level in each are of study;
- o the instructional techniques and strategies used by the employee;
- o the employee's adherence to curricular objectives; and
- o the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities.

School districts may have been evaluating teachers on their instructional techniques and adherence to curricula r objectives before the enactment of the test claim statute based on the evaluation guidelines developed through the collective bargaining process. But, the state did not previously require the evaluation in these two areas. Government Code section 17565 states that "if a ... school district, at its option, has been incurring costs which are subsequently mandated by the state, the state shall reimburse the ... school district for those costs after the operative date of the mandate." Emphasis added.

Therefore, the fact that districts used evaluation conferences to implement the previous mandated activities does not exclude reimbursement to use the same method to implement the new activities. The approved mandate reimburses the new program requirement to "evaluate and assess" which necessarily involves a comprehensive process. The conferences are related tasks are effective and efficient methods to evaluate and assess employees and necessary to communicate the findings of the evaluation to the employee. Even if conferences were part of previous evaluation procedures the subject matter of these conferences is now different as a result of the changes to the Stull Act.

#### 2. Preparation Activities

The audit report (A.R., p. 7) concluded that: "(t)he activities related to planning, preparation, and organizing notes are not reimbursable under the mandate." Further, (A.R., p. 13) that "reimbursement is limited to only those activities outlined in the parameters and guidelines (section IV.A.1, IV.A.2, and IV.B.1)." For purposes of the time study, preparation time was isolated to improve the accuracy of the results. The preparation time could have been logically merged with the activity relevant to the preparation. Preparation time was not explicitly considered or denied by the Commission statement of decision. The parameters and guidelines document enumerates the *subject matter* of the evaluation process and not the entire process to implement the mandate. There are no conditions or limitations stated on the nature of the staff time reimbursable, that is, planning and preparation time is not excluded in the parameters and guidelines. Even the Controller characterizes the parameters and guidelines as an "outline." Preparation is a rational, relevant, reasonable and necessary part of implementing the mandated activities in the usual course of business and the Controller has stated no basis to exclude it from the scope of the evaluation process.

#### 3. Training Activities

The audit report (A.R., P. 7) concluded that:

The district duplicated costs by including training activities in its time study and again as a direct cost item in each fiscal year. Further, training time reported in the time study is not an activity repetitive in nature and is not appropriate for a time study. We determined allowable time spent on training from the district's original claims.

The audit report allows most of the training costs as direct costs. The District does not dispute removal of the training time from the time study.

#### 4. STAR Testing Results

The audit disallows the time to review the STAR test results without explanation. The Commission (SOD, p. 32) determined that "the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664 ..." is reimbursable.

#### SCO's Comment

The district addresses the same general argument already discussed in the audit report. The district disagrees with our determination that preparation and conference activities are not reimbursable under this mandated program.

#### **Evaluation Conferences**

The district's states in its comments that "the mandate reimburses the new program requirement to 'evaluate and assess' which necessarily involves a comprehensive process." The district also states that the conferences and related activities are reasonable methods to implement the required activities. We disagree. Not all activities from the evaluation process are reimbursable.

The program's parameters and guidelines (section IV.A.1, IV.A.2, and IV.B.1) specify that reimbursement is limited to only those activities outlined in each section. Section IV.B.1 identifies reimbursable evaluation conferences only for those instances, in which an unsatisfactory evaluation resulted for certificated instructional or non-instructional personnel in those years, in which the employee would not have otherwise been evaluated (**Exhibit B**). The district did not report any unsatisfactory evaluations under section IV.B.1 in its claims.

The district claimed costs for the conferences resulting from evaluations completed under sections IV.A.1 and IV.A.2 of the parameters and guidelines. These sections do not identify evaluation conferences, or any other types of conferences, as reimbursable activities. Furthermore, the Commission found in its statement of decision (**Tab 3**) that conferences between the evaluators and teachers are not reimbursable because they were required before the enactment of the test claim legislation.

Under prior law, the evaluation was to be prepared in writing and a copy of the evaluation was to be given to the employee. A meeting was to be held between the certificated employee and the evaluator to discuss the evaluation and assessment. The Commission indicated in its statement of decision that (Tab 3):

...the 1975 test claim legislation did not amend the requirements in Former Education Code sections 13488 and 13489 to prepare written evaluations of certificated employees, receive responses to those evaluations, and conduct a meeting with the certificated employee to discuss the evaluation...

The 1983 test claim statute still requires school districts to prepare the evaluation in writing, to transmit a copy to the employee, and to conduct a meeting with the employee to discuss the evaluation and assessment. These activities are not new.

However, the 1983 test claim statute amended the evaluation requirements by adding two new evaluation factors relating to 1) the instructional techniques and strategies used by the employee, and 2) the employee's adherence to curricular objectives. The Commission found that Education Code section 44662, subdivision (b), as amended by Statutes of 1983, Chapter 498, imposed a new requirement on school districts to:

...evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state and federal law as it reasonably relates to the instructional techniques an strategies used by the employee and the employee's adherence to curricular objectives.

Reimbursement is limited to the additional requirements imposed by the amendments. The additional requirements include the review of the employee's instructional techniques and strategies and adherence to curricular objectives (typically via observation activity), and to include in the written evaluation of the certificated instructional employees the assessment of only these factors. Conference activities do no impose a new program or higher level of service and are not listed as reimbursable activities.

#### Preparation Activities

The district states in its comments that "preparation is a rational, relevant, reasonable, and necessary part of implementing the mandated activities." The district also states that "planning and preparation time is not excluded in the parameters and guidelines."

While the district states that preparation activities are "reasonable and necessary" activities, the reimbursement is limited to only those activities outlined in the parameters and guidelines (sections IV.A.1, IV.A.2, and IV.B.1). The parameters and guidelines do not list any preparation activities as reimbursable (**Exhibit B**). The district may file an amendment with the Commission on State Mandates to amend the existing parameters and guidelines.

#### **Training Activities**

The district does not dispute removal of the training time from the time study.

#### **STAR Testing Results**

The district is correct that "the review of the results of the STAR test..." is an allowable activity, per the program's parameters and guidelines. However, the district claimed reimbursement for activity of "discussing the STAR results with teachers and how to improve instructional abilities." The district did not claim any activity that is reimbursable because these two activities are not interchangeable. Reimbursement for the activity IV.A.2 is limited to "review of the results of the STAR test... and to include in the written evaluation... the assessment of the employee's performance based on the STAR results..." (Exhibit B) Reviewing the results of the STAR tests and assessing the employee's performance based on the STAR results is a process performed by the evaluator to help develop the overall assessment of the employee during their evaluation period. The activity of discussing the STAR results implies that a collaborative meeting or conference took place. We believe conference activities are not reimbursable, as they are not listed as allowable activities in the respective section of the program's parameters and guidelines.

#### III. OVERSTATED SALARIES AND BENEFITS AND RELATED INDIRECT COSTS

#### (PART B: COMPLETED EVALUATIONS)

#### <u>Issue</u>

The SCO determined that the district overstated salaries and benefits and related indirect costs by \$274,101 for the audit period (**Tab 5**). The SCO concluded that the district's costs were unallowable primarily because the district claimed reimbursement for activities not reimbursable under the mandated program. In addition, the SCO concluded that some evaluations identified in the district's time study are not reimbursable under the mandated program. The district's time study included 660 evaluations, and our audit determined that 46 evaluations were unallowable for the audit period. (**Tab 7**)

In an IRC filed on June 9, 2015, the district presented an argument that some of the evaluations, which the SCO determined unallowable, should be reimbursable under the mandated program.

The following table summarizes the number of evaluations claimed and allowable per fiscal year:

	Number of Evaluations				
Fiscal Year	Per Time Study	Allowable Per Audit	Adjustments		
2005-06	178	160	(18)		
2006-07	112	106	(6)		
2007-08	209	201	(8)		
2008-09	161	147	(14)		
Total	. 660	614	(46)		

#### **SCO Analysis:**

The district used Certificated Evaluation Log spreadsheets to keep track of completed evaluations. We reviewed the Evaluation Logs for each fiscal year to ensure that only eligible evaluations were counted for reimbursement (**Tab 7**). We concluded that 46 evaluations were not reimbursable per the program's parameters and guidelines.

The district claimed costs primarily for evaluation activities under section IV.A.1 of the parameters and guidelines. This section allows reimbursement for evaluations conducted for certificated instructional personnel who perform the requirements of educational programs mandated by state or federal law during specific evaluation periods. We believe that 46 excluded evaluations did not meet reimbursement criteria for one or more reasons, including:

- Evaluation included non-instructional personnel
- Evaluations included teachers working in educational programs not mandated by state or federal law
- Evaluations claimed more frequently than the timelines outlined in the parameters and guidelines

#### District's Response

#### PART B: COMPLETED EVALUATIONS

The auditor used the District's Certificated Evaluation Log spreadsheets, which reported 660 evaluations for the four fiscal years. The audit report disallowed 46 and approved 614 evaluations. The non-reimbursable evaluations were grouped into five categories, although the number of evaluations by type are not enumerated in the audit report:

1. Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated instructional employees.

The audit report (A.R., p. 15) asserts that these certificated employees are not instructional personnel because:

The intent of this component is to evaluate the elements of classroom instruction. Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists <u>do not provide classroom instruction</u> and are considered "non-instructional" certificated personnel. <u>Emphasis added</u>.

The Controller is in error. The Commission has determined (SOD, p. 21, 22) that "certificated employees" include all credentialed personnel involved in the education process:

As enacted, the Stull Act was placed in Chapter 2 of Division 10 of the 1971 Education Code, a chapter addressing "Certificated Employees." Certificated employees are those employees directly involved in the educational process and include both instructional and non-instructional employees such as teachers, administrators, supervisors, and principals." Certificated employees must be properly credentialed for the specific position they hold. A "certificated person" was defined in former Education Code section 12908 as a "person who holds one or more documents such as a certificated, a credential, or a life diploma, which singly or in combination license the holder to engage in the school service designated in the document or documents." The definition of "certificated person" governs the construction of Division 10 of the former Education Code and is not limited to instructional employees.

The Statement of Decision (18, 19) also cites Education Code section 13487, which narrows the definition of noninstructional personnel as those certificated persons who are supervisory and administrative personnel:

Former Education Code section 13487 was also repealed and reenacted by Statutes 1975, chapter 1216, as follows (amendments relevant to this issue are underlined):

- a) The governing board of each school district shall establish standards of expected student achievement at each grade level in each area of study.
- b) The governing board of each school district shall evaluate and assess certificated employee competency as it reasonably relates to (1) the progress of students toward the established standards, (2) the performance of those noninstructional duties and responsibilities, including supervisory and advisory duties, as my be prescribed by the board, and (3) the establishment and maintenance of a suitable learning environment within the scope of the employee's responsibilities.
- c) The governing board of each school district shall establish and define job responsibilities for those certificated noninstructional personnel, including but not limited to, supervisory and administrative personnel, whose responsibilities cannot be evaluated appropriately under the provisions of subdivision (b), and shall evaluate and assess the competency of such noninstructional employees as it reasonably relates to the fulfillment of those responsibilities....

Without foundation in fact or law, the Controller has determined that certificated personnel who are not supervisors or administrators are also not "instructional" personnel because they may not provide full time classroom instruction. The Stull Act does not make this distinction and neither did the Commission. It has not been established as a matter of law that involvement in the educational process requires a "classroom."

2. Preschool teachers do not perform the requirements of the program. The audit report (A.R., p. 15) excludes preschool teachers in general based on the Controller's opinion that preschool teachers do not perform the requirements of an educational program mandated by state or federal law. The parameters and guidelines (p. 3) state that:

The Commission further found that the activities listed above do not constitute reimbursable state-mandated programs with respect to certificated personnel employed in local, discretionary educational programs.

The Commission (SOD, p. 11) identified the voluntary programs in footnote 42 and preschool is not included in that enumeration. In addition, the Stull Act only explicitly excluded (SOD 17, 18) community college certificated employees, hourly adult education instructors, and hourly and temporary certificated employees and substitute teachers, but at the discretion of the local governing board. There is no stated basis to exclude certificated preschool teachers.

- 3. Duplicate teacher evaluations claimed multiple times in one school year. The district concurs that for purposes of the Stull Act reimbursement only one complete evaluation should be counted for each probationary employee in one school year and does not dispute these properly disallowed evaluations, if any.
- 4. Permanent biannual teacher evaluations claimed every year rather than every other year. The District concurs that for purposes of the Stull Act reimbursement only one complete evaluation should be counted every other year for each employee after the employee attains permanent status and does not dispute these properly disallowed evaluations, if any.

5. Permanent five-year teacher evaluations claimed multiple times in a five-year period rather than once every five years. The District concurs that for purposes of the Stull Act reimbursement only one complete evaluation should be counted for each permanent employee every fifth year after the employee attains fifth-year permanent status and does not dispute these properly disallowed evaluations, if any.

#### SCO's Comment

The district addresses the same general argument already discussed in the audit report. The district disagrees with our determination that some evaluations claimed are not reimbursable under this mandated program.

#### Non-instructional certificated personnel

The district disagrees with our determination that performance evaluations for non-instructional personnel, such as principals, vice principals, coordinators, directors, counselors, psychologists, librarians, and library media specialists are not reimbursable for the activity IV.A.1 and IV.A.2 of the parameters and guidelines. The district provided a quote from the Commission's statement of decision (pps. 21-22) that certificated employees are those employees directly involved in the educational process and include both instructional and non-instructional employees. The district concludes that non-instructional employees' evaluations should also be reimbursable. We disagree.

The district uses the statement of decision's quote out of context. Pages 16 through 25 of the statement of decision examine whether any evaluation costs associated with certificated non-instructional personnel represent increased costs as a result of the test claim and whether such costs should be reimbursable (**Tab 3**). While the district is correct that the Commission stated that certificated employees include both instructional and non-instructional personnel, the district does not put the quote in the correct context as used in the statement of decision. The Commission provides the following statement concluding the analysis relevant to non-instructional personnel evaluation costs (Statement of Decision, p. 25):

... the Commission finds that school districts were required under prior law to perform the following activities:

- Develop and adopt specific evaluation and assessment guidelines for the performance of certificated non-instructional personnel.
- Evaluate and assess certificated non-instructional personnel as it relates to the established standards.
- Prepare and draft written evaluation of the certificated non-instructional employee.
   The evaluation shall include recommendations, if necessary, as to areas of improvement.
- Receive and review from a certificated non-instructional employee written responses regarding the evaluation.
- Prepare and hold a meeting between the certificated non-instructional employee and the evaluator to discuss the evaluation and assessment.

The Commission further finds that the language added to former Education Code section 13487 by the 1975 test claim legislation to "establish and define job responsivities" for certificated non-instructional personnel falls within the preexisting duty to develop and adopt objective evaluation and assessment guidelines for all certificated employees, does not mandate any new required acts, and thus, does not constitute a new program or higher level of service.

Accordingly, the Commission finds that the 1975 and 1986 amendments to former Education Code sections 13485 and 13487 and Education Code section 44663 as they relate to certificated non-instructional employees do not constitute a new program or higher level of service.

The Commission clearly states that evaluation costs associated with routine evaluations of certificated non-instructional personnel are not reimbursable. The parameters and guidelines, sections IV.A.1 and IV.A.2, also clearly indicate that the costs for ongoing evaluations are applicable to certificated instructional personnel only. The activities listed in sections IV.A.1 and IV.A.2 clearly differentiate the review of employees' instructional techniques as strategies and the review of the results of the STAR testing as they relate to instructional techniques and strategies and adherence to curricular objectives as activities attributed to those employees who provide classroom instruction to students. Therefore, our conclusion to exclude on-going routine evaluations of non-instructional personnel claimed under components IV.A.1 and IV.A.2 from reimbursement is consistent with the intent of this program and the language of the parameters and guidelines.

#### Preschool teachers

The district disagrees with our determination that preschool teacher evaluations are not reimbursable because preschool teachers do not perform the requirements of an educational program mandated by state or federal law. The district states there is no stated basis to exclude preschool instructors.

The parameters and guidelines, section IV.A.1 allows reimbursement of evaluating and assessing the performance of certificated employees who "perform the requirements of educational programs mandated by state or federal law..." The same section further notes the following (Exhibit B):

For purposes of claiming reimbursement, eligible claimants must identify the state or federal law mandating the educational program being performed by the certificated instructional employees.

The district did not fulfill this requirement when filing its claims. During the audit fieldwork, we were able to research and identify state or federal law mandating the majority of educational programs and subjects for the teacher evaluations claimed. However, the district did not identify specific state or federal law supporting that preschool instruction was a mandated educational program.

The district stated in its response to the draft audit report that federal law requires preschool instruction for special education pupils (Exhibit D). However, the district claims did not include any special education preschool teacher evaluations and we did not exclude any from reimbursement. The issue remained that preschool teachers claimed by the district did not appear to have worked in the program that was mandated by state or federal law.

The parameters and guidelines require the claimant districts to identify which state or federal law mandates the education programs for the teacher evaluations being claimed. The district did not identify any law that mandates the preschool program, either when filing its claims, or during other subsequent times it responded to the audit report or filed this incorrect reduction claim.

#### Other excluded evaluations

The district concurred with the following categories of unallowable evaluations noted during the audit:

- Duplicate teacher evaluations claimed multiple times in one school year
- Permanent biannual teacher evaluations claimed every year rather than every other year

 Permanent five-year teacher evaluations claimed multiple times in a five-year period rather than once every five years

The district concurred that the evaluations described above were excluded in accordance with the criteria outlined in the program's parameters and guidelines.

#### IV. CONCLUSION

The SCO audited the Carlsbad Unified School District's claims for costs of the legislatively mandated Stull Act Program (Chapter 498, Statutes of 1983; and Chapter 4, Statutes of 1999) for the period of July 1, 2005, through June 30, 2009. The district claimed \$512,761 for the mandated program. Our audit found that \$238,660 is allowable and \$274,101 is unallowable. The costs are unallowable primarily because the district claimed reimbursement for activities not reimbursable under the mandated program.

The Commission should find that: (1) the SCO correctly reduced the district's FY 2005-06 claim by \$45,637; (2) the SCO correctly reduced the district's FY 2006-07 claim by \$124,851; (3) the SCO correctly reduced the district's FY 2007-08 claim by \$60,859, and (4) the SCO correctly reduced the district's FY 2008-09 claim by \$42,754.

#### V. CERTIFICATION

I hereby certify by my signature below that the statements made in this document are true and correct of my own knowledge, or, as to all other matters, I believe them to be true and correct based upon information and belief.

Executed on October 2, 2015, at Sacramento, California, by:

/mm L. Spano, Chief

Mandated Cost Audits Bureau

Division of Audits

State Controller's Office

### Tab 3

## BEFORE THE COMMISSION ON STATE MANDATES STATE OF CALIFORNIA

#### IN RE TEST CLAIM ON:

Education Code Sections 44660-44665 (Former Ed. Code, §§ 13485-13490);

Statutes 1975, Chapter 1216; Statutes 1983, Chapter 498; Statutes 1986, Chapter 393; Statutes 1995, Chapter 392; Statutes 1999, Chapter 4;

Filed on July 7, 1999;

By Denair Unified School District, Claimant.

No. 98-TC-25

#### The Stull Act

STATEMENT OF DECISION PURSUANT TO GOVERNMENT CODE SECTION 17500 ET SEQ.; CALIFORNIA CODE OF REGULATIONS, TITLE 2, DIVISION 2, CHAPTER 2.5, ARTICLE 7

(Adopted on May 27, 2004)

#### STATEMENT OF DECISION

The attached Statement of Decision of the Commission on State Mandates is hereby adopted in the above-entitled matter.

PAULA HIGASHI, Executive Director

Date

6-1-2004

### BEFORE THE COMMISSION ON STATE MANDATES STATE OF CALIFORNIA

#### IN RE TEST CLAIM ON:

Education Code Sections 44660-44665 (Former Ed. Code, §§ 13485-13490);

Statutes 1975, Chapter 1216; Statutes 1983, Chapter 498; Statutes 1986, Chapter 393; Statutes 1995, Chapter 392; Statutes 1999, Chapter 4;

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#### The Stull Act

STATEMENT OF DECISION PURSUANT TO GOVERNMENT CODE SECTION 17500 ET SEQ.; CALIFORNIA CODE OF REGULATIONS, TITLE 2, DIVISION 2, CHAPTER 2.5, ARTICLE 7

(Adopted on May 27, 2004).

#### PROPOSED STATEMENT OF DECISION

The Commission on State Mandates (Commission) heard and decided this test claim during a regularly scheduled hearing on May 27, 2004. David E. Scribner appeared for the claimant, Denair Unified School District. Barbara Taylor appeared for the Department of Finance.

The law applicable to the Commission's determination of a reimbursable state-mandated program is article XIII B, section 6 of the California Constitution, Government Code section 17500 et seq., and related case law.

The Commission adopted the staff analysis at the hearing by a vote of 4 to 0.

#### **BACKGROUND**

This test claim addresses the Stull Act. The Stull Act was originally enacted in 1971 to establish a uniform system of evaluation and assessment of the performance of "certificated personnel" within each school district. (Former Ed. Code, §§ 13485-13490.)¹ The Stull Act required the governing board of each school district to develop and adopt specific guidelines to evaluate and assess certificated personnel², and to avail itself of the advice of certificated instructional personnel before developing and adopting the guidelines.³ The evaluation and assessment of the certificated personnel was required to be reduced to writing and a copy transmitted to the employee no later than sixty days before the end of the school year.⁴ The employee then had the right to initiate a written response to the evaluation, which became a permanent part of the

Statutes 1971, chapter 361.

² Former Education Code section 13487.

³ Former Education Code section 13486.

⁴ Former Education Code section 13488.

employee's personnel file.⁵ The school district was also required to hold a meeting with the employee to discuss the evaluation.⁶

Former Education Code section 13489 required that the evaluation and assessment be continuous. For probationary employees, the evaluation had to occur once each school year. For permanent employees, the evaluation was required every other year. Former section 13489 also required that the evaluation include recommendations, if necessary, for areas of improvement in the performance of the employee. If the employee was not performing his or her duties in a satisfactory manner according to the standards, the "employing authority" was required to notify the employee in writing, describe the unsatisfactory performance, and confer with the employee making specific recommendations as to areas of improvement and endeavor to assist in the improvement.

In 1976, the Legislature renumbered the provisions of the Stull Act. The Stull Act can now be found in Education Code sections 44660-44665.8

The test claim legislation, enacted between 1975 and 1999, amended the Stull Act. The claimant alleges that the amendments constitute a reimbursable state-mandated program within the meaning of article XIII B, section 6 of the California Constitution.

In addition, the claimant, a school district, alleges that compliance with the Stull Act is new as to county offices of education and, thus, counties are entitled to reimbursement for all activities under the Stull Act. 10

However, no county office of education has appeared in this action as a claimant, nor filed a declaration alleging mandated costs exceeding \$1000, as expressly required by Government Code section 17564 and section 1183 of the Commission's regulations.

Therefore, the test claim has not been perfected as to county offices of education. The findings in this analysis, therefore, are limited to school districts.

⁵ Ibid.

⁶ Ibid.

⁷ Former Education Code section 13490 defined "employing authority" as "the superintendent of the school district in which the employee is employed, or his designee, or in the case of a district which has no superintendent, a school principal or other person designated by the governing board."

⁸ Statutes 1976, chapter 1010.

⁹ In 1999, the Legislature added Education Code section 44661.5 to the Stull Act. (Stats. 1999, ch. 279.) Education Code section 44661.5 authorizes a school district to include objective standards from the National Board for Professional Teaching Standards or any objective standards from the California Standards for the Teaching Profession when developing evaluation and assessment guidelines. The claimant did not include Education Code section 44661.5 in this test claim.

¹⁰ Exhibit A (Test Claim, pages 7-9) to Item 9 of the May 27, 2004 Commission Hearing.

#### Claimant's Position

The claimant contends that the test claim legislation constitutes a reimbursable state-mandated program for the following "new" activities:

- Rewrite standards for employee assessment to reflect expected student "achievement" (as opposed to the prior requirement of expected student "progress") and to expand the standards to reflect expected student achievement at each "grade level." (Stats. 1975, ch. 1216.)
- Develop job responsibilities for certificated non-instructional personnel, including but not limited to, supervisory and administrative personnel. (Stats. 1975, ch. 1216.)
- Assess and evaluate non-instructional personnel. (Stats. 1975, ch. 1216; Stats. 1995, ch. 392.)
- Receive and review responses from certificated non-instructional personnel regarding the employee's evaluation. (Stats. 1986, ch. 393.)
- Conduct a meeting between the certificated non-instructional employee and the evaluator to discuss the evaluation and assessment. (Stats. 1986, ch. 393.)
- Conduct additional evaluations of certificated employees who receive an unsatisfactory evaluation. (Stats. 1983, ch. 498.)
- Review the results of a certificated instructional employee's participation in the Peer Assistance and Review Program for Teachers as part of the assessment and evaluation. (Stats. 1999, ch. 4.)
- Assess and evaluate the performance of certificated instructional personnel as it relates to the instructional techniques and strategies used and the employee's adherence to curricular objectives. (Stats. 1983, ch. 498.)
- Assess and evaluate certificated instructional personnel as it relates to the progress of pupils towards the state adopted academic content standards, if applicable, as measured by state adopted criterion referenced assessments. (Stats. 1999, ch. 4.)
- Assess and evaluate certificated personnel employed by county superintendents of education. (Stats. 1975, ch. 1216.)¹¹

#### Department of Finance's Position

The Department of Finance filed comments on March 6, 2001, contending that most of the activities requested by the claimant do not constitute reimbursable state-mandated activities. The Department of Finance states, however, that the following activities "may" be reimbursable:

• Assess and evaluate the performance of certificated instructional personnel as it relates to the progress of students toward the attainment of state academic standards, as measured by state-adopted assessments.

¹¹ Exhibit A (Test Claim) to Item 9 of the May 27, 2004 Commission Hearing.

- Modification of assessment and evaluation methods to determine whether instructional staff is adhering to the curricular objectives and instructional techniques and strategies associated with the updated state academic standards.
- Assess and evaluate permanent certificated staff that has received an unsatisfactory evaluation at least once each year, until the employee receives a satisfactory evaluation, or is separated from the school district.
- Implementation of the Stull Act by county offices of education.

#### Discussion

The courts have found that article XIII B, section 6 of the California Constitution¹³ recognizes the state constitutional restrictions on the powers of local government to tax and spend.¹⁴ "Its purpose is to preclude the state from shifting financial responsibility for carrying out governmental functions to local agencies, which are 'ill equipped' to assume increased financial responsibilities because of the taxing and spending limitations that articles XIII A and XIII B impose."¹⁵ A test claim statute or executive order may impose a reimbursable state-mandated program if it orders or commands a local agency or school district to engage in an activity or task.¹⁶ In addition, the required activity or task must be new, constituting a "new program," or it must create a "higher level of service" over the previously required level of service.¹⁷

¹² Exhibit B to Item 9 of the May 27, 2004 Commission Hearing.

¹³ Article XIII B, section 6 provides: "Whenever the Legislature or any state agency mandates a new program or higher level of service on any local government, the state shall provide a subvention of funds to reimburse such local government for the costs of such program or increased level of service, except that the Legislature may, but need not, provide such subvention of funds for the following mandates: (a) Legislative mandates requested by the local agency affected; (b) Legislation defining a new crime or changing an existing definition of a crime; or (c) Legislative mandates enacted prior to January 1, 1975, or executive orders or regulations initially implementing legislation enacted prior to January 1, 1975."

¹⁴ Department of Finance v. Commission on State Mandates (2003) 30 Cal.4th 727, 735.

¹⁵ County of San Diego v. State of California (1997) 15 Cal.4th 68, 81.

Long Beach Unified School Dist. v. State of California (1990) 225 Cal. App.3d 155, 174. In Department of Finance v. Commission on State Mandates, supra, 30 Cal. 4th at page 742, the court agreed that "activities undertaken at the option or discretion of a local government entity (that is, actions undertaken without any legal compulsion or threat of penalty for nonparticipation) do not trigger a state mandate and hence do not require reimbursement of funds - even if the local entity is obligated to incur costs as a result of its discretionary decision to participate in a particular program or practice." The court left open the question of whether non-legal compulsion could result in a reimbursable state mandate, such as in a case where failure to participate in a program results in severe penalties or "draconian" consequences. (Id., at p. 754.)

¹⁷ Lucia Mar Unified School District v. Honig (1988) 44 Cal.3d 830, 835-836.

The courts have defined a "program" subject to article XIII B, section 6, of the California Constitution, as one that carries out the governmental function of providing public services, or a law that imposes unique requirements on local agencies or school districts to implement a state policy, but does not apply generally to all residents and entities in the state. ¹⁸ To determine if the program is new or imposes a higher level of service, the test claim legislation must be compared with the legal requirements in effect immediately before the enactment of the test claim legislation. ¹⁹ Finally, the newly required activity or increased level of service must impose costs mandated by the state. ²⁰

The Commission is vested with exclusive authority to adjudicate disputes over the existence of state-mandated programs within the meaning of article XIII B, section 6.²¹ In making its decisions, the Commission must strictly construe article XIII B, section 6 and not apply it as an "equitable remedy to cure the perceived unfairness resulting from political decisions on funding priorities."²²

### Issue 1: Is the test claim legislation subject to article XIII B, section 6 of the California Constitution?

Certain statutes in the test claim legislation do not require school districts to perform activities and, thus, are not subject to article XIII B, section 6.

In order for a statute to be subject to article XIII B, section 6 of the California Constitution, the statutory language must require local agencies or school districts to perform an activity or task. If the statutory language does not mandate local agencies or school districts to perform a task, then compliance with the test claim statute is within the discretion of the local entity and a reimbursable state-mandated program does not exist.

Here, there are two test claim statutes, Education Code section 44664, subdivision (b) (as amended by Stats. 1983, ch, 498 and Stats. 1999, ch. 4) and Education Code section 44662, subdivision (d) (as amended by Stats. 1999, ch. 4) that do not require school districts to perform activities and, thus, are not subject to article XIII B, section 6 of the California Constitution.

Education Code section 44664, subdivision (b), as amended by Statutes 1983, chapter 498. In 1983, the Legislature amended Education Code section 44664 by adding subdivision (b). Subdivision (b) authorizes a school district to require a certificated employee that receives an

¹⁸ County of Los Angeles v. State of California (1987) 43 Cal.3d 46, 56; Lucia Mar, supra, 44 Cal.3d 830, 835.

¹⁹ Lucia Mar, supra, 44 Cal.3d 830, 835.

²⁰ County of Fresno v. State of California (1991) 53 Cal.3d 482, 487; County of Sonoma v. Commission on State Mandates (2000) 84 Cal.App.4th 1265, 1284; Government Code sections 17514 and 17556.

²¹ Kinlaw v. State of California (1991) 54 Cal.3d 326, 331-334; Government Code sections 17551, 17552.

²² City of San Jose v. State of California (1996) 45 Cal. App. 4th 1802, 1817; County of Sonoma, supra, 84 Cal. App. 4th 1265, 1280.

unsatisfactory evaluation to participate in a program to improve the employee's performance. Education Code section 44664, subdivision (b), stated the following:

Any evaluation performed pursuant to this article which contains an unsatisfactory rating of an employee's performance in the area of teaching methods or instruction *may* include the requirement that the certificated employee shall, as determined by the employing authority, participate in a program designed to improve appropriate areas of the employee's performance and to further pupil achievement and the instructional objectives of the employing authority. (Emphasis added.)

The plain language of the statute authorizes, but does not mandate, a school district to require its certificated employees to participate in a program designed to improve performance if the employee receives an unsatisfactory evaluation. Thus, the Commission finds that Education Code section 44664, subdivision (b), as amended by Statutes 1983, chapter 498, does not mandate school districts to perform an activity and, thus, it is not subject to article XIII B, section 6 of the California Constitution.

Education Code section 44662, subdivision (d), and Education Code section 44664, subdivision (b), as amended by Statutes 1999, chapter 4. In 1999, the Legislature amended Education Code section 44664, subdivision (b), by adding the following underlined sentence:

Any evaluation performed pursuant to this article which contains an unsatisfactory rating of an employee's performance in the area of teaching methods or instruction may include the requirement that the certificated employee shall, as determined by the employing authority, participate in a program designed to improve appropriate areas of the employee's performance and to further pupil achievement and the instructional objectives of the employing authority. If a district participates in the Peer Assistance and Review Program for Teachers established pursuant to Article 4.5 (commencing with Section 44500), any certificated employee who receives an unsatisfactory rating on an evaluation performed pursuant to this section shall participate in the Peer Assistance and Review Program for Teachers.

The 1999 test claim legislation also amended Education Code section 44662 by adding subdivision (d), which states:

Results of an employee's participation in the Peer Assistance and Review Program for Teachers established by Article 4.5 (commencing with Section 44500) shall be made available as part of the evaluation conducted pursuant to this section.

The claimant requests reimbursement to "receive and review, for purposes of a certificated employee's assessment and evaluation, if applicable, the results of an employee's participation in the Peer Assistance and Review Program for Teachers established by Article 4.5 (commencing with section 44500.)"²³

²³ Exhibit A (Test Claim, page 7) to Item 9 of the May 27, 2004 Commission Hearing.

The Department of Finance contends that reviewing the results of the Peer Assistance and Review Program, as part of the Stull Act evaluation of the employee's performance, is not a reimbursable state-mandated activity because participation in the Peer Assistance and Review Program is voluntary.²⁴

In response to the Department of Finance, the claimant states the following:

The legislative intent behind the amendments to the Stull Act was to ensure that school districts adopt objective, uniform evaluation and assessment guidelines that effectively assess certificated employee performance. To meet this desired goal, school districts that participate in the Peer Assistance and Review Program must include an employee's results of participation in the employee's evaluation. If this information was not considered by the district, inconsistent, incomplete, and inaccurate evaluations and assessments would occur – a result contrary to the Legislature's stated intent. Therefore, the claimant contends that the activities associated with the receipt and review of an employee's participation in the Peer Assistance and Review Program impose reimbursable state-mandated activities upon school districts.²⁵

For the reasons described below, the Commission finds that the receipt and review of the results of an employee's participation in the Peer Assistance and Review Program is not a statemandated activity and, therefore, the 1999 amendments to Education Code sections 44662 and 44664 are not subject to article XIII B, section 6 of the California Constitution.

In Department of Finance v. Commission on State Mandates²⁶, the Supreme Court reviewed test claim legislation that required school site councils to post a notice and an agenda of their meetings. The court determined that school districts were not legally compelled to establish eight of the nine school site councils and, thus, school districts were not mandated by the state to comply with the notice and agenda requirements for these school site councils.²⁷ The court reviewed the ballot materials for article XIII B, which provided that "a state mandate comprises something that a local government entity is required or forced to do."²⁸ The ballot summary by the Legislative Analyst further defined "state mandates" as "requirements imposed on local governments by legislation or executive orders."²⁹

The court also reviewed and affirmed the holding of the City of Merced case.^{30, 31} The court stated the following:

²⁴ Exhibit B to Item 9 of the May 27, 2004 Commission Hearing.

²⁵ Exhibit C (Claimant Rebuttal, page 7) to Item 9 of the May 27, 2004 Commission Hearing.

²⁶ Department of Finance, supra, 20 Cal.4th 727.

²⁷ *Id.* at page 731.

²⁸ *Id.* at page 737.

²⁹ Ibid.

³⁰ *Id.* at page 743.

³¹ City of Merced v. State of California (1984) 153 Cal.App.3d 777.

In City of Merced, the city was under no legal compulsion to resort to eminent domain-but when it elected to employ that means of acquiring property, its obligation to compensate for lost business goodwill was not a reimbursable state mandate, because the city was not required to employ eminent domain in the first place. Here as well, if a school district elects to participate in or continue participation in any underlying voluntary education-related funded program, the district's obligation to comply with the notice and agenda requirements related to that program does not constitute a reimbursable state mandate. (Emphasis in original.)³²

Thus, the Supreme Court held as follows:

[W]e reject claimants' assertion that they have been legally compelled to incur notice and agenda costs, and hence are entitled to reimbursement from the state, based merely upon the circumstance that notice and agenda provisions are mandatory elements of education-related programs in which claimants have participated, without regard to whether claimant's participation in the underlying program is voluntary or compelled. [Emphasis added.]³³

The Supreme Court left undecided whether a reimbursable state mandate "might be found in circumstances short of legal compulsion—for example, if the state were to impose a substantial penalty (independent of the program funds at issue) upon any local entity that declined to participate in a given program."³⁴

The decision of the California Supreme Court in *Department of Finance* is relevant and its reasoning applies in this case. The Supreme Court explained that "the proper focus under a legal compulsion inquiry is upon the nature of the claimants' participation in the underlying programs themselves." Thus, based on the Supreme Court's decision, the Commission is required to determine if the underlying program (in this case, participation in the Peer Assistance and Review Program) is a voluntary decision at the local level or is legally compelled by the state.

The Peer Assistance and Review Program and the amendment to the Stull Act to reflect the Peer Assistance and Review Program were sponsored by Governor Davis and were enacted by the Legislature during the 1999 special legislative session on education. As expressly provided in the legislation, the intent of the Legislature, in part, was to coordinate the Peer Assistance and Review Program with the evaluations of certificated employees under the Stull Act. Section 1 of the 1999 test claim legislation states the following:

It is the intent of the Legislature to establish a teacher peer assistance and review system as a critical feedback mechanism that allows exemplary teachers to assist

³² Ibid

³³ *Id.* at page 731.

³⁴ Ibid.

³⁵ *Id.* at page 743.

veteran teachers in need of development in subject matter knowledge or teaching strategies, or both.

It is further the intent of the Legislature that a school district that operates a program pursuant to Article 4.5 (commencing with Section 44500) of Chapter 3 of Part 25 of the Education Code coordinate its employment policies and procedures for that program with its activities for professional staff development, the Beginning Teacher Support and Assessment Program, and the biennial evaluations of certificated employees required pursuant to Section 44664 [of the Stull Act].

The plain language of Education Code section 44500, subdivision (a), authorizes, but does not require, school districts to participate in the Peer Assistance and Review Program. That section states in pertinent part that "[t]he governing board of a school district and the exclusive representative of the certificated employees in the school district may develop and implement a program authorized by this article that meets local conditions and conforms with the principles set forth in subdivision (b)." (Emphasis added.) If a school district implements the program, the program must assist a teacher to improve his or her teaching skills and knowledge, and provide that the final evaluation of a teacher's participation in the program be made available for placement in the personnel file of the teacher receiving assistance. (Ed. Code, § 44500, subd. (b).) Furthermore, school districts that participate in the Peer Assistance and Review Program receive state funding pursuant to Education Code sections 44505 and 44506.

Therefore, the Commission finds that school districts are not legally compelled to participate in the Peer Assistance and Review Program and, thus, not legally compelled to receive and review the results of the program as part of the Stull Act evaluation.

The Commission further finds that school districts are not practically compelled to participate in the Peer Assistance and Review Program and review the results as part of the Stull Act evaluation. In Department of Finance, the California Supreme Court, when considering the practical compulsion argument raised by the school districts, reviewed its earlier decision in City of Sacramento v. State of California (1990) 50 Cal.3d 51.36 The City of Sacramento case involved test claim legislation that extended mandatory coverage under the state's unemployment insurance law to include state and local governments and nonprofit corporations. The state legislation was enacted to conform to a 1976 amendment to the Federal Unemployment Tax Act, which required for the first time that a "certified" state plan include unemployment coverage of employees of public agencies. States that did not comply with the federal amendment faced a loss of a federal tax credit and an administrative subsidy.³⁷ The local agencies, knowing that federally mandated costs are not eligible for state subvention, argued against a federal mandate. The local agencies contended that article XIII B, section 9 requires clear legal compulsion not present in the Federal Unemployment Tax Act.³⁸ The state, on the other hand, contended that California's failure to comply with the federal "carrot and stick" scheme was so substantial that the state had no realistic "discretion" to refuse. Thus, the state

³⁶ Department of Finance, supra, 30 Cal.4th at pages 749-751.

³⁷ City of Sacramento, supra, 50 Cal.3d at pages 57-58.

³⁸ *Id.* at page 71.

contended that the test claim statute merely implemented a federal mandate and that article XIII B, section 6 does not require strict legal compulsion to apply.³⁹

The Supreme Court in City of Sacramento concluded that although local agencies were not strictly compelled to comply with the test claim legislation, the legislation constituted a federal mandate. The Supreme Court concluded that because the financial consequences to the state and its residents for failing to participate in the federal plan were so onerous and punitive, and the consequences amounted to "certain and severe federal penalties" including "double taxation" and other "draconian" measures, the state was mandated by federal law to participate in the plan.⁴⁰

The Supreme Court applied the same analysis in the *Department of Finance* case and found that the practical compulsion finding for a state mandate requires a showing of "certain and severe penalties" such as "double taxation" and other "draconian" consequences. The Court stated the following:

Even assuming, for purposes of analysis only, that our construction of the term "federal mandate" in *City of Sacramento* [citation omitted], applies equally in the context of article XIII B, section 6, for reasons set below we conclude that, contrary to the situation we described in that case, claimants here have not faced "certain and severe ... penalties" such as "double ... taxation" and other "draconian" consequences . . .⁴¹

Although there are statutory consequences for not participating in the Peer Assistance and Review Program, the Commission finds, as explained below, that the consequences do not constitute the type of draconian penalties described in the *Department of Finance* case.

Pursuant to Education Code section 44504, subdivision (b), school districts that do not participate in the Peer Assistance and Review Program are not eligible to receive state funding for specified programs. Education Code section 44504, subdivision (b), states the following:

A school district that does not elect to participate in the program authorized under this article by July 1, 2001, is not eligible for any apportionment, allocation, or other funding from an appropriation for the program authorized pursuant to this article or for any apportionments, allocations, or other funding from funding for local assistance appropriated pursuant to the Budget Act Item 6110-231-0001, funding appropriated for the Administrator Training and Evaluation Program set forth in Article 3 (commencing with Section 44681) of Chapter 3.1 of Part 25, from an appropriation for the Instructional Time and Staff Development Reform Program as set forth in Article 7.5 (commencing with Section 44579) of Chapter 3, or from an appropriation for school development plans as set forth in Article 1 (commencing with Section 44670.1) of Chapter 3.1 and the Superintendent of Public Instruction shall not apportion, allocate, or otherwise provide any funds to the district pursuant to those programs.

³⁹ Ibid.

⁴⁰ *Id.* at pages 73-76.

⁴¹ Department of Finance, supra, 30 Cal.4th at page 751.

The funding appropriated under the programs specified in Education Code section 44504, subdivision (b), are not state-mandated programs. Most are categorical programs undertaken at the discretion of the school district in order to receive grant funds. For example, the funding appropriated pursuant to the Budget Act Item 6110-231-0001 is local assistance funding to school districts "for the purpose of the Proposition 98 educational programs specified in subdivision (b) of Section 12.40 of this act." (Stats. 1999, ch. 50, State Budget Act.) The education programs specified in subdivision (b) of Section 12.40 of the 1999 State Budget Act include the Tenth Grade Counseling Program, the Reader Service for Blind Teacher Program, and the Home to School Transportation Program. (A full list of the educational programs identified in section 12.40 of the 1999 State Budget Act is provided in the footnote below.)⁴²

The same is true for the other programs identified in Education Code section 44504, subdivision (b), all of which are voluntary: i.e., the Administrator Training and Evaluation Program, the Instructional Time and Staff Development Reform Program, and the School Development Plans Program.

Accordingly, the Commission finds that the 1999 amendment to Education Code sections 44662, subdivision (d), and 44664, subdivision (b), does not impose a mandate on school districts to receive and review the results of the Peer Assistance and Review Program as part of the Stull Act

⁴² Section 12.40 of the 1999 State Budget Act identifies the following programs: Item 6110-108-0001 - Tenth Grade Counseling (Ed. Code, § 48431.7); Item 6110-110-0001 - Reader Service for Blind Teachers (Ed. Code, §§ 45371, 44925); Item 6110-111-0001 - Home to School Transportation and Small District Transportation (Ed. Code, § 41850, 42290); Item 6110-116-0001 - School Improvement Program (Ed. Code, § 52000 et seq.); Item 6110-118-0001 - State Vocational Education (in lieu of funds otherwise appropriated pursuant to Business and Professions Code section 19632); Item 6110-119-0001 - Educational Services for Foster Youth (Ed. Code, § 42920 et seq.); Item 6110-120-0001 – Pupil Dropout Prevention Programs (Ed. Code, §§ 52890, 52900, 54720, 58550); Item 6110-122-0001 – Specialized Secondary Programs (Ed. Code, § 58800 et seq.); Item 6110-124-0001 – Gifted and Talented Pupil Program (Ed. Code, § 52200 et seq.); Item 6110-126-0001 – Miller-Unruh Basic Reading Act of 1965 (Ed. Code, § 54100 et seq.); Item 6110-127-0001 – Opportunity Classes and Programs (Ed. Code, § 48643 et seq.); Item 6110-128-0001 – Economic Impact Aid (Ed. Code, §§ 54020, 54031, 54033, 54040); Item 6110-131-0001 – American Indian Early Childhood Education Program (Ed. Code, § 52060 et seq.); Item 6110-146-0001 – Demonstration Programs in Intensive Instruction (Ed. Code, § 58600 et seq.); Item 6110-151-0001 – California Indian Education Centers (Ed. Code, § 33380); Item 6110-163-0001 – The Early Intervention for School Success Program (Ed. Code, § 54685 et seq.); Item 6110-167-0001 - Agricultural Vocational Education Incentive Program (Ed. Code, § 52460 et seq.); Item 6110-180-0001 grant money pursuant to the federal Technology Literacy Challenge Grant Program; Item 6110-181-0001 – Educational Technology Programs (Ed. Code, § 51870 et seq.); Item 6110-193-0001 - Administrator Training and Evaluation Program, School Development Plans and Resource Consortia, Bilingual Teacher Training Program; Item 6110-197-0001 – Instructional Support-Improving School Effectiveness – Intersegmental Programs; Item 6110-203-0001 – Child Nutrition Programs (Ed. Code, §§ 41311, 49536, 49501, 49550, 49552, 49559); Item 6110-204-0001 - 7th and 8th Grad Math Academies; and Item 6110-209-0001 - Teacher Dismissal Apportionments (Ed. Code, § 44944).

evaluation and, thus, these sections are not subject to article XIII B, section 6 of the California Constitution.

The remaining requirements imposed by the test claim legislation constitute a state-mandated program only for those certificated employees that perform the duties mandated by state and federal law.

The remaining test claim legislation requires school districts, in their evaluation of certificated personnel, to perform the following activities:

- assess and evaluate the performance of non-instructional certificated personnel (former Ed. Code, §§ 13485, 13487, as amended by Stats. 1975, ch. 1216; Ed. Code, § 44663, as amended by Stats. 1986, ch. 393);
- establish standards of expected student achievement at each grade level in each area of study to be included in a district's evaluation and assessment guidelines (former Ed. Code, § 13487, as repealed and reenacted by Stats. 1975, ch, 1216);
- evaluate and assess the performance of instructional certificated employees as it reasonably relates to the instructional techniques and strategies used by certificated employees, the certificated employee's adherence to curricular objectives, and the progress of pupils towards the state adopted academic content standards (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498 and Stats. 1999, ch. 4); and
- assess and evaluate certificated personnel that receive an unsatisfactory evaluation once each year until the employee achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498).

Pursuant to the Supreme Court's decision in the *Department of Finance* case, the Commission finds that the evaluation and assessment activities required by the test claim legislation constitute state-mandated activities only for those certificated employees that perform the duties mandated by state or federal law. The activities associated with evaluating and assessing certificated personnel employed in local, discretionary educational programs do not constitute statemandated activities and, thus, are not subject to article XIII B, section 6 of the California Constitution.

In Department of Finance, supra, the Court found, on page 731 of the decision, that:

[W]e reject claimants' assertion that they have been legally compelled to incur notice and agenda costs, and hence are entitled to reimbursement from the state, based merely upon the circumstance that notice and agenda provisions are mandatory elements of education-related program in which claimants have participated, without regard to whether claimant's participation in the underlying program is voluntary or compelled. [Emphasis added.]

In the present case, the California Constitution gives the Legislature plenary authority over education by requiring the Legislature to encourage by all suitable means the promotion of education and to provide for a system of common schools.⁴³ A system of common schools

⁴³ California Constitution, article IX, sections 1, 5; *Hayes v. Commission on State Mandates* (1992) 11 Cal. App.4th 1564, 1579, fn. 5.

means one system, which prescribes the courses of study and educational progression from grade to grade. ⁴⁴ Schools are required to meet the minimum standards and guidelines regarding course instruction and educational progression established by the Legislature. ⁴⁵

Given this background, the Legislature has historically mandated specified educational programs that school districts are required to follow. For example, Education Code section 48200 provides that each person between the ages of six and 18 years is subject to compulsory full-time education. School districts are required to adopt a course of study for grades 1 to 6 that shall include English, Mathematics, Social Sciences, Science, Visual and Performing Arts, Health, and Physical Education.⁴⁶ School districts are required to offer the following courses for grades 7 to 12: English, Social Sciences, Foreign Language, Physical Education, Science, Mathematics, Visual and Performing Arts, Career Technical Education; and Driver Education. 47 Education Code section 51225.3 describes the state-mandated courses of instruction required for high school graduation. In addition, in the appropriate elementary and secondary grade levels, the required course of study shall include instruction in personal and public safety and accident prevention (Ed. Code, § 51202), instruction about the nature and effects of alcohol, narcotics. and restricted dangerous drugs (Ed. Code, § 51203), and, in grades 7 and 8, instruction on parenting skills and education (Ed. Code, 51220.5). Finally, Education Code section 44805 states that "every teacher in the public schools shall enforce the course of study... prescribed for schools."

In addition, federal law requires school districts to provide a free and appropriate education to all handicapped children.⁴⁸

Thus, school districts are required to employ certificated personnel to fulfill the requirements of the state and federal mandated educational programs. Accordingly, pursuant to the *Department of Finance* case, school districts are mandated by the state to perform the test claim requirements to evaluate and assess the certificated personnel performing the mandated functions.

Moreover, the Commission finds that the test claim requirements to evaluate and assess the certificated personnel performing mandated functions constitutes a program subject to article XIII B, section 6 of the California Constitution. The California Supreme Court, in the case of County of Los Angeles v. State of California⁴⁹, defined the word "program" within the meaning of article XIII B, section 6 as a program that carries out the governmental function of providing a

⁴⁴ Wilson v. State Board of Education (1999) 75 Cal.App.4th 1123, 1135-1136. In Wilson, the court determined that charter schools fall within the system of common schools because their educational programs are required to meet the same state standards, including minimum duration of instruction applicable to all public schools, measurement of student progress by the same assessments required of all public school students, and students are taught by teachers meeting the same minimum requirements as all other public school teachers. (Id. at p. 1138.)

⁴⁵ Burton v. Pasadena City Board of Education (1977) 71 Cal.App.3d 52, 58.

⁴⁶ Education Code section 51210.

⁴⁷ Education Code section 51220.

⁴⁸ Hayes, supra, 11 Cal.App.4th at page 1592.

⁴⁹ County of Los Angeles, supra, 43 Cal.3d at page 56.

service to the public, or laws which, to implement a state policy, impose unique requirements on local governments and do not apply generally to all residents and entities in the state. Only one of these findings is necessary to trigger the applicability of article XIII B, section 6.50

Legislative intent of the test claim legislation is provided in Education Code section 44660 as follows:

It is the intent of the Legislature that governing boards establish a uniform system of evaluation and assessment of the performance of all certificated personnel within each school district of the state, including schools conducted or maintained by county superintendents of education. The system shall involve the development and adoption by each school district of objective evaluation and assessment guidelines, which may, at the discretion of the governing board, be uniform throughout the district, or for compelling reasons, be individually developed for territories or schools within the district, provided that all certificated personnel of the district shall be subject to a system of evaluation and assessment adopted pursuant to this article.⁵¹

The Commission finds that objectively evaluating the performance of certificated personnel performing mandated functions within a school district carries out the governmental function of providing a service to the public. Public education is a governmental function within the meaning of article XIII B, section 6. The California Supreme Court in *Lucia Mar* stated that "the contributions called for [in the test claim legislation] are used to fund a 'program' . . . for the education of handicapped children is clearly a governmental function providing a service to the public." Additionally, the court in the *Long Beach Unified School District* case held that "although numerous private schools exist, education in our society is considered to be a peculiarly governmental function." In addition, the test claim legislation imposes unique requirements on school districts.

However, the activities associated with evaluating and assessing certificated personnel employed in local, discretionary educational programs do not constitute state-mandated activities and, thus, are not subject to article XIII B, section 6 of the California Constitution. Pursuant to existing law, school districts are encouraged to develop their own local programs that best fit the needs and interests of the pupils. Unless the Legislature expressly imposes statutory requirements on school districts, school districts have discretionary control with their educational programs.⁵⁴

⁵⁰ Carmel Valley Fire Protection Dist., supra, 190 Cal.App.3d at page 537.

⁵¹ As originally enacted, former Education Code section 13485 stated the legislative intent as follows: "It is the intent of the Legislature to establish a uniform system of evaluation and assessment of the performance of certificated personnel within each school district of the state. The system shall involve the development and adoption by each school district of objective evaluation and assessment guidelines."

⁵² Lucia Mar, supra, 44 Cal.3d at page 835.

⁵³ Long Beach Unified School District, supra, 225 Cal.App.3d at page 172.

⁵⁴ California Constitution, article IX, section 14; Education Code sections 35160, 35160.1, 51002.

For example, the Supreme Court in the *Department of Finance* case found that eight of the nine educational programs were voluntary and not mandated by the state. These include the following programs: School Improvement Program (Ed. Code, § 52010 et seq.); American Indian Early Childhood Education Program (Ed. Code, § 52060 et seq.); School-Based Coordinated Categorical Program (Ed. Code, § 52850 et seq.); Compensatory Education Programs (Ed. Code, § 54420 et seq.); Migrant Education Program (Ed. Code, § 54440 et seq.); Motivation and Maintenance Program (Ed. Code, § 54720 et seq.); Parental Involvement Program (Ed. Code, § 11500 et seq.); and Federal Indian Education Program (25 U.S.C, § 2604).⁵⁵

The Commission finds that school districts are free to discontinue their participation in these underlying voluntary programs and free to discontinue employing certificated personnel funded by these programs. Accordingly, the test claim requirements to evaluate and assess certificated personnel funded or employed in local discretionary programs are not mandated by the state and not subject to article XIII B, section 6 of the California Constitution.⁵⁶

Since the parties did not file comments in response to the request for additional briefing on this issue, the determination of the certificated employees performing mandated functions for which schools districts are eligible to receive reimbursement will be addressed during the parameters and guidelines phase.

## Issue 2: Does the test claim legislation impose a new program or higher level of service within the meaning of article XIII B, section 6 of the California Constitution?

The California Supreme Court and the courts of appeal have held that article XIII B, section 6 was not intended to entitle local agencies and school districts for all costs resulting from legislative enactments, but only those costs mandated by a new program or higher level of service imposed on them by the state. ⁵⁷ Generally, to determine if the program is new or imposes a higher level of service, the analysis must compare the test claim legislation with the legal requirements in effect immediately before the enactment of the test claim legislation. ⁵⁸

As indicated above, the Stull Act was enacted in 1971. The test claim legislation, enacted from 1975 to 1999, amended the Stull Act. The issue is whether the amendments constitute a new program or higher level of service within the meaning of article XIII B, section 6 of the California Constitution.

⁵⁵ Department of Finance, supra, 30 Cal.4th at page 745.

⁵⁶ The court did not conclude whether school districts were legally compelled to participate in the Bilingual-Bicultural Education program (Ed. Code, § 52160 et seq.) since the case was denied on other grounds. (*Department of Finance, supra*, 30 Cal.4th at p. 746-747.)

⁵⁷ Lucia Mar Unified School Dist., supra, 44 Cal.3d at page 834; City of San Jose v. State of California (1996) 45 Cal.App.4th 1802, 1816.

⁵⁸ Lucia Mar Unified School Dist., supra, 44 Cal.3d at page 835.

Develop job responsibilities for certificated non-instructional personnel, and assess and evaluate the performance of certificated non-instructional personnel (Former Ed. Code, §§ 13485, 13487, as amended by Stats. 1975, ch. 1216; Ed. Code, § 44663, as amended by Stats. 1986, ch. 393).

The claimant is requesting reimbursement for the following activities relating to certificated non-instructional employees:

- Establish and define job responsibilities for certificated non-instructional personnel, including, but not limited to, supervisory and administrative personnel.
- Evaluate and assess the performance of certificated non-instructional personnel as it reasonably relates to the fulfillment of the established job responsibilities.
- Prepare and draft a written evaluation of the certificated non-instructional employee. The evaluation shall include recommendations, if necessary, as to areas of improvement.
- Receive and review from a certificated non-instructional employee written responses regarding the evaluation.
- Prepare and hold a meeting between the certificated non-instructional employee and the evaluator to discuss the evaluation and assessment.⁵⁹

As originally enacted in 1971, the Stull Act stated in former Education Code section 13485 the following:

It is the intent of the Legislature to establish a uniform system of evaluation and assessment of the performance of certificated personnel within each school district of the state. The system shall involve the development and adoption by each school district of objective evaluation and assessment guidelines.

Former Education Code section 13486 stated the following:

In the development and adoption of these guidelines and procedures, the governing board shall avail itself of the advice of the certificated instructional personnel in the district's organization of certificated personnel.

Former Education Code section 13487 required school districts to develop and adopt specific evaluation and assessment guidelines for certificated personnel. Former section 13487 stated the following:

The governing board of each school district shall develop and adopt specific evaluation and assessment guidelines which shall include but shall not necessarily be limited in content to the following elements:

- (a) The establishment of standards of expected student progress in each area of study and of techniques for the assessment of that progress.
- (b) Assessment of certificated personnel as it relates to the established standards.
- (c) Assessment of other duties normally required to be performed by certificated employees as an adjunct to their regular assignments.

⁵⁹ Exhibit A (Test Claim, page 6) to Item 9 of the May 27, 2004 Commission Hearing.

(d) The establishment of procedures and techniques for ascertaining that the certificated employee is maintaining proper control and is preserving a suitable learning environment.

Former Education Code section 13488 required that the evaluation and assessment be reduced to writing, that an opportunity to respond be given to the certificated employee, and that a meeting be held between the certificated employee and the evaluator to discuss the evaluation. Former section 13488 stated the following:

Evaluation and assessment made pursuant to this article shall be reduced to writing and a copy thereof shall be transmitted to the certificated employee not later than 60 days before the end of each school year in which the evaluation takes place. The certificated employee shall have the right to initiate a written reaction or response to the evaluation. Such response shall become a permanent attachment to the employee's personnel file. Before the end of the school year, a meeting shall be held between the certificated personnel and the evaluator to discuss the evaluation.

And, former Education Code section 13489 required that the evaluation and assessment be performed on a continuing basis, and that the evaluation include necessary recommendations as to areas of improvement. Former Education Code section 13489, as enacted in 1971, stated the following:

Evaluation and assessment of the performance of each certificated employee shall be made on a continuing basis, at least once each school year for probationary personnel, and at least every other year for personnel with permanent status. The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. In the event an employee is not performing his duties in a satisfactory manner according to the standards prescribed by the governing board, the employing authority shall notify the employee in writing of such fact and describe such unsatisfactory performance. The employing authority shall thereafter confer with the employee making specific recommendations as to areas of improvement in the employee's performance and endeavor to assist him in such performance.

In addition, section 42 of the 1971 statute provided a specific exemption for certificated employees of community colleges if a related bill was enacted. Section 42 stated the following:

Article 5 (commencing with Section 13401) and Article 5.5 (commencing with Section 13485) of Chapter 2 of Division 10 of the Education Code shall not apply to certificated employees in community colleges if Senate Bill No. 696 or Assembly Bill No. 3032 is enacted at the 1971 Regular Session of the Legislature.

According to the history, Senate Bill 696 was enacted as Statutes 1971, chapter 1654. Thus, certificated employees of community colleges were not required to comply with the Stull Act.

In 1972, former Education Code section 13485 was amended to specifically exclude from the requirements of the Stull Act certificated personnel employed on an hourly basis in adult education classes.⁶⁰

In 1973, former Education Code section 13489 was amended to exclude hourly and temporary certificated employees and substitute teachers, at the discretion of the governing board, from the requirement to evaluate and assess on a continuing basis.⁶¹

Thus, under prior law, school districts were required to perform the following activities as they related to "certificated personnel:"

- Develop and adopt specific evaluation and assessment guidelines for the performance of "certificated personnel."
- Evaluate and assess "certificated personnel" as it relates to the established standards.
- Prepare and draft a written evaluation of the "certificated employee." The evaluation shall include recommendations, if necessary, as to areas of improvement.
- Receive and review from a "certificated employee" written responses regarding the evaluation.
- Prepare and hold a meeting between the "certificated employee" and the evaluator to discuss the evaluation and assessment.

The test claim legislation, in 1975 (Stats. 1975, ch. 1216), amended the Stull Act by adding language relating to certificated "non-instructional" employees. As amended, former Education Code section 13485 stated in relevant part the following (with the amended language underlined):

It is the intent of the Legislature that governing boards establish a uniform system of evaluation and assessment of the performance of <u>all</u> certificated personnel within each school district of the state....

Former Education Code section 13487 was also repealed and reenacted by Statutes 1975, chapter 1216, as follows (amendments relevant to this issue are underlined):

- (a) The governing board of each school district shall establish standards of expected student achievement at each grade level in each area of study.
- (b) The governing board of each school district shall evaluate and assess certificated employee competency as it reasonably relates to (1) the progress of students toward the established standards, (2) the performance of those noninstructional duties and responsibilities, including supervisory and advisory duties, as may be prescribed by the board, and (3) the establishment and maintenance of a suitable learning environment within the scope of the employee's responsibilities.

⁶⁰ Statutes 1972, chapter 535.

⁶¹ Statutes 1972, chapter 1973.

(c) The governing board of each school district shall establish and define job responsibilities for those certificated noninstructional personnel, including, but not limited to, supervisory and administrative personnel, whose responsibilities cannot be evaluated appropriately under the provisions of subdivision (b), and shall evaluate and assess the competency of such noninstructional employees as it reasonably relates to the fulfillment of those responsibilities. ...

The 1975 test claim legislation did not amend the requirements in former Education Code sections 13488 or 13489 to prepare written evaluations of certificated employees, receive responses to those evaluations, and conduct a meeting with the certificated employee to discuss the evaluation.

Additionally, in 1986, the test claim legislation (Stats. 1986, ch. 393) amended Education Code section 44663 (which derived from former Ed. Code, § 13488) by adding subdivision (b) to provide that the evaluation and assessment of certificated non-instructional employees shall be reduced to writing before June 30 of the year that the evaluation is made, that an opportunity to respond be given to the certificated non-instructional employee, and that a meeting be held between the certificated non-instructional employee and the evaluator to discuss the evaluation before July 30. Education Code section 44663, subdivision (b), as added by the test claim legislation, states the following:

In the case of a certificated noninstructional employee, who is employed on a 12-month basis, the evaluation and assessment made pursuant to this article shall be reduced to writing and a copy thereof shall be transmitted to the certificated employee no later than June 30 of the year in which the evaluation and assessment is made. A certificated noninstructional employee, who is employed on a 12-month basis shall have the right to initiate a written reaction or response to the evaluation. This response shall become a permanent attachment to the employee's personnel file. Before July 30 of the year in which the evaluation and assessment take place, a meeting shall be held between the certificated employee and the evaluator to discuss the evaluation and assessment.

The claimant contends that the Stull Act, as originally enacted in 1971, required the assessment and evaluation of teachers, or certificated instructional employees, only. The claimant argues that when the Stull Act was amended in 1975 and 1986, it added the requirement for schools districts to develop job responsibilities to assess and evaluate the performance of non-instructional personnel. The claimant contends that under the rules of statutory construction, an amendment indicates the legislative intent to change the law. The claimant contends that this amendment imposed additional activities on school districts to develop job responsibilities and evaluate certificated non-instructional employees, which constitute a higher level of service. 62

The Department of Finance argues that school districts have always had the requirement to assess and evaluate non-instructional personnel because the original legislation enacted in 1971 refers to all certificated personnel. The Department of Finance contends that the subsequent

⁶² Exhibit C to Item 9 of the May 27, 2004 Commission Hearing.

amendments that specifically list certificated non-instructional personnel, were clarifying edits and not new requirements.⁶³

The Stull Act was an existing program when the test claim legislation was enacted. Thus, the issue is whether the 1975 and 1986 amendments to the Stull Act mandated an increased, or higher level of service to develop job responsibilities and to evaluate and assess certificated non-instructional employees. In 1987, the California Supreme Court in *County of Los Angeles v. State of California* expressly stated that the term "higher level of service" must be read in conjunction with the phrase "new program." Both are directed at *state-mandated increases in the services* provided by local agencies.⁶⁴

In 1990, the Second District Court of Appeal decided the Long Beach Unified School District case, which challenged a test claim filed with the Board of Control on executive orders issued by the Department of Education to alleviate racial and ethnic segregation in schools. The court determined that the executive orders did not constitute a "new program" since schools had an existing constitutional obligation to alleviate racial segregation. However, the court found that the executive orders constituted a "higher level of service" because the requirements imposed by the state went beyond constitutional and case law requirements. The court stated in relevant part the following:

The phrase "higher level of service" is not defined in article XIII B or in the ballot materials. [Citation omitted.] A mere increase in the cost of providing a service which is the result of a requirement mandated by the state is not tantamount to a higher level of service. [Citation omitted.] However, a review of the Executive Order and guidelines shows that a higher level of service is mandated because the requirements go beyond constitutional and case law requirements. . . . While these steps fit within the "reasonably feasible" description of [case law], the point is that these steps are no longer merely being suggested as options which the local school district may wish to consider but are required acts. These requirements constitute a higher level of service. We are supported in our conclusion by the report of the Board to the Legislature regarding its decision that the Claim is reimbursable: "Only those costs that are above and beyond the regular level of service for like pupils in the district are reimbursable." "67, 68

⁶³ Exhibit B to Item 9 of the May 27, 2004 Commission Hearing.

⁶⁴ County of Los Angeles, supra, 43 Cal.3d at page 56.

⁶⁵ Long Beach Unified School District, supra, 225 Cal.App.4th 155.

⁶⁶ *Id.* at page 173.

⁶⁷ *Ibid.*, emphasis added.

⁶⁸ See also, County of Los Angeles v. Commission on State Mandates (2003) 110 Cal.App.4th 1176, 1193-1194, where the Second District Court of Appeal followed the earlier rulings and held that in the case of an existing program, reimbursement is required only when the state is divesting itself of its responsibility to provide fiscal support for a program, or is forcing a new program on a locality for which it is ill-equipped to allocate funding.

Thus, in order for the 1975 and 1986 amendments to the Stull Act, relating to certificated non-instructional personnel, to impose a new program or higher level of service, the Commission must find that the state is imposing new required acts or activities on school districts beyond those already required by law.

For the reasons described below, the Commission finds that school districts have been required to develop job responsibilities for certificated non-instructional employees, evaluate and assess certificated non-instructional employees, draft written evaluations of certificated non-instructional employees, receive and review written responses to the evaluation from certificated non-instructional employees, and conduct meetings regarding the evaluation with certificated non-instructional employees under the Stull Act since 1971, before the enactment of the test claim legislation.

Claimant argues that the statutory amendments to the Stull Act, by themselves, reflect the legislative intent to change the law. However, the intent to change the law may not always be presumed by an amendment, as suggested by the claimant. The court has recognized that changes in statutory language can be intended to clarify the law, rather than change it.

We assume the Legislature amends a statute for a purpose, but that purpose need not necessarily be to change the law. [Citation.] Our consideration of the surrounding circumstances can indicate that the Legislature made ... changes in statutory language in an effort only to clarify a statute's true meaning. [Citations omitted.]⁶⁹

Thus, to determine whether the Stull Act, as originally enacted in 1971, applied to all certificated employees of a school district, instructional and non-instructional employees alike, the Commission must apply the rules of statutory construction. Under the rules of statutory construction, the first step is to look at the statute's words and give them their plain and ordinary meaning. Where the words of the statute are not ambiguous, they must be applied as written and may not be altered in any way. Moreover, the intent must be gathered with reference to the whole system of law of which it is a part so that all may be harmonized and have effect.⁷⁰

As indicated by the plain language of former Education Code sections 13485,13487, 13488, and 13489, school districts were required under prior law to develop evaluation and assessment guidelines for the evaluation of "certificated" employees, evaluate and assess "certificated" employees on a continuing basis, draft written evaluations of "certificated" employees, receive and review written response to the evaluation from "certificated" employees, and conduct meetings regarding the evaluation with "certificated" employees. The plain language of these statutes does not distinguish between instructional employees (teachers) and non-instructional employees (principals, administrators), or specifically exclude certificated non-instructional employees. When read in context with the whole system of law of which these statutes are a part, the requirements of the Stull Act originally applied to *all* certificated employees under prior law.

As enacted, the Stull Act was placed in Chapter 2 of Division 10 of the 1971 Education Code, a chapter addressing "Certificated Employees." Certificated employees are those employees

⁶⁹ Western Security Bank v. Superior Court (1997) 15 Cal.4th 232, 243.

⁷⁰ People v. Thomas (1992) 4 Cal.4th 206, 210.

directly involved in the educational process and include both instructional and non-instructional employees such as teachers, administrators, supervisors, and principals. Certificated employees must be properly credentialed for the specific position they hold. A "certificated person" was defined in former Education Code section 12908 as "a person who holds one or more documents such as a certificate, a credential, or a life diploma, which singly or in combination license the holder to engage in the school service designated in the document or documents. The definition of "certificated person" governs the construction of Division 10 of the former Education Code and is not limited to instructional employees.

Thus, the plain language of former Education Code sections 13485,13487, 13488, and 13489 read within the context of Chapter 2 of Division 10 of the 1971 Education Code, a division that governs both instructional and non-instructional certificated employees, required school districts to develop evaluation and assessment guidelines and to evaluate both instructional and non-instructional certificated employees based on the guidelines on a continuing basis.

In addition, former Education Code section 13486, as enacted in 1971, expressly required school districts to avail themselves "of the advice of the *certificated instructional personnel* in the district's organization of certificated personnel" when developing and adopting the evaluation guidelines. (Emphasis added.) Former Education Code sections 13485,13487, 13488, and 13489, enacted at the same time, did not limit the evaluation and assessment requirements to "certificated instructional personnel" only. Rather, "certificated employees" were required to be evaluated. Thus, had the Legislature intended to require school districts to evaluate and assess only teachers, as argued by claimant, they would have limited the requirements of former Education Code sections 13485,13487, 13488, 13489 to "certificated instructional personnel." Under the rules of statutory construction, the Commission is prohibited from altering the plain language of a statute, or writing into a statute, by implication, express requirements that the Legislature itself has not seen fit to place in the statute.⁷⁴

Moreover, under prior law, the Legislature expressly excluded certain types of certificated employees from the requirements of the Stull Act, and never expressly excluded non-instructional employees. When the Stull Act was originally enacted in 1971, the Legislature excluded employees of community colleges from the requirements. In 1972, the Legislature revisited the Stull Act and expressly excluded certificated personnel employed on an hourly basis in adult education classes. In 1973, school districts were authorized to exclude hourly and temporary certificated employees, and substitute teachers from the evaluation requirement. Under the rules of statutory construction, where exceptions to a general rule are specified by

⁷¹ Former Education Code section 13187 et seq. of the 1971 Education Code.

⁷² Former Education Code section 13251 et seq. of the 1971 Education Code.

⁷³ Former Education Code 12901 of the 1971 Education Code.

⁷⁴ Whitcomb v. California Employment Commission (1944) 24 Cal.2d 753, 757; In re Rudy L. (1994) 29 Cal.App.4th 1007, 1011.

⁷⁵ Section 42 of Statutes 1971, chapter 361.

⁷⁶ Statutes 1972, chapter 535.

⁷⁷ Statutes 1973, chapter 220.

statute, other exceptions are not to be implied or presumed, absent a discernible and contrary legislative intent.⁷⁸ Thus, it cannot be implied from the plain language of the legislation that the Legislature intended to exclude certificated non-instructional employees from the requirements of the Stull Act.

The conclusion that the Stull Act applied to non-instructional employees under prior law is further supported by case law. In 1977, the First District Court of Appeal considered *Grant v. Adams.*⁷⁹ The *Grant* case involved a school district employee who was a certified teacher with credentials as an administrator who had been serving as a principal (a non-instructional employee) of an elementary school from 1973 through 1974. In May 1974, the employee was reassigned and demoted to a teaching position for the 1974-1975 school year.⁸⁰ The employee made the argument that the Stull Act, when coupled with other statutory provisions, created a property interest in his position as a principal and required that an evaluation be conducted before termination of an administrative assignment. The court disagreed with the employee's argument, holding that the Stull Act evaluation was not a precondition to reassignment or dismissal.⁸¹ When analyzing the issue, the court made the following findings:

In 1971, the Legislature passed the so-called "Stull Act," Education Code sections 13485-13490. Among other things the Stull Act required that all school districts establish evaluation procedures for certificated personnel. (Ed. Code, § 13485.) The state board of education developed guidelines for evaluation of administrators and teachers pursuant to the Stull Act. Respondents [school district] adopted those guidelines without relevant change in June 1972. The guidelines called for evaluation of personnel on permanent status at least once every two years. Appellant was given no evaluation pursuant to the guidelines. (Emphasis added.)⁸²

In 1979, the California Supreme Court decided *Miller v. Chico Unified School District Board of Education*, a case with similar facts.⁸³ In the *Miller* case, the employee was a principal of a junior high school from 1958 until 1976, when he was reassigned to a teaching position. In 1973, the school board adopted procedures to formally evaluate administrators pursuant to the Stull Act.⁸⁴ The employee received a Stull Act evaluation in 1973, 1974, and 1975.⁸⁵ In 1976, the school board requested the employee's cooperation in his fourth annual Stull evaluation report, but the employee refused on advice of counsel.⁸⁶ The employee sought reinstatement to

⁷⁸ People v. Galambos (2002) 104 Cal.App.4th 1147.

⁷⁹ Grant v. Adams (1977) 69 Cal.App.3d 127.

⁸⁰ Id. at page 130.

⁸¹ Id. at pages 134-135.

⁸² Id. at page 143, footnote 3.

⁸³ Miller v. Chico Unified School District Board of Education (1979) 24 Cal.3d 703.

⁸⁴ *Id.* at page 707.

⁸⁵ *Id.* at pages 708-710, 717.

⁸⁶ *Id.* at page 709.

his position as a principal on the ground that the school board failed to comply with the Stull Act.⁸⁷ The court denied the employee's request and made the following findings:

The record indicates, however, that the school board substantially complied with the Stull Act's mandate that the board fix performance guidelines for its certificated personnel, evaluate plaintiff in light of such guidelines, inform plaintiff of the results of any evaluation, and suggest to plaintiff ways to improve his performance.

The school board's guidelines provide for annual evaluations of supervisory personnel; accordingly, the board evaluated plaintiff in 1973, 1974, and 1975. Although plaintiff received generally satisfactory evaluations in 1973 and 1974, the board's evaluation report in 1974 contains suggestions for specific areas of improvement. . . .

Plaintiff's final Stull Act evaluation in June 1975 plainly notified plaintiff "in writing" of any unsatisfactory conduct on his part, and in addition provided a forum for plaintiff's supervisors to make "specific recommendations as to areas of improvement in the employee's performance and endeavor to assist him in such performance." [Former Ed. Code, § 13489.)...

The court is surely obligated to understand the purpose of ... [the Stull Act] and to apply those sections to the relevant facts.⁸⁸

Finally, the legislative history of the 1986 test claim legislation supports the conclusion that the specific language added to the Stull Act was not intended to impose new required acts on school districts. As stated above, the test claim legislation (Stats. 1986, ch. 393) amended Education Code section 44663 by adding subdivision (b) to provide that the evaluation and assessment of certificated non-instructional employees shall be reduced to writing before June 30 of the year that the evaluation is made, that an opportunity to respond be given to the certificated non-instructional employee, and that a meeting be held between the certificated non-instructional employee and the evaluator to discuss the evaluation before July 30. The legislative history of Statutes 1986, chapter 393 (Assem. Bill No. 3878) indicates that the purpose of the bill was to extend for 45 days the *current* requirement for the evaluation of certificated non-instructional employees. The analysis of Assembly Bill 3878 by the Assembly Education Committee, dated

⁸⁷ *Id.* at page 716.

⁸⁸ *Id.* at pages 717-718.

⁸⁹ Letter from San Diego Unified School District to the Honorable Teresa Hughes, Chairperson of the Assembly Education Committee, on Assembly Bill 3878, April 4, 1986; Assembly Education Committee, Republican Analysis on Assembly Bill 3878, April 7, 1986; Department of Finance, Enrolled Bill Report on Assembly Bill 3878, April 21, 1986; Legislative Analyst, Analysis of Assembly Bill 3878, April 24, 1986; Assembly Education Committee, Republican Analysis on Assembly Bill 3878, April 26, 1986; Senate Committee on Education, Staff Analysis on Assembly Bill 3878, May 28, 1986; Legislative Analyst, Analysis of Assembly Bill 3878, June 18, 1986. (Exhibit I to Item 9 of the May 27, 2004 Commission Hearing.)

April 7, 1986, states the following:

Current statute requires evaluations of noninstructional certificated employees on 12 month contracts to be conducted within 30 days before the last school day. This apparently is a problem for San Diego [Unified School District] because all evaluations are jammed in at the end of the school year. They feel it would make more sense to allow extra time to evaluate those on 12 month contracts and spread the process out over a longer period of time.⁹⁰

The April 24, 1986 analysis of Assembly Bill 3878 by the Legislative Analyst states the following:

Our review indicates that this bill does not mandate any new duties on school district governing boards, but simply extends the date by which evaluations of certain certificated employees must be completed.⁹¹

Based on the foregoing authorities, the Commission finds that school districts were required under prior law to perform the following activities:

- Develop and adopt specific evaluation and assessment guidelines for the performance of certificated non-instructional personnel.
- Evaluate and assess certificated non-instructional personnel as it relates to the established standards.
- Prepare and draft a written evaluation of the certificated non-instructional employee. The evaluation shall include recommendations, if necessary, as to areas of improvement.
- Receive and review from a certificated non-instructional employee written responses regarding the evaluation.
- Prepare and hold a meeting between the certificated non-instructional employee and the evaluator to discuss the evaluation and assessment.

The Commission further finds that the language added to former Education Code section 13487 by the 1975 test claim legislation to "establish and define job responsibilities" for certificated non-instructional personnel falls within the preexisting duty to develop and adopt objective evaluation and assessment guidelines for all certificated employees, does not mandate any new required acts, and, thus, does not constitute a new program or higher level of service.⁹²

Accordingly, the Commission finds that the 1975 and 1986 amendments to former Education Code sections 13485 and 13487 and Education Code section 44663 as they relate to certificated non-instructional employees do not constitute a new program or higher level of service.⁹³

⁹⁰ Id. at page 301.

⁹¹ *Id.* at page 306.

⁹² Long Beach Unified School District, supra, 225 Cal. App. 4th at page 173.

⁹³ It is noted that the analysis by the Legislative Analyst on Senate Bill 777, which was enacted as Statutes 1975, chapter 1216, concludes that "there would also be undetermined increased local costs due to the addition of ... non-instructional certificated employees in evaluation and

Establish standards of expected pupil achievement at each grade level in each area of study (Former Ed. Code, § 13487, as repealed and reenacted by Stats. 1975, ch. 1216).

The claimant is requesting reimbursement to establish standards of expected pupil achievement at each grade level in each area of study.

Former Education Code section 13487, as originally enacted in 1971, required school districts to develop and adopt specific evaluation and assessment guidelines for certificated personnel. Former section 13487 stated in relevant part the following:

The governing board of each school district shall develop and adopt specific evaluation and assessment guidelines which shall include but shall not necessarily be limited in content to the following elements:

(a) The establishment of standards of expected student progress in each area of study and of techniques for the assessment of that progress.

The test claim legislation, in Statutes 1975, chapter 1216, repealed and reenacted former Education Code section 13487. As reenacted, the statute provided the following (amendments relevant to this issue are reflected with strikeout and underline):

(a) The governing board of each school district shall establish standards of expected student progress achievement at each grade level in each area of study.

The claimant contends that the 1975 test claim legislation imposed a new program or higher level of service on school districts to rewrite standards for employee assessment to reflect expected student "achievement" (as opposed expected student "progress") and to expand the standards to reflect expected student achievement at each "grade level." The claimant further states the following:

Prior law only required that the standards of expected student achievement be established to show student progress. Under prior law, these standards may have tracked student progress over time. For example, a school district may have established reading standards for pupils upon graduating from eighth grade. Under the test claim legislation, school districts no longer have the ability to determine over what period standards of expected student achievement will be

assessment requirements." (See, Exhibit I, pp. 292-294.) The courts have determined, however, that legislative findings are not relevant to the issue of whether a reimbursable statemandated program exists:

[T]he statutory scheme [in Government Code section 17500 et seq.] contemplates that the Commission, as a quasi-judicial body, has the sole and exclusive authority to adjudicate whether a state mandate exists. Thus, any legislative findings are irrelevant to the issue of whether a state mandate exists..." (City of San Jose, supra, 45 Cal.App.4th at pp. 1817-1818, quoting County of Los Angeles v. Commission on State Mandates (1995) 32 Cal.App.4th 805, 819, and Kinlaw v. State of California, supra, 54 Cal.3d at p. 333.)

⁹⁴ Exhibit A (Test Claim, page 4) to Item 9 of the May 27, 2004 Commission Hearing.

established: The standards must be established by each grade level. The new standards outlined in the test claim legislation align more closely with the state's new content standards..."⁹⁵

The Department of Finance contends that the 1975 amendment to former Education Code section 13487 does not constitute a new program or higher level of service. The Department states the following:

Finance notes that in practice, school district standards required by Chapter 361/71 would have had to have been differentiated by grade in order to provide a measure of "expected student progress." Finance also notes that changing the term "expected student progress" to the term "expected student achievement" is a wording change that would not require additional work on the part of school districts. These changes did not require additional work on the part of school districts, and therefore, are not reimbursable. 96.97

In order for the 1975 reenactment of former Education Code section 13487 to constitute a new program or higher level of service, the Commission must find that the state is imposing new required acts or activities on school districts beyond those already required by law. For the reasons below, the Commission finds that the 1975 reenactment of former Education Code section 13487 does not constitute a new program or higher level of service.

On its face, the activities imposed by the 1975 reenactment of former Education Code section 13487 do not appear different than the activities required by the original 1971 version of former Education Code section 13487. Both versions require that standards for evaluation be established so that certificated personnel are evaluated based on student progress. As originally enacted in 1971, "[t]he governing board of each school district shall develop and adopt specific evaluation and assessment guidelines which shall include ... the establishment of standards of expected student progress in each area of study ... [and the] ... assessment of certificated personnel competence as it relates to the established standards." (Emphasis added.) As reenacted in 1975, "[t]he governing board of each school district shall establish standards of expected student achievement at each grade level in each area of study ... and evaluate and assess certificated employee competency as it reasonably relates to ... the progress of students toward the established standards." (Emphasis added.)

⁹⁵ Exhibit C, page 2, to Item 9 of the May 27, 2004 Commission Hearing.

⁹⁶ Exhibit B, page 1, to Item 9 of the May 27, 2004 Commission Hearing.

⁹⁷ The Department of Finance's factual assertion is not supported by "documentary evidence ... authenticated by declarations under penalty of perjury signed by persons who are authorized and competent to do so," as required by the Commission's regulations. (Cal. Code Regs., tit. 2, § 1183.02, subd. (c)(1).)

⁹⁸ County of Los Angeles, supra, 43 Cal.3d at page 56; Long Beach Unified School Dist., supra, 225 Cal.App.4th at page 173; and County of Los Angeles, supra, 110 Cal.App.4th at pages 1193-1194.

In addition, the legislative history of the test claim statute, Statutes 1975, chapter 1216 (Sen. Bill No. 777), does not reveal an intention by the Legislature to impose new required acts. Legislative history simply indicates that the language was "modified." ⁹⁹

Moreover, claimant's argument, that the test claim statute imposes a higher level of service because, under prior law, school districts "may" have only tracked student progress over time (for example, by establishing "reading standards for pupils upon graduating from eighth grade"), is not persuasive. Under the claimant's interpretation, the performance of a first grade teacher could be evaluated and assessed based on reading standards for eighth grade students; students that the teacher did *not* teach. The Stull Act, as originally enacted, required the school district to evaluate and assess the performance of all certificated employees based on the progress of their pupils. In addition, the claimant's factual assertion is not supported by "documentary evidence ... authen ticated by declarations under penalty of perjury signed by persons who are authorized and competent to do so," as required by the Commission's regulations.¹⁰⁰

Finally, assuming for the sake of argument only, that school districts were required to establish new standards of expected student achievement due to the 1975 test claim statute, that activity would have occurred outside the reimbursement period for this claim. The reimbursement period for this test claim, if approved by the Commission, begins July 1, 1998. The test claim statute was enacted in 1975, 23 years earlier than the reimbursement period. There is no requirement in the test claim statute that establishing the standards is an ongoing activity.

Therefore, based on the evidence in the record, the Commission finds that former Education Code section 13487 as reenacted by Statutes 1975, chapter 1216, does not impose a new program or higher level of service on school districts.

Evaluate and assess the performance of certificated instructional employees (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498 and Stats. 1999, ch. 4).

The claimant requests reimbursement to evaluate and assess the performance of certificated instructional employees as it reasonably relates to the following:

- the instructional techniques and strategies used by the certificated employee (Stats. 1983, ch. 498);
- the certificated employee's adherence to curricular objectives (Stats 1983, ch. 498); and
- the progress of pupils towards the state adopted academic content standards as measured by state adopted criterion referenced assessments (Stats. 1999, ch. 4).¹⁰¹

⁹⁹ Senate Committee on Education, Staff Analysis on Senate Bill 777, as amended on May 7, 1975; Assembly Education Committee, Analysis of Senate Bill 777, as amended on August 12, 1975; Ways and Means Staff Analysis on Senate Bill 777, as amended on August 19, 1975; Legislative Analyst, Analysis of Senate Bill 777, as amended on August 19, 1975, dated August 22, 1975; Assembly Third Reading of Senate Bill 777, as amended on August 19, 1975. (Exhibit I to Item 9 of the May 27, 2004 Commission Hearing.)

¹⁰⁰ Cal. Code Regs., tit. 2, § 1183.02, subd. (c)(1).

¹⁰¹ Exhibit A (Test Claim, page 6) to Item 9 of the May 27, 2004 Commission Hearing.

The Department of Finance agrees that these activities constitute reimbursable state-mandated activities under article XIII B, section 6. 102

For the reasons described below, the Commission finds that evaluating and assessing the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law based on these factors constitutes a new program or higher level of service.

The instructional techniques and strategies used by the employee, and the employee's adherence to curricular objectives. In 1983, the test claim legislation amended Education Code section 44662, subdivision (b), to require the school district to evaluate and assess certificated employee competency as it reasonably relates to "the instructional techniques and strategies used by the employee," and "the employee's adherence to curricular objectives." (Stats. 1983, ch. 498.)

Before the 1983 test claim legislation was enacted, the Stull Act required school districts to establish an objective and uniform system of evaluation and assessment of the performance of certificated personnel. When developing these guidelines, school districts were required to receive advice from certificated instructional personnel. The court interpreted this provision to require districts to meet and confer, and engage in collective bargaining, with representatives of certificated employee organizations before adopting the evaluation guidelines. Thus, certificated instructional employees were evaluated based on the guidelines developed through collective bargaining, and on the following criteria required by the state:

- the progress of students toward the established standards of expected student achievement at each grade level in each area of study; and
- the establishment and maintenance of a suitable learning environment within the scope of the employee's responsibilities. 105

Under prior law, the evaluation had to be reduced to writing and a copy of the evaluation given to the employee. An evaluation meeting had to be held between the certificated employee and the evaluator to discuss the evaluation and assessment.¹⁰⁶

The 1983 test claim statute still requires school districts to reduce the evaluation to writing, to transmit a copy to the employee, and to conduct a meeting with the employee to discuss the evaluation and assessment.¹⁰⁷ These activities are not new. However, the 1983 test claim statute amended the evaluation requirements by adding two new evaluation factors: the instructional

Test Claim 98-TC-25, Statement of Decision

¹⁰² Exhibit B to Item 9 of the May 27, 2004 Commission Hearing.

¹⁰³ Former Education Code sections 13485 and 13487.

¹⁰⁴ Certificated Employees Council of the Monterey Peninsula Unified School District v. Monterey Peninsula Unified School District (1974) 42 Cal.App.3d 328, 334.

¹⁰⁵ Former Education Code section 13487, subdivision (b), as amended by Statutes 1975, chapter 1216.

¹⁰⁶ Former Education Code sections 13485-13490, as originally enacted by Statutes 1971, chapter 361.

¹⁰⁷ Education Code sections 44662, 44663, 44664.

techniques and strategies used by the employee, and the employee's adherence to curricular objectives. Thus, school districts are now required by the state to evaluate and assess the competency of certificated instructional employees as it reasonably relates to:

- the progress of students toward the established standards of expected student achievement at each grade level in each area of study;
- the instructional techniques and strategies used by the employee;
- the employee's adherence to curricular objectives; and
- the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities.

School districts may have been evaluating teachers on their instructional techniques and adherence to curricular objectives before the enactment of the test claim statute based on the evaluation guidelines developed through the collective bargaining process. But, the state did not previously require the evaluation in these two areas. Government Code section 17565 states that "if a ... school district, at its option, has been incurring costs which are subsequently mandated by the state, the state shall reimburse the ... school district for those costs after the operative date of the mandate."

Accordingly, the Commission finds that Education Code section 44662, subdivision (b), as amended by Statutes 1983, chapter 498, imposes a new required act and, thus, a new program or higher level of service on school districts to evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives.

Reimbursement for this activity is limited to the review of the employee's instructional techniques and strategies and adherence to curricular objectives, and to include in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:

- once each year for probationary certificated employees;
- every other year for permanent certificated employees; and
- beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801)¹⁰⁸, and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.¹⁰⁹

¹⁰⁸ Section 7801 of title 20 of the United States Code defines "highly qualified" as a teacher that has obtained full state certification as a teacher or passed the state teacher licensing examination, and holds a license to teach, and the teacher has not had certification requirements waived on an emergency, temporary, or provisional basis.

¹⁰⁹ Education Code section 44664, subdivision (a)(3), as amended by Statutes 2003, chapter 566.

State adopted academic content standards as measured by state adopted assessment tests. In 1999, the test claim legislation (Stats. 1999, ch. 4) amended Education Code 44662, subdivision (b)(1), by adding the following underlined language:

The governing board of each school district shall evaluate and assess certificated employee competency as it reasonably relates to:

The progress of pupils toward the standards established pursuant to subdivision (a) [standards of expected pupil achievement at each grade level in each area of study] and, if applicable, the state adopted academic content standards as measured by state adopted criterion referenced assessments.

Before the 1999 test claim legislation, school districts were required to evaluate and assess certificated employees based on the progress of pupils. The progress of pupils was measured by standards, adopted by *local school districts*, of expected student achievement at each grade level in each area of study. The evaluation had to be reduced to writing and a copy of the evaluation given to the employee. An evaluation meeting had to be held between the certificated employee and the evaluator to discuss the evaluation and assessment.¹¹⁰

The 1999 test claim legislation still requires school districts to evaluate and assess certificated employees based on the progress of pupils. It also still requires school districts to reduce the evaluation to writing, to transmit a copy to the employee, and to conduct a meeting with the employee to discuss the evaluation and assessment.¹¹¹ These activities are not new.

However, the test claim legislation, beginning January 1, 2000¹¹², imposes a new requirement on school districts to evaluate the performance of certificated employees as it reasonably relates to the progress of pupils based not only on standards adopted by local school districts, but also on the academic content standards adopted by the *state*, as measured by the state adopted assessment tests.

The state academic content standards and the assessment tests that measure the academic progress of students were created in 1995 with the enactment of the California Assessment of Academic Achievement Act. The act required the State Board of Education to develop and adopt a set of statewide academically rigorous content standards in the core curriculum areas of reading, writing, mathematics, history/social science, and science to serve as the basis for assessing the academic achievement of individual pupils and of schools. In addition, the Act established the Standardized Testing and Reporting Program (otherwise known as the STAR Program), which requires each school district to annually administer to all pupils in grades 2 to 11 a nationally normed achievement test of basic skills, and an achievement test based on the

¹¹⁰ Former Education Code sections 13485-13490, as originally enacted by Statutes 1971, chapter 361.

¹¹¹ Education Code sections 44662, 44663, 44664.

¹¹² Statutes 1999, chapter 4 became operative and effective on January 1, 2000.

¹¹³ Education Code section 60600 et seq.

¹¹⁴ Education Code section 60605, subdivision (a).

¹¹⁵ Education Code section 60640, subdivision (a).

state's academic content standards. The Commission determined that the administration of the STAR test to pupils constitutes a partial reimbursable state-mandated program (CSM 97-TC-23).

Although evaluating the performance of a certificated employee based on the progress of pupils is not new, the Commission finds that the requirement to evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted criterion referenced assessments is a new required act and, thus a higher level of service within the meaning of article XIII B, section 6 of the California Constitution.

This higher level of service is limited to the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- once each year for probationary certificated employees;
- every other year for permanent certificated employees; and
- beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.

Assess and evaluate permanent certificated, instructional and non-instructional, employees that receive an unsatisfactory evaluation once each year until the employee achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498).

The claimant is requesting reimbursement to conduct additional assessments and evaluations for permanent certificated employees that receive an unsatisfactory evaluation as follows:

Conduct additional annual assessments and evaluations of permanent certificated instructional and non-instructional employees who have received an unsatisfactory evaluation. The school district must conduct the annual assessment and evaluation of a permanent certificated employee until the employee achieves a positive evaluation or is separated from the school district. This mandated activity is limited to those annual assessments and evaluations that occur in years in which the employee would not have been required to be evaluated as per Section 44664 (i.e., permanent certificated employees shall be evaluated every other year). When conducting these additional evaluations the full cost of the

¹¹⁶ Education Code section 60640, subdivision (b).

¹¹⁷ Education Code section 44664, subdivision (a)(3), as amended by Statutes 2003, chapter 566.

evaluation is reimbursable (e.g., evaluation under all criterion, preparing written evaluation, review of comments, and holding a hearing with the teacher). 118

The Department of Finance agrees that the 1983 amendment to Education Code section 44664 imposes a reimbursable state-mandated activity.

Before the enactment of the test claim legislation, former Education Code section 13489 (as last amended by Stats. 1973, ch. 220) required that an evaluation for permanent certificated employees occur every other year. Former Education Code section 13489 stated in relevant part the following:

Evaluation and assessment of the performance of each certificated employee shall be made on a continuing basis, at least once each school year for probationary personnel, and at least every other year for personnel with permanent status. The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. In the event an employee is not performing his duties in a satisfactory manner according to the standards prescribed by the governing board, the employing authority shall notify the employee in writing of such fact and describe such unsatisfactory performance. The employing authority shall thereafter confer with the employee making specific recommendations as to areas of improvement in the employee's performance and endeavor to assist him in such performance. (Emphasis added.)

In 1976, former Education Code section 13489 was renumbered to Education Code section 44664.¹¹⁹ The test claim legislation (Stats. 1983, ch. 498) amended Education Code section 44664, by adding the following sentence: "When any permanent certificated employee has received an unsatisfactory evaluation, the employing authority shall *annually evaluate* the employee until the employee achieves a positive evaluation or is separated from the district." (Emphasis added.)¹²⁰

The Commission finds that Education Code section 44664, as amended by Statutes 1983, chapter 498, imposes a new required act and, thus, a new program or higher level of service by requiring school districts to perform additional evaluations for permanent certificated employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation.

This higher level of service is limited to those annual assessments and evaluations that occur in years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year) and lasts until the employee achieves a positive evaluation or is separated from the school district. This additional evaluation

¹¹⁸ Exhibit A (Test Claim) to Item 9 of the May 27, 2004 Commission Hearing.

¹¹⁹ Statutes 1976, chapter 1010.

¹²⁰ Statutes 2003, chapter 566, amended Education Code section 44664 by changing the word "when" to "if." The language now states the following: "When If any permanent certificated employee has received an unsatisfactory evaluation, the employing authority shall annually evaluate the employee until the employee achieves a positive evaluation or is separated from the district."

and assessment of the permanent certificated employee requires the school district to perform the following activities:

- evaluate and assess the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));
- the evaluation and assessment shall be reduced to writing. (Ed. Code, § 44663, subd. (a).) The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
- transmit a copy of the written evaluation to the certificated employee (Ed. Code, § 44663, subd. (a));
- attach any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and
- conduct a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a)).

# Issue 3: Does Education Code Section 44662 (As Amended by Stats. 1999, ch. 4) and Education Code Section 44664 (As Amended by Stats. 1983, ch. 498) Impose Costs Mandated by the State Within the Meaning of Government Code Section 17514?

As indicated above, the Commission finds that the following activities constitute a new program or higher level of service:

- evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498);
- evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Ed. Code, § 44662, subd. (b), as amended by Stats. 1999, ch. 4); and
- assess and evaluate permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law

and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated until the employee receives achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498).

The Commission must continue its inquiry to determine if these activities result in increased costs mandated by the state pursuant to Government Code section 17514.

Government Code section 17514 defines "costs mandated by the state" as any increased cost a local agency or school district is required to incur as a result of a statute that mandates a new program or higher level of service. The claimant states that it has incurred significantly more than \$200 to comply with the test claim statutes plead in this claim. 121, 122

The Commission finds that there is nothing in the record to dispute the costs alleged by the claimant. The parties have not identified any sources of state or federal funds appropriated to school districts that can be applied to the activities identified above. Moreover, none of the exceptions to finding a reimbursable state-mandated program under Government Code section 17556 apply to this claim.

Therefore, the Commission finds that Education Code section 44662 (as amended by Stats. 1999, ch. 4) and Education Code section 44664 (as amended by Stats. 1983, ch. 498), result in costs mandated by the state under Government Code section 17514.

#### **CONCLUSION**

The Commission concludes that Education Code section 44662, as amended by Statutes 1999, chapter 4, and Education Code section 44664, as amended by Statutes 1983, chapter 498, mandate a new program or higher level of service for school districts within the meaning of article XIII B, section 6 of the California Constitution, and impose costs mandated by the state pursuant to Government Code section 17514 for the following activities only:

• Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498).

Reimbursement for this activity is limited to the review of the employee's instructional techniques and strategies and adherence to curricular objectives, and to include in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:

- o once each year for probationary certificated employees;
- o every other year for permanent certificated employees; and

Exhibit A to Item 9 of the May 27, 2004 Commission Hearing (Test Claim and Declaration of Larry S. Phelps, Superintendent of Denair Unified School District).

¹²² After this test claim was filed, Government Code section 17564 was amended to require that all test claims and reimbursement claims submitted exceed \$1000 in costs. (Stats. 2002, ch. 1124.)

- o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Ed. Code, § 44662, subd. (b), as amended by Stats. 1999, ch. 4).

Reimbursement for this activity is limited to the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- o once each year for probationary certificated employees;
- o every other year for permanent certificated employees; and
- o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- Assess and evaluate permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year). The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district. (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498). This additional evaluation and assessment of the permanent certificated employee requires the school district to perform the following activities:
  - o evaluate and assess the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));

- o the evaluation and assessment shall be reduced to writing. (Ed. Code, § 44663, subd. (a).) The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
- o transmit a copy of the written evaluation to the certificated employee (Ed. Code, § 44663, subd. (a));
- o attach any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and
- o conduct a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a)).

The Commission further finds that the activities listed above do not constitute reimbursable state-mandated programs with respect to certificated personnel employed in local, discretionary educational programs.

Finally, the Commission finds that all other statutes in the test claim not mentioned above are not reimbursable state-mandated programs within the meaning of article XIII B, section 6 and Government Code section 17514.

#### **DECLARATION OF SERVICE BY MAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

June 1, 2004, I served the:

#### **Adopted Statement of Decision**

The Stull Act, 98-TC-25

Education Code Sections 44660 – 44665 (formerly Ed. Code §§ 13485-13490) Statutes 1975, Chapter 1216; Statutes 1983, Chapter 498; Statutes 1986, Chapter 393; Statutes 1995, Chapter 392; Statutes 1999, Chapter 4 Denair Unified School District, Claimant

by placing a true copy thereof in an envelope addressed to:

Mr. David Scribner
Executive Director
School Mandates Group
3113 Catalina Island Road
West Sacramento, CA 95691

State Agencies and Interested Parties (See attached mailing list);

and by sealing and depositing said envelope in the United States mail at Sacramento, California, with postage thereon fully paid.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on

June 1, 2004, at Sacramento, California.

VICTORIA SORIANO

## Tab 4



#### JOHN CHIANG

California State Controller

June 24, 2010

Walter Freeman Assistant Superintendent, Business Services Carlsbad Unified School District 6225 El Camino Real Carlsbad, CA 92009

Re: <u>Audit of Mandated Cost Claims for Stull Act Program</u> For the Period of July 1, 1999, through June 30, 2009

Dear Mr. Freeman:

This letter confirms that Daniel Moreno has scheduled an audit of Carlsbad Unified School District's legislatively mandated Stull Act Program cost claims filed for fiscal year (FY) 1999-2000, FY 2000-01, 2001-02, FY 2002-03, FY 2003-04, FY 2004-05, FY 2005-06, FY 2006-07, FY 2007-08, and FY 2008-09. Government Code sections 12410, 17558.5, and 17561 provide the authority for this audit. The entrance conference is scheduled for Wednesday, August 25, 2010, at 11:00 a.m. We will begin audit fieldwork after the entrance conference.

Please furnish working accommodations for and provide the necessary records (listed on the Attachment) to the audit staff. If you have any questions, please call me at (916) 327-3138.

Sincerely,

Original signed by

DEANNA SKOLFIELD, Audit Manager Mandated Cost Audits Bureau Division of Audits

DS/sk

Attachment

8676

Walter Freeman June 24, 2010 Page 2

cc: Jim L. Spano, Bureau Chief (via e-mail)

Division of Audits, State Controller's Office

Daniel Moreno, Auditor-in-Charge (via e-mail)

Division of Audits, State Controller's Office

Angie Teng, Section Supervisor (via e-mail)

Division of Accounting and Reporting, State Controller's Office

Mark Tanner, President of the Board of Education

Carlsbad Unified School District

John A. Roach, Ed.D., Superintendent

Carlsbad Unified School District

Randolph E. Ward, Ed.D., County Superintendent of Schools

San Diego County Office of Education

Nancy Navarro, Director Fiscal Services

Carlsbad Unified School District

Scott Hannan, Director (via e-mail)

School Fiscal Services Division

California Department of Education

Thomas Todd Principal Program Budget Analyst (via e-mail)

Education Systems Unit, California Department of Finance

## Carlsbad Unified School District Records Request for Mandated Cost Program FY 1999-2000, FY 2000-01, FY 2001-02, FY 2002-03, FY 2003-04, FY 2004-05, FY 2005-06, FY 2006-07, FY 2007-08, and FY 2008-09

- 1. Copy of external and internal audit reports performed on the mandated cost program
- 2. Organization charts for the district effective during the audit period, showing employee names and position titles
- 3. Chart of accounts
- 4. Worksheets that support the productive hourly rate used, including support for benefit rates
- 5. Mandate worksheets used to support cost claimed
- 6. Employee time sheets or time logs
- 7. Access to payroll records showing employee salaries and benefits paid during the audit period
- 8. Access to general ledger accounts that support disbursements
- 9. Documentation that supports amounts received from other funding sources
- 10. Copies of invoices and other documents necessary to support costs claimed
- 11. List of evaluators and names of teachers to be evaluated each year
- 12. Teacher contracts with school district
- 13. Sample evaluation forms

Tab 5

Carlsbad Unified School District
The Stull Act
Evaluation Activities Calculation - Revisions to the Draft Report
July 1, 2005, through June 30, 2009
S10-MCC-039

(B) Average Hours per

Evaluation

10.625

10.625

10.625

10.625

Total Hours

(A) x (B)

1,891.3 \$

1,190.0

2,220.6

7,012.5

1,710.6 \$

Average

Productive

**Hourly Rate** 

65.76

69.67

68.34

84.61

Total

Salaries &

Benefits

(C) x (D)

124,372

82,907

151,756

144,734

503,769

Time Study

Completed

Evaluations

178

112

209

161

660

Fiscal

Year

2005-06

2006-07

2007-08

2008-09

**Total** 

A.6.5 P.1/1 Revised finding

_219,233

**∃** A.1.1

Audited							183		, J. H. M.
	Type of Teache	r							
(a) Permanent	(b) Probationary	(c) Temporary	(d) Completed Evaluations (a) + (b) + (c)	(e) Categorical / Grant Teachers	(f) Reimbursable Evaluations (d) - (e)	(g) Average Hours per Evaluation	(h) Total Hours (f) x (g)	(i) Average Productive Hourly Rate	(j) Total Salaries & Benefits (h) x (i)
106	44	16	166	6	160	5.14	822.4	\$ 65.76	\$ 54,081
108	1	3	112	6	106	5.14	544.8	69.67	37,956
159	12	36	207	6	201	5.14	1,033.1	68.34	70,602
113	9	32	154	7	147	5.14	755.6	\$ 74.90	\$ 56,594

25

Di	fference
	(j) - (E)
\$	(70,291)
	(44,951)
	(81,154)
\$	(88,140)
\$	(284,536)

	Be	fore receip	t of	additiona	l do	cumentation		
		Claimed		Audited	Difference			
2005-06	\$	97,325	\$	54,758	\$	(42,567)		
2006-07		155,019		37,601		(117,418)		
2007-08		128,560		70,602		(57,958)		
2008-09	_	96,252		55,052	<u>.</u>	(41,200)		
 Total	\$	477,156	\$	218,013	\$	(259,143)		

		primi	dditional d		
(	laimed		Audited `	D	ifference
\$	97,325	\$	54,081	\$	(43,244)
	155,019		37,956		(117,063)
	128,560		70,602		(57,958)
	96,252		56,594	L	(39,658)
\$	477,156	\$	219,233	\$	(257,923)
				M	A.6.5

87

639

- Evaluation Activities Adjustment

614

3,155.9

	Dif	ferençe be	twe	en Before	and	After rec	eipt of additional documentation
		Before		After	Di	fference	
2005-06	s	54,758	\$	54,081	\$	(677)	
2006-07		37,601		37,956		355	
2007-08		70,602		70,602		-	
2008-09	L	55,052		56,594		1,542	
l Total	\$	218,013	\$	219,233	\$	1,220	
							S

A2PS

■ A.1.1

Carlsbad Unified School District The Stull Act Evaluation Activities Calculation July 1, 2005, through June 30, 2009 S10-MCC-039

A5.PS

A.S.38 P.1/1

	Time Study	His.						Aud	ited						15					1	Difference
										Type of Teache	r										
		(B) Average		1	( <b>D</b> )	١.	(E)	1	(a)	(b)	(c)	(d)	(e)	<b>(f)</b>	(g)	(h)		(i)	(j) Total		
	Completed Evaluations	Hours per		1	erage		Total	Per	manent	Probationary	Temporary	Completed	Categorical /	Reimbursable	Average	Total	1	erage	Salaries &	l	
Fiscal	Evaluations	Evaluation	(A) x (B)		ductive dy Rate	1	laries & enefits					Evaluations (a) + (b) + (c)	Grant Teachers	Evaluations (d) - (e)	Hours per Evaluation	Hours (f) x (g)		luctive ly Rate	Benefits (h) x (i)		(j) - (E)
Year	A 5 22			11001	Ty reacc		() x (D)		- 1			(a) + (b) + (c)	Teachers	(4) - (6)	Evaluation	(1) X (g)	ոսա	iy Kate	(II) X (I)		1 1
	A.5.23	▲ A.5.35		À A.5.	24	<b>≜</b> A.	5.17	¥ A.5	.31				A.5.23		A.5.35		A.5.3	37		1	
2005-06	178	10.625	1,891.3	\$	65.76	\$	124,372		108	44	16	. 168	6	162	5.14	832.7	\$	65.76	\$ 54,758	A.5.40	\$ (69,614)
								¥ A.5				<del></del>									
2006-07	112	10.625	1,190.0		69.67		82,907		107	- 1	3	111	6	105	5.14	539.7		69.67	37,601	A.5.40	(45,306)
2007-08	209	10.625	2,220.6		68.34		151 756	<u>A.5.</u>		10	36	<del>&gt;</del> 207		201							ֈ
2007-00	209	10.023	2,220.0		08.34		151,756	107	161	10	36	207	6	201	5.14	1,033.1		68.34	70,602 <b><u>[</u></b>	A.5.40	(81,154)
2008-09	<b>√</b> 161	10.625	1,710.6	\$,	84.61	s	144,734	A.5.	109	9	32	150	1 7	143	5.14	735.0	s .	74.90	\$ 55.052	A.5.40	\$ (89,682)
		•		,	₩	_							.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		<b>V</b> 5121	755.0	1 ` `	, , ,,,,,	Ψ 33,032		(65,502)
Total	660		7,012.5			\$	503,769		485	64	87	636	25	611		3,140.5			\$ 218,013		\$ (285,756)
A5.PS A.5.38																					

				£			
	(	Claimed		Audited	D	ifference	
2005-06	\$	97,325	\$	<u>A.5.38</u> 54,758	\$	(42,567)	▲ A.5.40
2006-07		155,019		37,601		(117,418)	<b>▲</b> A.5.40
2007-08		128,560		70,602		(57,958)	A.5.40
2008-09	L	96,252		55,052		(41,200)	<b>■</b> A.5.40
 Total	\$	477,156	s	,218.013	\$	(259,143)	

**X** A.6.5

( prior to revising after draft report)



A,5.44
p.1/2

#### **Reimbursable Criteria for this component:**

Allowable traini	nσ

Train staff on implementing the reimbursable activities.

One time activity for each employee.

	One time act	ivity f	or each ei	nploy	ee.								•
		Clain	ed Infor	natior				Audito	r's Anal	ysis			
Fiscal Year	Α		В		C	D		E		F		G	
and	Hours		PHR	S	al and Ben	Allowed	Α	llowed	A	llowed		Audit	
Employee Name, Class	Claimed	C	laimed		Claimed	Hours		PHR	Sal	and Ben	Adj	ustments	
					(A * B)				(	(D*E)	(	(F-C)	Comments
B.2.3 FY 2005-06			-				<b>K</b> G.	1.4					
Ahle, Stephen, Principal	4.00	\$	73.27	\$	293.08	4.00	\$	73.27	\$	293	\$	_	
Chrisman, Karl, Principal	4.00		69.79		279.16	4.00		69.79		279		-	
DeAnda, Jose, Principal	3.00		73.27		219.81	3.00		73.27		220		-	
Devich, Robert, Principal	4.00		69.79		279.16	4.00		69.79		279		-	
Maddox, Sheila, Principal	3.00		69.79		209.37	3.00		69.79		209		-	
Milikin, Carolyn, Principal	3.00		73.27		219.81	3.00		73.27		220		-	
Tubbs, Richard, Asst. Princ	3.00		54.61		163.83	3.00	-	54.61		164		<del>-</del>	•
Watson, Margaret, Principal	8.00	\$	66.14		529.12	8.00	\$	66.14		529		<u> </u>	
Subtotal				\$	2,193.00				\$	2,193	\$	_	
										<b>▲</b> A.5.	.40		•
B.2.3							<b>™</b> G.	4.2			,		
<u>FY 2006-07</u>													
Adams, Gwen, Assist Principal	7.50	\$	60.21	\$	451.58	7.50	\$	60.21	\$	452	\$	-	
Armstrong, Tressie, Principal	3.00		56.80		170.40	3.00		56.80		170		-	
DeAnda, Jose, Principal	1.00		76.21		76.21	-		76.21		-		(76)	Claimed in FY 2005-06
Holley, Keith, Director	2.00		76.21		152.42	2.00		76.21		152		-	
Milikin, Carolyn, Principal	1.50		76.21		114.32	-		76.21		-		(114)	Claimed in FY 2005-06
Norton, Torrie, Assist Superintendent	19.00	_	94.20		1,789.80	19.00	_	94.20		1,790		-	
Trogden, Erik, Principal	3.00	\$	70.24	_	210.72	3.00	\$	<b>√</b> 70.24		211		- (1.0.0)	
Subtotal					2,965.00					2,775		(190)	
										<b>▲</b> A.5.4	<u>40</u>		
B.2.3 FY 2007-08							<b>X</b> G.:	1.1					
Armstrong, Theresa, Principal	1.50	\$	60.76	\$	91.14	<u>-</u>	\$	60.76	\$	_	\$	(91)	Claimed in FY 2006-07
Bloomquist, Tom, Assist Principal	3.50	*	69.93	*	244.76	3.50	•	69.93	Ψ	245	*	-	
Giordani, Marjorie, Assist Principal*	3.50		63.55		222,43	3.50		63.55		222		_	
Hancock, Catina, Principal	1.50		65.93		98.90	1.50		65.93		99		_	
,	-							1					



A.5.44 p.2/2

#### **Reimbursable Criteria for this component:**

Allowable training

Train staff on implementing the reimbursable activities.

One time activity for each employee.

	One time act	Claimed Infor	· · · · · · · · · · · · · · · · · · ·		Audito	r's Analysis		
Fiscal Year	A	В	C	D	Е	F	G	
and	Hours	PHR	Sal and Ben	Allowed	Allowed	Allowed	Audit	
Employee Name, Class	Claimed	Claimed	Claimed	Hours	PHR	Sal and Ben	Adjustments	
			(A * B)			(D*E)	(F-C)	Comments
Howard, Tina, Assist Principal	1.50	63.55	95.33	1.50	63.55	95	_	
Huesing, Kimberly Ann, Principal*	1.50	71.89	107.84	1.50	71.89	108	_	
Kalk, Dave, Assist Principal	1.50	58.15	87.23	1.50	58.15	87	_	
Lord, Bill, Assist Principal	3.50	66.60	233.10	3.50	66.60	233	_	
Lund, Chad, Assist Principal*	1.50	63.55	95.33	1.50	63.55	95	_	
Morales, Julio Cesar, Assist Principal	1.50	58.15	87.23	1.50	58.15	87	_	
Sester, Phylis, Admin Assistant	2.00	27.66	55.32	2.00	27.66	55	_	
Sims, Cynthia, Admin Assistant	2.00	27.66	55.32	2.00	27.66	55	_	
Smith, Emily, Admin Assistant	2.00	26.34	52.68	2.00	26.34	53	-	
Vodicka, Devin, Director	1.50	\$ 75.36	113.04	1.50	\$ \ 75.36	113	-	
Subtotal			\$ 1,640.00		<b>Y</b>	\$ 1,549	\$ (91)	
						<b>≥</b> A.5.4		
B.2.3						A.J.		
FY 2008-09			7		<b>S</b> G.1.2			
Bloomquist, Tom, Assist Principal	1.50	\$ 75.31	\$ 112.97	-	\$ 75.31	\$ -	\$ (113)	Claimed in FY 2007-08
Giordani, Marjorie, Assist Principal	1.50	67.98	101.97	-	67.98	-	(102)	Claimed in FY 2007-08
Kalk, Dave, Assist Prinicpal	1.00	64.41	64.41	-	64.41	-	(64)	Claimed in FY 2007-08
Lord, Bill, Assist Principal	1.50	71.73	107.60	-	71.73	-	(108)	Claimed in FY 2007-08
Millikin, Carolyn, Principal	1.00	79.28	79.28	-	79.28	-	(79)	Claimed in FY 2005-06
Morales, J. Cesar, Assist Principal	2.00	\$ 71.01	142.02	-	\$ <b>√</b> 71.01		(142)	Claimed in FY 2007-08
Subtotal			\$ 608.00		٠	\$ -	\$ (608)	
						<b>≤</b> A.5.40	2	
TOTAL			\$ 7,406	A5.PS		\$ 6,517	(889)	A5.PS
						<b>≇</b> A5.P		
* Unable to verify PHR claimed.								ı
Chaolo to folily I file claimed.							1 00	soine cost

training cost adjustment

**Carlsbad Unified School District** 

A6.PS

A.5.39

The Stull Act

**Indirect Costs Summary - Revisions to the Draft Audit Report** July 1, 2005, through June 30, 2009

S10-MCC-039

	<u>Befo</u>	Before receipt of additional documentation									
Fiscal Year	'	ual Costs Claimed		llowable er Audit	Audit Adjustments						
2005-06	\$	5,674	\$	3,320	\$	(2,354)					
2006-07		10,237		2,616		(7,621)					
2007-08		6,302		3,492		(2,810)					
2008-09		5,986		3,402		(2,584)					
Total	\$	28,199	\$	12,830	\$	(15,369)					

Afte	r receipt of	add	itional do	ocumentation					
1	ual Costs		lowable		Audit				
⊢ــٰ	Claimed	pe	r Audit	. <u>A0</u>	ljustments		Diffe	rence	
\$	5,674	\$	3,281	A.6.6	(2,393)		\$	(39)	
	10,237		2,639	<b>▲</b> A.6.6	(7,598)			23	
	6,302		3,492	A.6.6	(2,810)			-	
	5,986		3,498	<b>▲</b> A.6.6	(2,488)			96	
\$	28,199	\$	12,910	\$	(15,289)	5	\$	80	
					A.6.7	] /		Ø A	6.PS
						V		8	A2PS
				(	Indi	rect	<del>-</del>		
					Co	13/2			
					Ardi Co A	djus	fru	ent	

A.G.G.

#### Tab 6

Carlsbad Unified School District The Stull Act Average Hours July 1, 2005, through June 30, 2009 S10-MCC-039



A.5.35 page 1/1

	Evaluation Categories	Time Study Minutes	Audited Allowable Minutes	Unallowable Minutes
A1.	Preparing before training or planning meetings/conferences.		-	(1,455)
<b>A2.</b>	Time spent training or in planning meetings/conferences.	2,562	-	(2,562)
<b>A3.</b>	Preparing/organizing notes from training or planning meetings/conferences.	1,065	-	(1,065)
<b>B4</b> .	Time spent preparing before meeting with teachers.	2,750	-	(2,750)
B5.	Time spent in actual conference with teachers.	5,004	-	(5,004)
B6.	Time spent preparing or organizing notes from meetings with teachers.	1,692	-	(1,692)
C7.	Time spent preparing before "Pre-Observation" conferences with teachers.	1,440	-	(1,440)
C8.	Time spent conducting "Pre-Observation" conference with teachers.	6,650	·	(6,650)
C9.	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.	1,070	_	(1,070)
D10.	-F	3,650	_	(3,650)
	Time spent in "informal" classroom observations.	30,695	30,695	-
D12.	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.	17,580	17,580	-
	Preparing/organizing notes from classroom observations, finalizing Collect Data forms.	7,800	•	(7,800)
E14.	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.	3,650	-	(3,650)
	Time spent preparing before "Post-Observation" conference with teachers.	2,750	-	(2,750)
F16.	Time spent conducting "Post-Observation" conference with teachers.	8,590	_	(8,590)
F17.	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.	1,140	-	(1,140)
	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	8,480	8,480	-
	Time spent preparing before Final Evaluation conferences with teachers.	2,955	-	(2,955)
	Time spent conducting Final Evaluation conferences with teachers.	4,245	-	(4,245)
H21.	Time spent preparing/organizing notes from Final Evaluation conferences with teachers.	610	_	(610)
122.	Discussing the STAR results, with teachers, and how to improve instructional abilities.	1,467	-	(1,467)
	Total time in minutes	√117,300	56,755	(60,545)
	Total time in hours (Total time in minutes . 60)	1,955	946	(1,009)
	Divided by number of evaluations in FY 2010-11	184	184	184
	Average Hours per evaluation	10.625	5.14	(5.48)
		A.5.38	N A	5.38

### <u>A.5.PS</u>

# Schedule A-2 Carlsbad Unified School District 498/83 The Stull Act - Teacher Evaluations (July 2010 to June 2011 Time Study Cycle) Time Conversion - Minutes to Hours

A.5,18 page 1/13

	·		AV	erage fir	ne per	Evaluat	ion			,				1 .	
Act Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Sheet Code
A1	Ahle, Steve	Principal	Poinsettia ES	Х	Х	60			75		٠	25	40	200	A1
A1	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	Х								300	300	A1
A1	Hartman, Jane	Principal	Jefferson ES	х	X	240				45	50	40	30	405	A1
A1	Hines, Jimmy	Principal	Magnolia ES	х	х					70			65	135	A1
A1	Holley, Keith	Director	CVA/CSA	х	х	45	70	105			30			250	A1
A1	Huesing, Kimberly	Principal	Aviara Oaks ES	×	х				30	75	30			135	A1
A1	Lord, Bill	Asst. Principal	Carlsbad High	х	х						30			30	A1
														1,455	A1 Total
A2	Ahle, Steve	Principal	Poinsettia ES	х	х	82			205			65	70	422	A2
A2	Coelho, Megan	Interim Principal	Aviara Oaks MS	X	Х								240	240	A2
A2	Devich, Robert	Principal	Pacific Rim ES	х	х	30			30	30	30	30	30	180	A2
A2	Hartman, Jane	Principal	Jefferson ES	х	х	180				75	135	80		470	- A2
A2	Hines, Jimmy	Principal	Magnolia ES	х	Х	50				60				110	A2
A2	Holley, Keith	Director	CVA/CSA	х	Х	30	90	75						195	A2
A2	Huesing, Kimberly	Principal	Aviara Oaks ES	х	Х				135	345	270	150		900	A2
A2	Morales, J. Cesar	Principal	Valley MS	х	Х	30								30	A2
A2	Stanchi, Margaret	Principal	Carlsbad High	х	X						15			15	A2
														2,562	A2 Total
А3	Ahle, Steve	Principal	Poinsettia ES	х	Х	20			35			20	60	135	A3
А3	Coelho, Megan	Interim Principal	Aviara Oaks MS	х	Х								120	120	A3
А3	Devich, Robert	Principal	Pacific Rim ES	х	Х	30			30	30	30	30	30	180	A3
А3	Hartman, Jane	Principal	Jefferson ES	х	Х	60				45	50	40		195	А3
А3	Hines, Jimmy	Principal	Magnolia ES	x	Х	15				20				35	А3
А3	Holley, Keith	Director	CVA/CSA	x	х		30	45			30			105	A3
А3	Huesing, Kimberly	Principal	Aviara Oaks ES	х	х				25	60	90	15	30	220	А3
А3	Lord, Bill	Asst. Principal	Carlsbad High	x	х			15			30			45	А3
А3	Morales, J. Cesar	Principal	Valley MS	х	Х	30								30	A3

A.5.18 p. 2/13

		<u> </u>	740	rage III	ne per	Lvaiuat	1011								•
Act Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Sheet Code
														1,065	A3 Total
B4	Ahle, Steve	Principal	Poinsettia ES			- 11			20	60	4		·	80	B4
В4	Armstrong, Tessie	Principal	Kelly				120							120	В4
B4	Bloomquist, Tom	Asst. Principal	Carlsbad High		60									60	В4
B4	Coelho, Megan	Interim Principal	Aviara Oaks MS										60	60	B4
B4	Devich, Robert	Principal	Pacific Rim ES	60									- 1	60	B4
В4	Giordani, Marjorie	Asst. Principal	Carlsbad High		60									60	B4
B4	Hancock, Catina	Principal	Calavera Hills MS		45	65	55	20						185	В4
B4	Harden, Leslie	Principal	Calavera Hills ES		30	15	60							105	B4
B4	Hartman, Jane	Principal	Jefferson ES							45	30	20	30	125	B4
В4	Hines, Jimmy	Principal	Magnolia ES		540					40	30			610	В4
B4	Holley, Keith	Director	CVA/CSA			60	70	70			30			230	B4
B4	Howard, Tina	Principal	Buena Vista ES			90								90	B4
B4	Huesing, Kimberly	Principal	Aviara Oaks ES		60				30		15			105	B4
B4	Lord, Bill	Asst. Principal	Carlsbad High		60			15						75	B4
В4	Milliken, Carolyn	Principal	Aviara Oaks MS		90	450								540	B4
В4	Morales, J. Cesar	Principal	Valley MS				75							75	B4
B4	Stanchi, Margaret	Principal	Carlsbad High		60		40							100	B4
B4	Tubbs, Richard	Principal	Hope ES	30		15	25							70	B4
														2,750	<b>B4 Total</b>
B5	Ahle, Steve	Principal	Poinsettia ES						220	720				940	B5
B5	Armstrong, Tessie	Principal	Kelly						30					30	B5
B5	Coelho, Megan	Interim Principal	Aviara Oaks MS										480	480	B5
B5	Devich, Robert	Principal	Pacific Rim ES	30	4									34	B5 ·
B5	Hancock, Catina	Principal	Calavera Hills MS		80	20	220	80						400	B5
B5	Harden, Leslie	Principal	Calavera Hills ES		30	15	390						-	435	B5
B5	Hartman, Jane	Principal	Jefferson ES							165	95	60	60	380	B5

A.5.18 p. 3/13

			Ave	erage Tir	ne per	Evaluat	ion								
Act Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Sheet Code
B5	Hines, Jimmy	Principal	Magnolia ES		300					30	35		30	395	B5
B5	Holley, Keith	Director	CVA/CSA			65	210	90			120		*****	485	B5
B5	Howard, Tina	Principal	Buena Vista ES			180								180	B5
B5	Huesing, Kimberly	Principal	Aviara Oaks ES		180				310		60			550	B5
B5	Milliken, Carolyn	Principal	Aviara Oaks MS		60		60							120	B5
B5	Morales, J. Cesar	Principal	Valley MS				375							375	B5
B5	Stanchi, Margaret	Principal	Carlsbad High				80							.80	B5
B5	Tubbs, Richard	Principal	Hope ES	30		20	70							120	B5
												-		5,004	B5 Total
В6	Ahle, Steve	Principal	Poinsettia ES				660		15	40		20		735	В6
В6	Coelho, Megan	Interim Principal	Aviara Oaks MS										60	60	В6
В6	Devich, Robert	Principal	Pacific Rim ES	30	2		·	30						62	В6
В6	Hancock, Catina	Principal	Calavera Hills MS		10	5	55	20						90	B6
В6	Hartman, Jane	Principal	Jefferson ES				270			45	30	20	20	385	В6
В6	Hines, Jimmy	Principal	Magnolia ES			20				20			20	60	В6
В6	Holley, Keith	Director	CVA/CSA			30	30	30			30			120	В6
B6	Huesing, Kimberly	Principal	Aviara Oaks ES		30				40		15		30	115	В6
В6	Morales, J. Cesar	Principal	Valley MS					30						30	В6
В6	Tubbs, Richard	Principal	Hope ES			10	25							35	В6
														1,692	<b>B6 Total</b>
C7	Ahle, Steve	Principal	Poinsettia ES								25			25	С7
<b>C7</b>	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	<b>C7</b>
C7	Giordani, Marjorie	Asst. Principal	Carlsbad High			50								50	C7
C7	Hancock, Catina	Principal	Calavera Hills MS		5									5	C7
C7	Hartman, Jane	Principal	Jefferson ES							60			20	80	<b>C7</b>
C7	Holley, Keith	Director	CVA/CSA				30		90		30			150	C7
C7	Howard, Tina	Principal	Buena Vista ES						15					15	C7

A.5.18 p. 4/13

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Act	Last, First Name	Title	Site	0/10	0/10	10/10	11/10	12/10	1/11	2/11	2/11	4/11	F /11	Takal	Sheet
				8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Code
C7	Huesing, Kimberly	Principal	Aviara Oaks ES								60			60	
C7	Lord, Bill	Asst. Principal	Carlsbad High										30	30	
C7	Stanchi, Margaret	Principal	Carlsbad High			10			40					50	C7
C7	Tubbs, Richard	Principal	Hope ES			10	50		10	5				75	C7
														720	C7 Total
C8	Ahle, Steve	Principal	Poinsettia ES						-	15	50	95	60	220	C8
C8	Armstrong, Tessie	Principal	Kelly						15	15		45		75	C8
C8	Bloomquist, Tom	Asst. Principal	Carlsbad High			40	30							70	C8
C8	Coelho, Megan	Interim Principal	Aviara Oaks MS										60	60	C8
C8	Giordani, Marjorie	Asst. Principal	Carlsbad High			85		20						105	C8
C8	Harden, Leslie	Principal	Calavera Hills ES				20	45						65	C8
C8	Hartman, Jane	Principal	Jefferson ES			900				60			10	970	C8
C8	Hines, Jimmy	Principal	Magnolia ES	30						30				60	C8
C8	Holley, Keith	Director	CVA/CSA			75		20	115		30			240	C8
C8	Howard, Tina	Principal	Buena Vista ES			·	75		55	20	40	15		205	C8
C8	Huesing, Kimberly	Principal	Aviara Oaks ES					30			165			195	C8
C8	Lord, Bill	Asst. Principal	Carlsbad High			90	30	30	45					195	C8
C8	Milliken, Carolyn	Principal	Aviara Oaks MS			30	30	90	30	90	90	30		390	C8
C8	Morales, J. Cesar	Principal	Valley MS									60		60	C8
C8	Stanchi, Margaret	Principal	Carlsbad High			15	40							55	C8
C8	Tubbs, Richard	Principal	Hope ES			30	230		80	20				360	C8
														3,325	C8 Total
C9	Ahle, Steve	Principal	Poinsettia ES								15			15	С9
C9	Coelho, Megan	Interim Principal	Aviara Oaks MS										120	120	С9
C9	Hartman, Jane	Principal	Jefferson ES			120				60			10	190	С9
C9	Holley, Keith	Director	CVA/CSA			25					30			55	С9
C9	Howard, Tina	Principal	Buena Vista ES								5			5	С9

A.S.18 p.5/13

			AVE	rage fir	ne per	Evaluat	ion								
Act Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Sheet Code
С9	Huesing, Kimberly	Principal	Aviara Oaks ES			20					60			80	C9
С9	Stanchi, Margaret	Principal	Carlsbad High			10								10	C9
С9	Tubbs, Richard	Principal	Hope ES			5	35		15	5				60	C9
														535	C9 Total
D10	Bloomquist, Tom	Asst. Principal	Carlsbad High										205	205	D10
D10	Giordani, Marjorie	Asst. Principal	Carlsbad High			60			20	65				145	D10
D10	Hancock, Catina	Principal	Calavera Hills MS	·	5	40	20		40	70	30	40		245	D10
D10	Hines, Jimmy	Principal	Magnolia ES	30							230	110	30	400	D10
D10	Holley, Keith	Director	CVA/CSA					30	60					90	D10
D10	Howard, Tina	Principal	Buena Vista ES		-						10			10	D10
D10	Huesing, Kimberly	Principal	Aviara Oaks ES					120						120	D10
D10	Lord, Bill	Asst. Principal	Carlsbad High									30	60	90	D10
D10	Morales, J. Cesar	Principal	Valley MS		60			-				140		200	D10
D10	Stanchi, Margaret	Principal	Carlsbad High			90				40	105	60		295	D10
D10	Tubbs, Richard	Principal	Hope ES				20		5					25	D10
														1,825	D10 Total
D11	Ahle, Steve	Principal	Poinsettia ES			140	210	120	135	20	125	45	315	1110	D11
D11	Armstrong, Tessie	Principal	Kelly						320	230	290	190	195	1225	D11
D11	Bloomquist, Tom	Asst. Principal	Carlsbad High	90		30	115	60	185	65	285	265		1095	D11
D11	Coelho, Megan	Interim Principal	Aviara Oaks MS										960	960	D11
D11	Devich, Robert	Principal	Pacific Rim ES		44	60		12	60	60	60	60	60	416	D11
D11	Giordani, Marjorie	Asst. Principal	Carlsbad High			190	120	50	240	240	90	30		960	D11
D11	Hancock, Catina	Principal	Calavera Hills MS	340	2580				180					3100	D11
D11	Harden, Leslie	Principal	Calavera Hills ES	120	95	420	60	90						785	D11
D11	Hartman, Jane	Principal	Jefferson ES							150			60	210	D11
D11	Hines, Jimmy	Principal	Magnolia ES							60		70	150	280	D11
D11	Holley, Keith	Director	CVA/CSA		465	160	370	380	140	315	300	330		2460	D11

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Act														_	Sheet
	Last, First Name	Title	Site	8/10		10/10	11/10	12/10	_	2/11	3/11	4/11	5/11	Total	Code
	Howard, Tina	Principal	Buena Vista ES		300				40					340	D11
D11	Huesing, Kimberly	Principal	Aviara Oaks ES	1400	545	1480		835	905	630	825	1070	1050	8740	D11
D11	Lord, Bill	Asst. Principal	Carlsbad High	105		15		30	300	510	30	60	60	1110	D11
D11	Milliken, Carolyn	Principal	Aviara Oaks MS	120	120	20	165	85	375	80	350	90		1405	D11
D11	Morales, J. Cesar	Principal	Valley MS		24	60	276	12	230	80	80	120		882	D11
D11	Stanchi, Margaret	Principal	Carlsbad High	90	30	60	180	260	115	60	155	180		1130	D11
D11	Tubbs, Richard	Principal	Hope ES	210	505	343	164	446	585	640	693	461	440	4487	D11
														30,695	D11 Total
D12	Ahle, Steve	Principal	Poinsettia ES							35	135	140	165	475	D12
D12	Armstrong, Tessie	Principal	Kelly						45	45		405		495	D12
D12	Bloomquist, Tom	Asst. Principal	Carlsbad High			225	180	45	85	250	45			830	D12
D12	Coelho, Megan	Interim Principal	Aviara Oaks MS										240	240	D12
D12	Giordani, Marjorie	Asst. Principal	Carlsbad High			400	90	70		60	210			830	D12
D12	Hancock, Catina	Principal	Calavera Hills MS		40	180	90			315	135	180		940	D12
D12	Harden, Leslie	Principal	Calavera Hills ES				120	165	,					285	D12
D12	Hartman, Jane	Principal	Jefferson ES										10	10	D12
D12	Holley, Keith	Director	CVA/CSA			165	80	60	150	100	180			735	D12
D12	Howard, Tina	Principal	Buena Vista ES				300		135	40	80	30		585	D12
D12	Huesing, Kimberly	Principal	Aviara Oaks ES						60		375	120		555	D12
D12	Lord, Bill	Asst. Principal	Carlsbad High			120	180		420		120		105	945	D12
D12	Milliken, Carolyn	Principal	Aviara Oaks MS			40	40	75	35	90	180	60		520	D12
D12	Morales, J. Cesar	Principal	Valley MS							210				210	D12
D12	Stanchi, Margaret	Principal	Carlsbad High			50	180		120	225			60	635	D12
D12	Tubbs, Richard	Principal	Hope ES				330		110	60				500	D12
									*					8,790	D12 Total
D13	Ahle, Steve	Principal	Poinsettia ES							10		20		30	D13
D13	Armstrong, Tessie	Principal	Kelly						30					30	D13

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	T		AVC	rage III	ne per	Lvaiuat	1011								
Act Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Sheet Code
D13	Bloomquist, Tom	Asst. Principal	Carlsbad High						-		10	,	-	10	D13
D13	Coelho, Megan	Interim Principal	Aviara Oaks MS										300	300	D13
D13	Giordani, Marjorie	Asst. Principal	Carlsbad High	45		130		10		40	120			345	D13
D13	Hancock, Catina	Principal	Calavera Hills MS			100	20		40	80	30	40		310	D13
D13	Harden, Leslie	Principal	Calavera Hills ES	30	35		5							70	D13
D13	Hartman, Jane	Principal	Jefferson ES							60			10	70	D13
D13	Holley, Keith	Director	CVA/CSA				20	30	40		30	60		180	D13
D13	Howard, Tina	Principal	Buena Vista ES						5	10	20			35	D13
D13	Huesing, Kimberly	Principal	Aviara Oaks ES				1620		15				65	1700	D13
D13	Lord, Bill	Asst. Principal	Carlsbad High						90		60		15	165	D13
D13	Milliken, Carolyn	Principal	Aviara Oaks MS			30		125	60		90			305	D13
D13	Morales, J. Cesar	Principal	Valley MS	-					130	80				210	D13
D13	Stanchi, Margaret	Principal	Carlsbad High		'	80			20				15	115	D13
D13	Tubbs, Richard	Principal	Hope ES				20		5					25	D13
														3,900	D13 Total
E14	Armstrong, Tessie	Principal	Kelly						30	30				60	E14
E14	Bloomquist, Tom	Asst. Principal	Carlsbad High									30		30	E14
E14	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	E14
E14	Giordani, Marjorie	Asst. Principal	Carlsbad High			300		40		180	60	30		610	E14
E14	Hancock, Catina	Principal	Calavera Hills MS					60	30					90	E14
E14	Harden, Leslie	Principal	Calavera Hills ES				15	15						30	E14
	Hartman, Jane	Principal	Jefferson ES										10	10	E14
E14	Hines, Jimmy	Principal	Magnolia ES										60	60	E14
	Huesing, Kimberly	Principal	Aviara Oaks ES					40			15		155	210	E14
	Lord, Bill	Asst. Principal	Carlsbad High								120		120	240	E14
	Milliken, Carolyn	Principal	Aviara Oaks MS						135			30		165	E14
E14	Morales, J. Cesar	Principal	Valley MS			•					50			50	E14

## Schedule A-2 Carlsbad Unified School District 498/83 The Stull Act - Teacher Evaluations (July 2010 to June 2011 Time Study Cycle)

Time Conversion - Minutes to Hours

	5.18
P.	8/13

	Τ			rage III	ne per	Evaluat	1011							·····	·
Act Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Sheet Code
E14	Tubbs, Richard	Principal	Hope ES				90		-					90	E14
														1,825	E14 Total
F15	Ahle, Steve	Principal	Poinsettia ES							20	20			40	F15
F15	Bloomquist, Tom	Asst. Principal	Carlsbad High			20	20				10	60		110	F15
F15	Coelho, Megan	Interim Principal	Aviara Oaks MS				***						240	240	F15
F15	Giordani, Marjorie	Asst. Principal	Carlsbad High				60		30	20				110	F15
F15	Hancock, Catina	Principal	Calavera Hills MS		10	20	10			40	20	20		120	F15
F15	Hartman, Jane	Principal	Jefferson ES							60			10	70	F15
F15	Holley, Keith	Director	CVA/CSA				30	30						60	F15
F15	Howard, Tina	Principal	Buena Vista ES						40					40	F15
F15	Huesing, Kimberly	Principal	Aviara Oaks ES					20			15	45	15	95	F15
F15	Lord, Bill	Asst. Principal	Carlsbad High								60			60	F15
F15	Milliken, Carolyn	Principal	Aviara Oaks MS			30		110	50	,	120		·	310	F15
F15	Stanchi, Margaret	Principal	Carlsbad High	-		15	20							35	F15
F15	Tubbs, Richard	Principal	Hope ES				30	10	20	25				85	F15
														1,375	F15 Total
F16	Ahle, Steve	Principal	Poinsettia ES								110	135		245	F16
F16	Armstrong, Tessie	Principal	Kelly	,					30	30		180		240	F16
F16	Bloomquist, Tom	Asst. Principal	Carlsbad High			40	40		30	50			45	205	F16
F16	Coelho, Megan	Interim Principal	Aviara Oaks MS										540	540	F16
F16	Giordani, Marjorie	Asst. Principal	Carlsbad High			30	120	30	30	60	30	20		320	F16
F16	Hancock, Catina	Principal	Calavera Hills MS		25	80	40			160	80	80		465	F16
F16	Harden, Leslie	Principal	Calavera Hills ES				20	150						170	F16
F16	Hartman, Jane	Principal	Jefferson ES							60			20	80	F16
F16	Holley, Keith	Director	CVA/CSA				45	30	60		30	,		165	F16
F16	Howard, Tina	Principal	Buena Vista ES		15		135		60	30	30	15		285	F16
F16	Huesing, Kimberly	Principal	Aviara Oaks ES					50			30	45	40	165	F16

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Act Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Sheet Code
F16	Lord, Bill	Asst. Principal	Carlsbad High			30		30	135				150	345	F16
F16	Milliken, Carolyn	Principal	Aviara Oaks MS								90	30		120	F16
F16	Morales, J. Cesar	Principal	Valley MS							90		30	40	160	F16
F16	Stanchi, Margaret	Principal	Carlsbad High			35	60		40		125	80		340	F16
F16	Tubbs, Richard	Principal	Hope ES				270	60	60	60				450	F16
														4,295	F16 Total
F17	Ahle, Steve	Principal	Poinsettia ES								20	10		30	F17
F17	Giordani, Marjorie	Asst. Principal	Carlsbad High						30			30		60	F17
F17	Hancock, Catina	Principal	Calavera Hills MS		5	20	10			40	20	25		120	F17
F17	Hartman, Jane	Principal	Jefferson ES							60			10	70	F17
F17	Howard, Tina	Principal	Buena Vista ES				15		30	20	10			75	F17
F17	Huesing, Kimberly	Principal	Aviara Oaks ES					20			15	45	5	85	F17
F17	Lord, Bill	Asst. Principal	Carlsbad High					30						30	F17
F17	Stanchi, Margaret	Principal	Carlsbad High			10								10	F17
F17	Tubbs, Richard	Principal	Hope ES				45	10	20	15				90	F17
														570	F17 Total
G18	Ahle, Steve	Principal	Poinsettia ES		80								900	980	G18
G18	Armstrong, Tessie	Principal	Kelly										330	330	G18
G18	Bloomquist, Tom	Asst. Principal	Carlsbad High	,					45			30	180	255	G18
G18	Coelho, Megan	Interim Principal	Aviara Oaks MS		-								240	240	G18
G18	Giordani, Marjorie	Asst. Principal	Carlsbad High							60	30	60	480	630	G18
G18	Hancock, Catina	Principal	Calavera Hills MS						45			2040		2085	G18
G18	Hartman, Jane	Principal	Jefferson ES										60	60	G18
G18	Hines, Jimmy	Principal	Magnolia ES										120	120	G18
G18	Holley, Keith	Director	CVA/CSA									880	390	1270	G18
G18	Howard, Tina	Principal	Buena Vista ES			,				110	70		540	720	G18
G18	Huesing, Kimberly	Principal	Aviara Oaks ES										120	120	G18

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			1	T	per	Evaluat		1							
Act				E									,		Sheet
Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Code
G18	Lord, Bill	Asst. Principal	Carlsbad High						60					60	G18
G18	Milliken, Carolyn	Principal	Aviara Oaks MS									180		180	G18
G18	Morales, J. Cesar	Principal	Valley MS										180	180	G18
G18	Stanchi, Margaret	Principal	Carlsbad High							180	120	60		360	G18
G18	Tubbs, Richard	Principal	Hope ES										890	890	G18
														8,480	G18 Total
H19	Ahle, Steve	Principal	Poinsettia ES		20								1195	1215	H19
H19	Armstrong, Tessie	Principal	Kelly										330	330	H19
H19	Coelho, Megan	Interim Principal	Aviara Oaks MS										60	60	H19
H19	Giordani, Marjorie	Asst. Principal	Carlsbad High								40		60	100	H19
H19	Hancock, Catina	Principal	Calavera Hills MS									25	70	95	H19
H19	Hartman, Jane	Principal	Jefferson ES										60	60	H19
H19	Hines, Jimmy	Principal	Magnolia ES										120	120	H19
H19	Holley, Keith	Director	CVA/CSA									120	120	240	H19
H19	Howard, Tina	Principal	Buena Vista ES										390	390	H19
H19	Huesing, Kimberly	Principal	Aviara Oaks ES										15	15	H19
H19	Lord, Bill	Asst. Principal	Carlsbad High										60	60	H19
H19	Milliken, Carolyn	Principal	Aviara Oaks MS									240		240	H19
H19	Stanchi, Margaret	Principal	Carlsbad High										30	30	H19
								,						2,955	H19 Total
H20	Ahle, Steve	Principal	Poinsettia ES		15								1225	1240	H20
H20	Bloomquist, Tom	Asst. Principal	Carlsbad High										180	180	H20
1	Coelho, Megan	Interim Principal	Aviara Oaks MS										540	540	H20
	Giordani, Marjorie	Asst. Principal	Carlsbad High								60		300	360	H20
H20	Hancock, Catina	Principal	Calavera Hills MS									75	195	270	H20
	Hartman, Jane	Principal	Jefferson ES										120	120	H20
H20	Hines, Jimmy	Principal	Magnolia ES										120	120	H20

#### Schedule A-2 Carlsbad Unified School District 498/83 The Stull Act - Teacher Evaluations (July 2010 to June 2011 Time Study Cycle)

A.5.18 P.11/13

Time Conversion - Minutes to Hours
Average Time per Evaluation

			AVE	erage IIr	ne per	Evaluat	ion								1
Act Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Sheet Code
H20	Holley, Keith	Director	CVA/CSA				,	-	-		-	105	240	345	H20
H20	Huesing, Kimberly	Principal	Aviara Oaks ES										10	10	H20
H20	Lord, Bill	Asst. Principal	Carlsbad High										120	120	H20
H20	Milliken, Carolyn	Principal	Aviara Oaks MS						160			300		460	H20
H20	Stanchi, Margaret	Principal	Carlsbad High								40	20	40	100	H20
H20	Tubbs, Richard	Principal	Hope ES										380	380	H20
														4,245	H20 Total
H21	Ahle, Steve	Principal	Poinsettia ES		30								175	205	H21
H21	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	H21
H21	Hancock, Catina	Principal	Calavera Hills MS									25	70	95	H21
H21	Hartman, Jane	Principal	Jefferson ES										60	60	H21
H21	Holley, Keith	Director	CVA/CSA									60		60	H21
H21	Huesing, Kimberly	Principal	Aviara Oaks ES										10	10	H21
														610	<b>H21</b> Total
122	Ahle, Steve	Principal	Poinsettia ES						200					200	122
122	Armstrong, Tessie	Principal	Kelly		60									60	122
122	Bloomquist, Tom	Asst. Principal	Carlsbad High	30										30	122
122	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	122
122	Devich, Robert	Principal	Pacific Rim ES	30	2									32	122
122	Giordani, Marjorie	Asst. Principal	Carlsbad High								10			10	122
122	Hancock, Catina	Principal	Calavera Hills MS		65									65	122
122	Harden, Leslie	Principal	Calavera Hills ES	30	45	30								105	122
122	Hines, Jimmy	Principal	Magnolia ES			25					40			65	122
122	Howard, Tina	Principal	Buena Vista ES	120	120						120			360	122
122	Huesing, Kimberly	Principal	Aviara Oaks ES		60									60	122
122	Lord, Bill	Asst. Principal	Carlsbad High	30								120		150	122
122	Morales, J. Cesar	Principal	Valley MS		90									90	122

#### Schedule A-2

#### **Carlsbad Unified School District**

498/83 The Stull Act - Teacher Evaluations

(July 2010 to June 2011 Time Study Cycle)

Time Conversion - Minutes to Hours

Average Time per Evaluation

A.	5,	18
P	, <i>12</i>	/13

			746	age III	ne per	Lvaiuat	1011								
Act						. :									Sheet
Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Code
122	Stanchi, Margaret	Principal	Carlsbad High	30	30									60	122

1,467 I22 Total

			90,140 ^G	
				<u>A</u> .
*SCO Code	A.1.	A1	1,455	1,455
11	A.1.	A2	2,562	2,562
11	A.1.	A3	1,065	1,065
11	A.1.	B4	2,750	2,750
11	A.1.	B5	5,004	5,004
11	A.1.	В6	1,692	1,692
11	A.1.	C7	720	1,440
11	A.1.	C8	3,325	6,650
11	A.1.	C9	535	1,070
11	A.1.	D10	1,825	3,650
11	A.1.	D11	30,695	30,695
11	A.1.	D12	8,790	17,580
11	A.1.	D13	3,900	7,800
11	A.1.	E14	1,825	3,650
11	A.1.	F15	1,375	2,750
11	A.1.	F16	4,295	8,590
11	A.1.	F17	570	1,140
11	A.1.	G18	8,480	8,480
11	A.1.	H19	2,955	2,955
11	A.1.	H20	4,245	4,245
11	A.1.	H21	610	610
	A.2.	122	1,467	1,467
			90,140	117,300

#### Schedule A-2

#### **Carlsbad Unified School District**

498/83 The Stull Act - Teacher Evaluations

(July 2010 to June 2011 Time Study Cycle)

Time Conversion - Minutes to Hours

Average Time per Evaluation

A.S. 18
p. 13/13

Act															Sheet
Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Code
			SCO Code A.1. Total:	1	15,833						Tot	al Code	A.1. (n	ninutes)	115,833
			SCO Code A.2. Total:		1,467					•	T	otal Co	de A.1.	(hours)	1,930.6
				1	17,300		1	Numbe	r of Eva	luation	s in 20	10/11 (	SA 1.8 I	Line 2D)	184
•									Avera	age Ho	urs per	Evaluat	ion - Co	ode A.1.	10.492
											Tot	al Code	A.2. (n	ninutes)	1,467
											Т	otal Co	de A.2.	(hours)	24.5
*From	The Stull Act (98-TC-	25) Parameters a	ind Guidelines				I	Numbe	r of Eva	luation	s in 20	10/11 (	SA 1.8 l	ine 2D)	184
									Avera	age Ho	urs per	Evaluat	ion - Co	ode A.2.	0.133

Act				1										1	She	neet
	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	1	ode Activity
	Ahle, Steve	Principal	Poinsettia ES	x	X	66		12,20	75	_	5,22	25	_			
	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	x	1	<del> </del>	<del> </del>					300			
A1	Hartman, Jane	Principal	Jefferson ES	х	x	248		<del> </del>		45	50	46	_			
A1	Hines, Jimmy	Principal	Magnolia ES	X	×					79			6:			The state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the s
	Holley, Keith	Director	CVA/CSA	x	×	45	76	105			38			250	+	
	Huesing, Kimberly	Principal	Aviara Oaks ES	×	x			100	30	75	38			135		
	Lord, Bill	Asst. Principal	Carlsbad High	x	×	<del>                                     </del>		· ·			30			30	_	
	2014, 511	7.03c. i rincipui	Carisbaa riigir	†-^-	<del> ^-</del> -	†									AI Co	
A2	Ahle, Steve	Principal	Poinsettia ES	х	х	82			205			65	76			
	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	×	1							246			
	Devich, Robert	Principal	Pacific Rim ES	×	×	30			38	38	30	36	_			
	Hartman, Jane	Principal	Jefferson ES	x	x	180	<del></del>	<del>                                     </del>		75		86		470	<del></del>	, , , , , , , , , , , , , , , , , , , ,
	Hines, Jimmy	Principal	Magnolia ES	x	X	58		<del> </del>		60				110	<del></del>	
	Holley, Keith	Director	CVA/CSA	x	x	30		75						195		
	Huesing, Kimberly	Principal	Aviara Oaks ES	x	x			1	135	345	270	156		900		, , , , , , , , , , , , , , , , , , , ,
	Morales, J. Cesar	Principal	Valley MS	×	×	30								30		' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' '
_	Stanchi, Margaret	Principal	Carlsbad High	x	×						15			15		
,	Station, Margaret	Timespai	Carisbad Filgir	<u> </u>											A2 To	
А3	Ahle, Steve	Principal	Poinsettia ES	x	x	28			35			26	66		_	AND AND AND AND AND AND AND AND AND AND
	Coelho, Megan	Interim Principal	Aviara Oaks MS	×	×								126	<u> </u>	A3	, <u> </u>
	Devich, Robert	Principal	Pacific Rim ES	X	x	38			38	38	38	36			A3	
	Hartman, Jane	Principal	Jefferson ES	x	x	60				45	58	48	+	195	A3	
$\overline{}$	Hines, Jimmy	Principal	Magnolia ES	x	x	15				20			<del> </del>	35	A3	<u> </u>
_	Holley, Keith	Director	CVA/CSA	×	×	1.0	38	45		20	30			105	A3	
	Huesing, Kimberly	Principal	Aviara Oaks ES	x	x			10	25	68	90	15	36		A3	1 0 0 0 1 0 0
	Lord, Bill	Asst. Principal	Carlsbad High	×	×			15			30			45	A3	, , , , , , , , , , , , , , , , , , , ,
	Morales, J. Cesar	Principal	Valley MS	x	×	30		10			30			30	A3	
7.5	iviorales, J. Cesai	rinicipal	Valley IVIS	<u>  ^                                   </u>		30									A3 Col	
B4	Ahle, Steve	Principal	Poinsettia ES			1			20	60				80	B4	
	Armstrong, Tessie	Principal	Kelly	· · · · · · · · · · · · · · · · · · ·			120		- 20	- 00				120	B4	
	Bloomquist, Tom	Asst. Principal	Carlsbad High		60		120							60		
	Coelho, Megan	Interim Principal	Aviara Oaks MS		- 60								60		B4	
	Devich, Robert	Principal	Pacific Rim ES	60										60	84	
	Giordani, Marjorie	Asst. Principal	Carlsbad High	- 00	60									60	B4	
	Hancock, Catina	Principal	Calavera Hills MS	-	45		55	20						185	B4	
	Harden, Leslie	·····	Calavera Hills ES		30									105	B4	, , , , ,
	Hartman, Jane	Principal Principal	Jefferson ES		30	13	90			45	30	20	30		84 84	
	· · · · · · · · · · · · · · · · · · ·	<u> </u>	<del></del>	$\vdash$	540	<del> </del>	<del> </del>			45	30	20	30	610	84 84	
	Hines, Jimmy	Principal	Magnolia ES		540	<del></del>	70	70		40	30			230	B4	
_	Holley, Keith	Director	CVA/CSA			60 90		/0			30			90	84 B4	
$\overline{}$	Howard, Tina	Principal	Buena Vista ES		60				20		1 5		<u> </u>			
	Huesing, Kimberly	Principal	Aviara Oaks ES	ļ	60			15	30		15		<del> </del>	105 75	B4 B4	
	Lord, Bill	Asst. Principal	Carlsbad High					15								
	Milliken, Carolyn	Principal	Aviara Oaks MS		90	450								540	B4	
	Morales, J. Cesar	Principal	Valley MS				75							75	B4	
	Stanchi, Margaret	Principal	Carlsbad High		60	_	40							100	B4	
B4 1	Tubbs, Richard	Principal	Hope ES	30		15	25	<b>-</b>					<b></b>	70	B4	
			B 1 111 ==						30.0	30.5			<u></u>	2,750		
85 /	Ahle, Steve	Principal	Poinsettia ES						220	720			L	940	B5	Time spent in actual conference with teachers.

Act Code Last, First Name Title Site 8/10 9/10 10/10 11/10 12/10 1/11 2/11 3/11 4/11 5/11 Total Code Activity  B5 Armstrong, Tessie Principal Kelly 30 30 30 B5 Time spent in actual conference with teachers.  B5 Coelho, Megan Interim Principal Aviara Oaks MS 5 Time spent In actual conference with teachers.	
Code Last, First Name Title Site 8/10 9/10 10/10 11/10 12/10 1/11 2/11 3/11 4/11 5/11 Total Code Activity  B5 Armstrong, Tessie Principal Kelly Site 8/10 9/10 10/10 11/10 12/10 1/11 2/11 3/11 4/11 5/11 Total Code Activity  30 B5 Time spent in actual conference with teachers.	
Code Last, First Name Title Site 8/10 9/10 10/10 11/10 12/10 1/11 2/11 3/11 4/11 5/11 Total Code Activity  B5 Armstrong, Tessie Principal Kelly Site 8/10 9/10 10/10 11/10 12/10 1/11 2/11 3/11 4/11 5/11 Total Code Activity  B 30 B Time spent in actual conference with teachers.	
The special restaurance man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conference man conferen	
B5 Coelho, Megan Interim Principal Aviara Oaks MS 480 480 B5 Time spent in actual conference with teachers.	
B5 Devich, Robert Principal Pacific Rim ES 30 4 34 B5 Time spent in actual conference with teachers.	
B5 Hancock, Catina Principal Calavera Hills M5 80 20 220 80 400 B5 Time spent in actual conference with teachers.	****
B5 Harden, Leslie Principal Calavera Hills ES 30 15 390 435 B5 Time spent in actual conference with teachers.	
B5 Hartman, Jane Principal Jefferson ES 165 95 60 60 380 B5 Time spent in actual conference with teachers.	
B5 Hines, Jimmy Principal Magnolia ES 300 30 35 30 395 B5 Time spent in actual conference with teachers.	
B5 Holley, Keith Director CVA/CSA 65 210 90 120 485 B5 Time spent in actual conference with teachers.	
B5 Howard, Tina Principal Buena Vista ES 180 180 85 Time spent in actual conference with teachers.	
B5 Huesing, Kimberly Principal Aviara Oaks ES 180 310 60 550 B5 Time spent in actual conference with teachers.	
B5 Milliken, Carolyn Principal Aviara Oaks MS 60 60 120 B5 Time spent in actual conference with teachers.	
85 Morales, J. Cesar Principal Valley MS 375 375 B5 Time spent in actual conference with teachers.	
B5 Stanchi, Margaret Principal Carlsbad High 80 85 Time spent in actual conference with teachers.	
B5 Tubbs, Richard Principal Hope ES 30 20 70 120 B5 Time spent in actual conference with teachers.	
5,004 BS Total	
B6 Ahle, Steve Principal Poinsettia ES 660 15 40 20 735 B6 Time spent preparing or organizing notes from meetings with t	ensehors
B6 Coelho, Megan Interim Principal Aviara Oaks MS 60 60 B6 Time spent preparing or organizing notes from meetings with t	
B6 Devich, Robert Principal Pacific Rim ES 30 2 30 62 B6 Time spent preparing or organizing notes from meetings with the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the control of the contr	
B6 Hancock, Catina Principal Calavera Hills MS 10 5 55 20 90 B6 Time spent preparing or organizing notes from meetings with to	
B6 Hartman, Jane Principal Jefferson ES 270 45 30 20 20 385 B6 Time spent preparing or organizing notes from meetings with the	
B6 Hines, Jimmy Principal Magnolia ES 20 20 20 60 B6 Time spent preparing or organizing notes from meetings with the	
B6 Holley, Keith Director CVA/CSA 30 30 30 120 B6 Time spent preparing or organizing notes from meetings with the	
B6 Huesing, Kimberly Principal Aviara Oaks ES 30 40 15 30 115 86 Time spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from meetings with the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing or organizing notes from the spent preparing notes from the spent preparing notes from the spent preparing notes from the spent preparing notes from the spent preparing notes from the spent preparing notes from the spent prepa	
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B6 Tubbs, Richard Principal Hope ES 10 25 35 86 Time spent preparing or organizing notes from meetings with to	eachers.
C7 Ahle, Steve Principal Poinsettia ES 25 C7 Time spent preparing <b>before</b> "Pre-Observation" conferences wi	lah Azarah zan
C7 Coelho, Megan Interim Principal Aviara Oaks MS 180 C7 Time spent preparing before "Pre-Observation" conferences will be conferences will be conference to the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of the conference of	
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720 C7 Total	
C8 Ahle, Steve Principal Poinsettia ES 15 50 95 60 220 C8 Time spent conducting "Pre-Observation" conference with teach	
C8 Armstrong, Tessie Principal Kelly 15 15 45 75 C8 Time spent conducting "Pre-Observation" conference with teac	
C8 Bloomquist, Tom Asst. Principal Carlsbad High 40 30 70 C8 Time spent conducting "Pre-Observation" conference with teach	
C8 Coelho, Megan Interim Principal Aviara Oaks MS 60 60 C8 Time spent conducting "Pre-Observation" conference with teach	
C8 Giordani, Marjorie Asst. Principal Carlsbad High 85 20 105 C8 Time spent conducting "Pre-Observation" conference with teach	
C8 Harden, Leslie Principal Calavera Hills ES 20 45 65 C8 Time spent conducting "Pre-Observation" conference with teac	
C8 Hartman, Jane Principal Jefferson ES 900 60 10 970 C8 Time spent conducting "Pre-Observation" conference with teac	
C8 Hines, Jimmy Principal Magnolia ES 30 30 60 C8 Time spent conducting "Pre-Observation" conference with teach	
C8 Holley, Keith Director CVA/CSA 75 20 115 30 240 C8 Time spent conducting "Pre-Observation" conference with teac	hers.
C8 Howard, Tina Principal Buena Vista ES 75 55 20 40 15 205 C8 Time spent conducting "Pre-Observation" conference with teac	hers.

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Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Code	Activity
C8	Huesing, Kimberly	Principal	Aviara Oaks ES					30			165			195	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Lord, Bill	Asst. Principal	Carlsbad High			90	30	30	45					195	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Milliken, Carolyn	Principal	Aviara Oaks MS			30	30	90	30	90	90	30		390	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Morales, J. Cesar	Principal	Valley MS									60		60	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Stanchi, Margaret	Principal	Carlsbad High			15	40							55	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Tubbs, Richard	Principal	Hope ES			30	230		80	20				360	C8	Time spent conducting "Pre-Observation" conference with teachers.
						-								3,325	C8 Total	
C9	Ahle, Steve	Principal	Poinsettia ES								15			15	C9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Coelho, Megan	Interim Principal	Aviara Oaks MS										120	120	С9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Hartman, Jane	Principal	Jefferson ES			120				60			10	190	C9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Holley, Keith	Director	CVA/CSA			25					30			55	С9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Howard, Tina	Principal	Buena Vista ES								5			5	C9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Huesing, Kimberly	Principal	Aviara Oaks ES			20					60			80	C9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Stanchi, Margaret	Principal	Carlsbad High	1		10								10	C9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Tubbs, Richard	Principal	Hope ES			5	35		15	5				60	C9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
														535	C9 Total	
D10	Bloomquist, Tom	Asst. Principal	Carlsbad High										205	205	D10	Time spent preparing <b>before</b> classroom observations of teachers.
D10	Giordani, Marjorie	Asst. Principal	Carlsbad High			60			20	65				145	D10	Time spent preparing <b>before</b> classroom observations of teachers.
D10	Hancock, Catina	Principal	Calavera Hills MS	1	5	40	20		40	70	30	40		245	D10	Time spent preparing <b>before</b> classroom observations of teachers.
D10	Hines, Jimmy	Principal	Magnolia ES	30							230	110	30	400	D10	Time spent preparing before classroom observations of teachers.
D10	Holley, Keith	Director	CVA/CSA					30	60					90	D10	Time spent preparing before classroom observations of teachers.
D10	Howard, Tina	Principal	Buena Vista ES					İ			10			10	D10	Time spent preparing before classroom observations of teachers.
D10	Huesing, Kimberly	Principal	Aviara Oaks ES					120						120	D10	Time spent preparing before classroom observations of teachers.
D10	Lord, Bill	Asst. Principal	Carlsbad High									30	60	90	D10	Time spent preparing before classroom observations of teachers.
D10	Morales, J. Cesar	Principal	Valley MS		60							140		200	D10	Time spent preparing <b>before</b> classroom observations of teachers.
D10	Stanchi, Margaret	Principal	Carlsbad High			90				40	105	60		295	D10	Time spent preparing before classroom observations of teachers.
D10	Tubbs, Richard	Principal	Hope ES	<b> </b>			20		5					25	D10	Time spent preparing before classroom observations of teachers.
		,				1						1			D10 Total	· · · · · · · · · · · · · · · · · · ·
D11	Ahle, Steve	Principal	Poinsettla ES			140	210	120	135	20	125	45	315	1110	D11	Time spent in "informal" classroom observations.
D11	Armstrong, Tessie	Principal	Kelly						320	230	290	190	195	1225	D11	Time spent in "informal" classroom observations.
D11	Bloomquist, Tom	Asst. Principal	Carlsbad High	90		30	115	60	185	65	285	265		1095	D11	Time spent in "informal" classroom observations.
D11	Coelho, Megan	Interim Principal	Aviara Oaks MS										960	960	D11	Time spent in "informal" classroom observations.
D11	Devich, Robert	Principal	Pacific Rim ES		44	60		12	60	60	60	60	60	416	D11	Time spent in "informal" classroom observations.
D11	Giordani, Marjorie	Asst. Principal	Carlsbad High	1		190	120	50	240	240	90	30		960	D11	Time spent in "informal" classroom observations.
D11	Hancock, Catina	Principal	Calavera Hills MS	340	2580				180					3100	D11	Time spent in "informal" classroom observations.
	Harden, Leslie	Principal	Calavera Hills ES	120			60	90						785	D11	Time spent in "informal" classroom observations.
	Hartman, Jane	Principal	Jefferson ES	<u> </u>						150			60		D11	Time spent in "informal" classroom observations.
-	Hines, Jimmy	Principal	Magnolia ES							60		70			D11	Time spent in "informal" classroom observations.
	Holley, Keith	Director	CVA/CSA		465	160	370	380	140	315	300			2460	D11	Time spent in "informal" classroom observations.
	Howard, Tina	Principal	Buena Vista ES		300				40					340	D11	Time spent in "informal" classroom observations.
	Huesing, Kimberly	Principal	Aviara Oaks ES	1400		1480		835		630	825	1070	1050	8740	D11	Time spent in "informal" classroom observations.
	Lord, Bill	Asst. Principal	Carlsbad High	105	343	15		30	300	510	30	60	60	1110	D11	Time spent in "informal" classroom observations.
	Milliken, Carolyn	Principal	Aviara Oaks MS	120	120	-	165	85	375	80	350	90	- 5	1405	D11	Time spent in "Informal" classroom observations.
	Morales, J. Cesar	Principal	Valley MS	120	24				230	80	80			882	D11	Time spent in "informat" classroom observations.
	Stanchi, Margaret	Principal	Carlsbad High	90	30	_	180	260	115	60	155	180		1130	D11	Time spent in "informal" classroom observations.
-	Tubbs, Richard	Principal	Hope ES	210			164	446	585	640	693	461	440	4487	D11	Time spent in "informal" classroom observations.
211	, assa, meratu	i i incipai	, tope Lo	210	303	343	-04	740	202	U-4-U	093	401	770		D11 Total	
D12	Ahle, Steve	Principal	Poinsettía ES							35	135	140	165	475		Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
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Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Code	Activity
D12	Armstrong, Tessie	Principal	Kelly	<del> </del>			<u> </u>		. 45	45	·	405	1	495	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Bloomquist, Tom	Asst. Principal	Carlsbad High			225	180	45	85	250	45			830	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Coelho, Megan	Interim Principal	Aviara Oaks MS										240	240	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Giordani, Marjorie	Asst. Principal	Carlsbad High			400	90	70		60	210			830	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Hancock, Catina	Principal	Calavera Hills MS		40	180	90			315	135	180		940	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Harden, Leslie	Principal	Calavera Hills ES				120	165						285	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Hartman, Jane	Principal	Jefferson ES	1									10	10	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Holley, Keith	Director	CVA/CSA			165	80	60	150	100	180			735	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Howard, Tina	Principal	Buena Vista ES				300		135	40	80	30		585	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Huesing, Kimberly	Principal	Aviara Oaks ES						60		375	120		555	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Lord, Bill	Asst. Principal	Carlsbad High			120	180		420		120		105	945	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Milliken, Carolyn	Principal	Aviara Oaks MS			40	40	75	35	90	180	60		520	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Morales, J. Cesar	Principal	Valley MS							210				210	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Stanchi, Margaret	Principal	Carlsbad High			50	180		120	225		·	60	635	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
D12	Tubbs, Richard	Principal	Hope ES				330		110	60				500	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.
														8,790	D12 Tota	
D13	Ahle, Steve	Principal	Poinsettia ES							10		20		30	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Armstrong, Tessie	Principal	Kelly						30					30	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Bloomquist, Tom	Asst. Principal	Carlsbad High								10			10	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Coelho, Megan	Interim Principal	Aviara Oaks MS										300	300	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Giordani, Marjorie	Asst. Principal	Carlsbad High	45		130		10		40	120			345	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Hancock, Catina	Principal	Calavera Hills MS			100	20		40	80	30	40		310	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Harden, Leslie	Principal	Calavera Hills ES	30	35		5							70	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Hartman, Jane	Principal	Jefferson ES							60			10	70	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Holley, Keith	Director	CVA/CSA				20	30	40		30	60		180	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Howard, Tina	Principal	Buena Vista ES						5	10	20			35	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Huesing, Kimberly	Principal	Aviara Oaks ES				1620		15				65	1700	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Lord, Bill	Asst. Principal	Carlsbad High						90		60		15	165	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Milliken, Carolyn	Principal	Aviara Oaks MS			30		125	60		90			305	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Morales, J. Cesar	Principal	Valley MS						130	80				210	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Stanchi, Margaret	Principal	Carlsbad High			80			20				15	115	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
D13	Tubbs, Richard	Principal	Hope ES				20		5					25	D13	Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
														3,900	D13 Total	
E14	Armstrong, Tessie	Principal	Kelly						30	30				60	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Bloomquist, Tom	Asst. Principal	Carlsbad High									30		30	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Giordani, Marjorle	Asst. Principal	Carlsbad High			300		40		180	60	30		610	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Hancock, Catina	Principal	Calavera Hills MS					60	30					90	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Harden, Leslie	Principal	Calavera Hills ES				15	15						30	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Hartman, Jane	Principal	Jefferson ES										10	10	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Hines, Jimmy	Principal	Magnolia ES										60	60	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Huesing, Kimberly	Principal	Aviara Oaks ES					40			15		155	210	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Lord, Bill	Asst. Principal	Carlsbad High								120		120	240	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Milliken, Carolyn	Principal	Aviara Oaks MS						135			30		165	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Morales, J. Cesar	Principal	Valley MS								50			50	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
E14	Tubbs, Richard	Principal	Hope ES				90							90	E14	Reports on observations, preparing the Standards for Excellence in Teaching observation checklists.
														1,825	E14 Total	
F15	Ahle, Steve	Principal	Poinsettia ES							20	20			40	F15	Time spent preparing before "Post-Observation" conferences with teachers.

Accord   Code   Lat. Pirol Name   Table   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site   Site																	
Code   Lance   February   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   St																	
Code   Lance   February   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   State   St	Act															Sheet	
FIS   Gordon, Margine   Asst. Principal   Calibora Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral Hills   St.   Caliboral H	1	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total		Activity
Fig.   Second, Margine   Ast. Principal   Cultivas Histo   St.   St.   St.   St.   St.   Cultivas Histo   Principal   Lefteron 15   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.	F15	Bloomquist, Tom	Asst. Principal	Carlsbad High			20	20				10	60		110	F15	Time spent preparing before "Post-Observation" conferences with teachers.
15  Startman, Jane   Principal   Afferson 65   1	F15	Coelho, Megan	Interim Principal	Aviara Oaks MS										240	240	F15	Time spent preparing <b>before</b> "Post-Observation" conferences with teachers.
Fig.   Finding American   Principal   Merican Sis	F15	Giordani, Marjorie	Asst. Principal	Carlsbad High				60		30	20				110	F15	Time spent preparing before "Post-Observation" conferences with teachers.
Fig.   Flower, Flower,   Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   Auto-Principal   A	F15	Hancock, Catina	Principal	Calavera Hills MS		10	20	10			40	20	20		120	F15	Time spent preparing before "Post-Observation" conferences with teachers.
Fig.   Severy After   Director   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   Severy After   S	F15	Hartman, Jane	Principal	Jefferson ES							60			10	70	F15	Time spent preparing before "Post-Observation" conferences with teachers.
Fig.   Housing, Trainty   Principal   Autora Color   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.   St.			•					30	30						60	F15	
F15   Standt, Marchy   Principal   Avisar Gales ES		•								40					40	F15	· · · · · · · · · · · · · · · · · · ·
F15   Milkine, Crodyn	F15	Huesing, Kimberly	<del></del>	Aviara Oaks ES					20			15	45	15	95	F15	Time spent preparing <b>before</b> "Post-Observation" conferences with teachers.
Fig.   Submit Markand   Principal   Caribad High   15   20   10   20   25   10   20   25   10   20   25   10   20   25   10   20   25   10   20   25   10   20   25   10   20   25   10   20   25   25   20   20   20   20   2			<u> </u>	Carlsbad High		i						60					
First   Tubbs, Rahard   Principal   September   Principal   September   Principal   September   Principal   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   September   Sept	F15	Milliken, Carolyn	Principal	Aviara Oaks MS			30		110	50		120			310	F15	Time spent preparing <b>before</b> "Post-Observation" conferences with teachers.
First   Tubbs, Richard	_		<del></del>				15	20								F15	
Fig.   Alhe, Steve			<del></del>					30	10	20	25						
Find   Amstrong   Find   Principal   Find   Principal   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find   Find																	
Fig.   Fisher   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding   Finding	F16	Ahle, Steve	Principal	Poinsettia ES								110	135				<u> </u>
Fig.   Subomquist, Tom   Asst. Principal   Caribbad High	***		<del></del>							30	30						<u> </u>
Els   Coelho, Megan   Interim Principal   Avaira Oaks MS		w,	<del></del>	<del>'</del>			40	40						45			<u> </u>
Fig.   Garden   Mapforle   Asst. Principal   Carlsbad High   25 80 40   150 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80 80   160 80 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80   160 80 80 80   160 80 80 80   160 80 80   160 80 80 80   160 80 80 80 80 80 80 80 80 80 80 80 80 80			<u>'</u>								- 50						
Fig.   Hardwork, Cathina   Principal   Calavera Hills   MS   15   18   40   16   18   40   17   18   18   18   18   18   18   18	-		<del></del>				30	120	30	30	60	30	20				· · · · · · · · · · · · · · · · · · ·
Fife   Hartman, Jane   Principal   Jefferson ES						25					-						· · · · · · · · · · · · · · · · · · ·
File   Harman, Jane   Principal   Jefferson ES	_	<del></del>				- 23	- 50		150		100						
Fig.   Follow, Keith	1	· · · · · · · · · · · · · · · · · · ·	<del>+</del>						130		60			20			
Howard, Tina			<del></del>					45	30	60		30		20			The state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the s
Fife   Huesing, Kimberly   Principal   Aviara Oaks ES	-			1 '		16			30				15				<u> </u>
F16   Lord, Bill   Asst. Principal   Carlsbad High   30   30   31   35   9   30   120   150   345   F16   Time spent conducting "Post-Observation" conference with teachers.	-		· · · · · · · · · · · · · · · · · · ·			13		133	50	60	30						· · · · · · · · · · · · · · · · · · ·
Fife   Milliken, Carolyn   Principal   Aviara Oaks MS							20			125		30	43				• • • • • • • • • • • • • • • • • • • •
F16   Morales, J. Cesar   Principal   Valley MS   S							30		30	133		00	20	150			· · · · · · · · · · · · · · · · · · ·
F16   Stanchi, Margaret	$\vdash$										00	90		40			· · · · · · · · · · · · · · · · · · ·
F16 Tubbs, Richard Principal Hope ES			<del>+ · · · · · · · · · · · · · · · · · · ·</del>	·			25			40	90	125					
Alle, Steve   Principal   Poinsettial ES   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Carlsbad High   Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal   Save Principal			<del>  '                                   </del>	· · · · · · · · · · · · · · · · · · ·			33				60		00				
F17 Ahle, Steve Principal Poinsettia ES	L10	Tubbs, Richard	Principal	Hope ES				270	00	50	00						Time spent conducting Post-observation conference with teachers.
F17 Giordani, Marjorie Asst. Principal Carlsbad High 5 20 10 40 20 25 120 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F17 Hartman, Jane Principal Jefferson ES 5 20 10 5 40 20 25 120 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F18 Hartman, Jane Principal Buena Vista ES 5 15 30 20 10 5 75 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Huesing, Kimberly Principal Aviara Oaks ES 5 10 15 30 20 10 5 75 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Huesing, Kimberly Principal Carlsbad High 5 10 30 10 5 80 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Huesing, Kimberly Principal Carlsbad High 5 10 5 80 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Stanchi, Margaret Principal Carlsbad High 5 10 5 80 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Hope ES 6 10 10 10 70 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Hope ES 7 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Hope ES 80 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Hope ES 80 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Reflecting Conference worksheets.  F19 Tubbs, Richard Principal Reflecting Conference worksheets.  F19	617	A11 61	<b>D</b> 1 1 1	D (								20	10				
F17 Hancock, Catina Principal Calavera Hills MS 5 20 10 40 20 25 120 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F17 Hartman, Jane Principal Jefferson ES 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5			· · · · · · · · · · · · · · · · · · ·							20		20					
F17 Hartman, Jane Principal Jefferson ES	$\vdash$		· · · · · · · · · · · · · · · · · · ·					- 10		30							
F17 Howard, Tina Principal Buena Vista ES	-	<u> </u>	· · · · · · · · · · · · · · · · · · ·			5	20	10				20	25				
F17 Huesing, Kimberly Principal Aviara Oaks ES 20 15 45 5 85 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F17 Lord, Bill Asst. Principal Carlsbad High 10 10 10 10 15 15 15 15 15 15 15 15 15 15 15 15 15			<del>-</del>					4.5				- 4.0		10			
F17 Lord, Bill Asst. Principal Carlsbad High 10 30 1 5 30 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F17 Stanchi, Margaret Principal Carlsbad High 10 20 15 5 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F18 Able, Steve Principal Poinsettia ES 80 5 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Stanchi, Margaret Principal Poinsettia ES 80 5 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Stanchi, Margaret Principal Poinsettia ES 80 6 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 Stanchi, Margaret Principal Poinsettia ES 80 6 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F19 Stanchi, Margaret Principal Poinsettia ES 80 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 Stanchi, Margaret Principal Poinsettia ES 80 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 Stanchi, Margaret Principal Poinsettia ES 80 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 Stanchi, Margaret Principal Poinsettia ES 80 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  F10 F17 Notes from "Post-Observation" conferences and preparing R			<del>'</del>	<del> </del>	L			15		30	20						
F17 Stanchi, Margaret Principal Carlsbad High 10 10 1 10 1 10 10 10 10 10 10 10 10 10	-		<u> </u>									15	45	- 5			
F17 Tubbs, Richard Principal Hope ES 45 10 20 15 90 F17 Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.  G18 Ahle, Steve Principal Poinsettia ES 80 90 90 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Bloomquist, Tom Asst. Principal Carlsbad High 90 90 90 90 90 90 90 90 90 90 90 90 90		<u>-</u>	<del>                                     </del>						30								
G18 Ahle, Steve Principal Poinsettia ES 80 90 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Amstrong, Tessie Principal Kelly 90 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Bloomquist, Tom Asst. Principal Carlsbad High 90 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Coelho, Megan Interim Principal Aviara Oaks MS 90 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Giordani, Marjorie Asst. Principal Carlsbad High 90 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Giordani, Marjorie Asst. Principal Calavera Hills MS 90 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hartman, Jane Principal Jefferson ES 90 900 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.			· '				10										
G18 Ahle, Steve Principal Poinsettia ES 80 9 90 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Armstrong, Tessle Principal Kelly 9 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Bloomquist, Tom Asst. Principal Carlsbad High 9 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Coelho, Megan Interim Principal Aviara Oaks MS 9 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Giordani, Marjorie Asst. Principal Carlsbad High 9 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Giordani, Marjorie Asst. Principal Calavera Hills MS 9 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hartman, Jane Principal Jefferson ES 9 9 980 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	F17	Tubbs, Richard	Principal	Hope ES				45	10	20	15						
G18 Armstrong, Tessie Principal Kelly S S S G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Bloomquist, Tom Asst. Principal Carlsbad High S S S G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Coelho, Megan Interim Principal Aviara Oaks MS S S S S G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Giordani, Marjorie Asst. Principal Carlsbad High S S S G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hancock, Catina Principal Calavera Hills MS S S S G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hartman, Jane Principal Jefferson ES S S G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	$\sqcup$																
G18 Bloomquist, Tom Asst. Principal Carlsbad High 45 30 180 255 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Coelho, Megan Interim Principal Aviara Oaks MS 240 240 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Giordani, Marjorie Asst. Principal Carlsbad High 60 30 60 480 630 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hancock, Catina Principal Calavera Hills MS 240 45 200 2085 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hartman, Jane Principal Jefferson ES 60 60 60 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	$\overline{}$			-		80											
G18 Coelho, Megan Interim Principal Aviara Oaks MS	G18	Armstrong, Tessie	Principal	Kelly												G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18 Giordani, Marjorie Asst. Principal Carlsbad High 60 30 60 480 630 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hancock, Catina Principal Calavera Hills MS 45 2040 2085 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hartman, Jane Principal Jefferson ES 60 60 60 618 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.			Asst. Principal	Carlsbad High						45			30			G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18 Hancock, Catina Principal Calavera Hills MS 45 2040 2085 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.  G18 Hartman, Jane Principal Jefferson ES 60 60 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	G18	Coelho, Megan	Interim Principal	Aviara Oaks MS										240	240	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18 Hartman, Jane Principal Jefferson ES 60 60 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	G18	Giordani, Marjorie	Asst. Principal	Carlsbad High							60	30	60	480	630	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
	G18	Hancock, Catina	Principal	Calavera Hills MS						45			2040		2085	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18 Hines, Jimmy Principal Magnolia ES 120 G18 Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	G18	Hartman, Jane	Principal	Jefferson ES										60	60	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
	G18	Hines, Jimmy	Principal	Magnolia ES										120	120	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.

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Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Code	Activity
G18	Holley, Keith	Director	CVA/CSA									880	390	1270	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18	Howard, Tina	Principal	Buena Vista ES							110	70		540	720	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
	Huesing, Kimberly	Principal	Aviara Oaks ES										120	120	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18	Lord, Bill	Asst. Principal	Carlsbad High				<u></u>		60					60	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18	Milliken, Carolyn	Principal	Aviara Oaks MS									180		180	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18	Morales, J. Cesar	Principal	Valley MS										180	180	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18	Stanchi, Margaret	Principal	Carlsbad High							180	120	60		360	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
G18	Tubbs, Richard	Principal	Hope ES										890	890		Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
															G18 To	al
	Ahle, Steve	Principal	Poinsettia ES		20								1195	1215	H19	Time spent preparing before Final Evaluation conferences with teachers.
	Armstrong, Tessie	Principal	Kelly				<u> </u>						330	330		Time spent preparing before Final Evaluation conferences with teachers.
	Coelho, Megan	Interim Principal	Aviara Oaks MS										60	60	H19	Time spent preparing <b>before</b> Final Evaluation conferences with teachers.
	Giordani, Marjorie	Asst. Principal	Carlsbad High								40		60	100	H19	Time spent preparing <b>before</b> Final Evaluation conferences with teachers.
	Hancock, Catina	Principal	Calavera Hills MS									25	70	95	H19	Time spent preparing <b>before</b> Final Evaluation conferences with teachers.
	Hartman, Jane	Principal	Jefferson ES										60	60	H19	Time spent preparing <b>before</b> Final Evaluation conferences with teachers.
H19	Hines, Jimmy	Principal	Magnolia ES										120	120	H19	Time spent preparing before Final Evaluation conferences with teachers.
H19	Holley, Keith	Director	CVA/CSA									120	120	240	H19	Time spent preparing before Final Evaluation conferences with teachers.
H19	Howard, Tina	Principal	Buena Vista ES										390	390	H19	Time spent preparing before Final Evaluation conferences with teachers.
H19	Huesing, Kimberly	Principal	Aviara Oaks ES										15	15	H19	Time spent preparing <b>before</b> Final Evaluation conferences with teachers.
H19	Lord, Bill	Asst. Principal	Carlsbad High										60	60	H19	Time spent preparing <b>before</b> Final Evaluation conferences with teachers.
H19	Milliken, Carolyn	Principal	Aviara Oaks MS									240		240	H19	Time spent preparing before Final Evaluation conferences with teachers.
H19	Stanchi, Margaret	Principal	Carlsbad High										30	30	H19	Time spent preparing before Final Evaluation conferences with teachers.
	•													2,955	H19 To	al Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Control of the Con
H20	Ahle, Steve	Principal	Poinsettia ES		15								1225	1240	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Bloomquist, Tom	Asst. Principal	Carlsbad High	<u> </u>									180	180	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Coelho, Megan	Interim Principal	Aviara Oaks MS										540	540	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Giordani, Marjorie	Asst. Principal	Carlsbad High								60		300	360	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Hancock, Catina	Principal	Calavera Hills MS									75	195	270	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Hartman, Jane	Principal	Jefferson ES										120	120	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Hines, Jimmy	Principal	Magnolia ES										120	120	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Holley, Keith	Director	CVA/CSA									105	240	345	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Huesing, Kimberly	Principal	Aviara Oaks ES										10	10	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Lord, Bill	Asst. Principal	Carlsbad High										120	120	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Milliken, Carolyn	Principal	Aviara Oaks MS						160			300		460	H20	Time spent conducting Final Evaluation conferences with teachers.
	Stanchi, Margaret	Principal	Carlsbad High								40	20	40	100	H20	Time spent conducting Final Evaluation conferences with teachers.
H20	Tubbs, Richard	Principal .	Hope ES										380	380	H20	Time spent conducting Final Evaluation conferences with teachers.
														4,245	H20 To	al .
	Ahle, Steve	Principal	Poinsettia ES		30								175	205	H21	Time spent preparing/organizing notes from Final Evaluation conferences with teachers.
H21	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	H21	Time spent preparing/organizing notes from Final Evaluation conferences with teachers.
H21	Hancock, Catina	Principal	Calavera Hills MS									25	70	95	H21	Time spent preparing/organizing notes from Final Evaluation conferences with teachers.
H21	Hartman, Jane	Principal	Jefferson ES										60	60	H21	Time spent preparing/organizing notes from Final Evaluation conferences with teachers.
H21	Holley, Keith	Director	CVA/CSA								T	60		60	H21	Time spent preparing/organizing notes from Final Evaluation conferences with teachers.
H21	Huesing, Kimberly	Principal	Aviara Oaks ES										10	10	H21	Time spent preparing/organizing notes from Final Evaluation conferences with teachers.
													T	610	H21 To	al .
122	Ahle, Steve	Principal	Poinsettia ES						200					200	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
	Armstrong, Tessie	Principal	Kelly		60									60	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Bloomquist, Tom	Asst. Principal	Carlsbad High	30										30	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.

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Code	Last, First Name	Title	Site	8/10	9/10	10/10	11/10	12/10	1/11	2/11	3/11	4/11	5/11	Total	Code	Activity
122	Devich, Robert	Principal	Pacific Rim ES	30	2									32	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Giordani, Marjorie	Asst. Principal	Carlsbad High								10			10	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Hancock, Catina	Principal	Calavera Hills MS		65									65	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Harden, Leslie	Principal	Calavera Hills ES	30	45	30								105	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Hines, Jimmy	Principal	Magnolia ES			25					40			65	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Howard, Tina	Principal	Buena Vista ES	120	120						120			360	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Huesing, Kimberly	Principal	Aviara Oaks ES		60									60	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Lord, Bill	Asst. Principal	Carlsbad High	30								120		150	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Morales, J. Cesar	Principal	Valley MS		90									90	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
122	Stanchi, Margaret	Principal	Carlsbad High	30	30									60	122	Discussing the STAR results, with teachers, and how to improve instructional abilities.
														1,467	122 Total	
														90,140	<b>Grand Tot</b>	tal
													A1	1,455		Preparing before training or planning meetings/conferences.
													A2	2,562		Time spent training or in planning meetings/conferences.
		<u> </u>											A3	1,065		Preparing/organizing notes from training or planning meetings/conferences.
													B4	2,750		Time spent preparing <b>before</b> meeting with teachers.
													B5	5,004		Time spent in actual conference with teachers.
			-										B6	1,692		Time spent preparing or organizing notes from meetings with teachers.
													C7	720		Time spent preparing <b>before</b> "Pre-Observation" conferences with teachers.
													C8	3,325		Time spent conducting "Pre-Observation" conference with teachers.
		+											C9 D10	535		Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
														1,825		Time spent preparing <b>before</b> classroom observations of teachers.
													D11	30,695		Time spent in "informal" classroom observations.
													D12	8,790 3,900		Time spent in "formal" classroom observations and initial preparation of Collect Data forms.  Preparing/organizing notes from classroom observations, finalizing "Collect Data" forms.
													E14	1.825		Reports on observations, preparing the <b>Standards for Excellence in Teaching</b> observation checklists.
											_		F15	1,375		Time spent preparing before "Post-Observation" conferences with teachers.
						-							F16	4,295		Time spent preparing perore Post-Observation conferences with teachers.  Time spent conducting "Post-Observation" conference with teachers.
													F17	570		Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.
			+										G18	8,480		Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
													H19	2,955		Time spent preparing before Final Evaluation conferences with teachers.
													H20	4,245		Time spent conducting Final Evaluation conferences with teachers.
													H21	610		Time spent preparing/organizing notes from Final Evaluation conferences with teachers.
										-			122	1,467		Discussing the STAR results, with teachers, and how to improve instructional abilities.
															117,300	· · · · · · · · · · · · · · · · · · ·
$\neg$														=,=.0		
				-		لـــــــــــــــــــــــــــــــــــــ										

#### Tab 7

A6.PS

■ A.5.31

Unallowable evaluation - not included in the district's claims Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation
Allowable evaluation - change made using additional documentation.

Note: Some evaluations were not included in the district's claims, but were allowable.

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	****						· ·					wable	Evalua	tions			
						Tier i		Tier II /	1987								
448			The state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the s			Temp		Perm									
		1				Prob		10 yrs exp				1					
l and Manua	Clast Massa		CUD SECT CONTRE SECT	Cat	Date of	(1 eval	i i	Eval every									
Last Name Barrie	First Name Jennifer (Peck)	SITE	SUBJECT / GRADE LEVEL	Funds	Hire	per yr)		5 yrs	Evaluator	Date of <u>Last</u> Eval	Perm	Prob	Temp	Total	Comments		
Boggs	Martha	AOE	4 3		8/26/02	Prob 2	Perm	-		6/6/06	1 1	—	ļ	<u> </u>	1		
Burda	Jan	AGE	1		9/3/87	P100 2	Perm	X/09		6/6/06 6/17/2002; 4/23/04		1 1					
Foster	Jeff	AOE	2		9/8/94		Perm	X/09		6/17/2002; 5/21/04					No evaluation completed. Date of last eval was 4/23/04.		
Fuller	Jessica	AOE	5		9/10/03	1	Perm	7,000		6/6/06	1				No evaluation completed. Date of last eval was 5/21/04.		
Garcia	Gina	AOE	3 -		8/27/04	Prob 2		1		2/3/06; 6/8/06	†	1 1	<b>-</b>	<b>†</b>	1		
Georgopoulos	John	AOE	5		8/26/05	Temp 1			S. Maddox	6/14/06			1	1			
Gilmore Hasty	Kathleen Sarah	AOE	3		8/28/00	<b>_</b>	Perm			5/31/06	1			1			
Hogg	Gayle	AOE	5	<del> </del>	8/24/05	Temp 1			T. Howard	1/31/06; 6/8/06	<del>                                      </del>	ļ	1	1			
Johnson	Erin	AOE	4	<del>                                     </del>	1/27/97 9/1/00	+	Perm		<u> </u>	6/12/06 5/6/06	1 1		_	-			
Kirsch	Donna	AOE	KDG		8/27/05	Prob 2	rem		S. Maddox	2/27/06; 6/8/06	+-	f	-	1			
Matula	Alice	AOE	1		8/29/96	111000	Perm		O. Maddox	6/9/06	+ 1	<del> </del>	_	<del>                                     </del>			
		T		1		T .		<b></b>	T. Howard	9,9,00	<u> </u>	<del></del>		<del> </del>			
Moschner-Arganda		AOE	1	1	8/26/05		L		S.Maddox	3/1/06		1		1	ıl		
Rushing	Jami	AOE	3	<del>                                     </del>	8/26/05	Prob 2			S. Maddox	2/7/06; 6/2/06		1					
Sauritch	Judy	AOE	2	+	8/29/96	1	Perm	ļ		6/8/06	1						
Slamon	Patricia	AOE	1	1	9/3/87	1	Perm	X/11		10/24/03; 4/23/04;	1 .						
Thomason	Bethany	AOE	i k	<del>                                     </del>	8/28/00	<del>                                     </del>	Perm	<del>  ^''</del>	<del>                                     </del>	5/24/06 5/3/06	+!		<b></b>	1 - 1			
Vasquez	Cynthia	PR	2	<del> </del>	9/5/90	!	Perm	<b></b>	S. Ahle	10/3/05 5/15/06	+ +		<b></b>	+ - }			
Ward	Jill M.	AOE	2		8/26/05	Prob 2		<u> </u>	S. Maddox	5/6/06	<del>                                     </del>	1	<del></del>	† ;			
Weatherall	Ellen	AOE	1		9/18/84	3.5	Perm	X/09		4/23/04			5170.4E	C	No evaluation completed. Date of last eval was 4/23/04.		
Cobb	Emma	AOE	SE - SDC - Intermediate		8/26/02		Perm			5/6/06	1			1			
Ishibashi Slovin	Nobi	AOE	Special Education -		9/9/82		Perm			5/1/03; 5/24/06	1			1			
SIOVIII	Sue	AOE	DIS/Spch/Lang (K-2 Elem)		9/8/76		Perm /	X/07		5/1/99	ļ			C	No evaluation completed. Date of last eval was 5/1/99.		
Ashton	Brian	АОМ	Counselor		8/28/00		196 Days			5/1/06							
MILLER T		7,000	Science Wheel (Gr 6 Earth		0/2.0/00		130 Days	English The	200	5/1/00	200000000000000000000000000000000000000		1898-3- E	1 6	Counselors not eligible for reimbursement		
Burns	Bob	AOM	Science?)		8/28/97	1	Perm			5/6/06	1			١ ,			
Covington	Robert	AOM	Eng 7 / Spanish		8/27/01		Perm			6/12/06	1			1			
Cowan	Valerie	AOM	Gr 7 Science		8/28/00		Perm			4/20/06	1			1			
Decosmo Dodaro	Lynne	AOM	Art	1	9/2/93		Perm			5/11/06	1			1			
Hauck-Wood	Mark Whitney	AOM	Science/math Eng 8 / AVID	<del></del>	9/6/84		Perm			5/6/06	1	<u> </u>		1			
Jaynes	Julie	AOM	Gr 8 Math	<del>                                     </del>	8/27/01 8/27/01	_	Perm Perm			5/16/06 6/2/06	1 1	<b>-</b>		1			
		110,11	Gi O Watti		0/2//01		Perm 196			6/2/06	<del>  '</del>	C1079-2823	e::00.101.	1			
Koepping	Suzi	AOM	Library Media Spclst		9/2/93	1	Days			5/18/06				0	Library Media Specialists not eligible for reimbursement		
Martin	Mary	AOM	Gr 7 English/Social Studies		8/27/01		Perm			6/12/06	1			1	Carton y modul, operations for engine for remipulational		
McGinnis	Todd	AOM	PE		10/11/00		Perm			5/10/06	1			1			
Mamana	IZ-15. I	1	Gr 8 English - Humanities EL				!		l.								
Momeyer Moreno	Kelly L. John	AOM	Student(s) Gr 7 Math	<del> </del>	8/26/05 8/26/05	Temp 1 Prob 1			M. Watson	4/29/06	ļ		1	1			
Viurray	Frederick	AOM	Math 7, Math 7/8		8/25/03	PIOU I	Perm		M. Watson	6/16/06 5/1/06	ļ	1					
O'Neill	Michelle	AOM	Gr 7 History - Soc Studies	t -	8/25/03	<del>                                     </del>	Perm			5/8/06	1	<b></b>		1			
Pier	David	AOM	Gr 6 Math / PE	1	9/2/99		Perm		` .	5/6/06	1		<del></del>	1			
Pierce	Robert	AOM	PE		9/2/99		Perm			5/1/06	1			1			
Riis	Elizabeth	AOM	Gr 6 Science - Earth Science		9/2/99		Perm			4/29/06	1			1			
Rodak (Oakes)	Sharon	AOM	Gr 6 Humanities	<del></del>	8/27/01		Perm			5/6/06	1			1			
Rogo	Greg	AOM	Gr 8 Science - Physical Science / PE	1	0,000,000		D										
Ruppert	Michael	AOM	Gr 8 Social Studies	<del> </del>	8/29/96 6/18/05	<b></b>	Perm Perm			5/10/06	1			1			
Schuck	Andrea	AOM	Drama	<del> </del>	9/11/97		Perm	-		5/31/06 5/1/06				1			
Schweizer	Susan	AOM	Gr 6/7 Social Science	<b>†</b>	9/5/90		Perm		·	5/6/06	+ +			1			
		1	Gr 6 Humanities: English & Social						-	- 5,5,55	'			† <u>'</u>			
Standley	Cynthia	AOM	Studies / Yr. Bk.	0.60	9/2/99		Perm			6/13/06	1		_	1			
/isnjic	Branislav	AOM	Gr 7 Science , PE		8/27/04	Prob 2			M. Watson	5/1/06		1		1			
/ager Anez	Deborah Kristin	AOM	Gr 8 Soc Studies		2/2/87		Perm			6/17/06	1			1			
nez Grace	Jacqueline	AOM	SE - English / Study Skills SE - Grade 6	1	8/26/05	Prob 2				5/6/06	$\vdash$	1		1			
-,		AUM	Speech / Language Pathologist -	<del> </del>	8/27/04	Prob 2	**			5/6/06	<b> </b>	1		1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
nquist	Carol	вv	PreSchool		8/26/05	Prob 2			DeAnda	6/16/06		됐습		۸ ا	Organistical transference and Alberta transference		
ûm.	Gina	₿V	SE - Pre-School / SDC		8/27/04	Prob 2	25.75		DeAnda	6/16/06			<del>) 1 - 1 - 1</del>		Preschool teachers not eligible for reimbursement  Preschool teachers not eligible for reimbursement		
Cott	Stacie (Anastacia)	BV	SE - PreSchool - SDC	No and a	10/3/02		Perm		DeAnda	6/16/06					Preschool teachers not eligible for reimbursement  Preschool teachers not eligible for reimbursement		
Cook	Joanne	CVA	Home Education - Grade(s) K-6														

A6.PS

A.5.31

Key Unallowable evaluation - not included in the district's claims Unallowable evaluation - included in the district's claims

Unaflowable evaluation - change made using additional documentation
Allowable evaluation - change made using additional documentation
Note: Some evaluations were not included in the district's claims, but were allowable.

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Distriction of the State of the				-1859		0.000	•				Allo	owable	Evalua	tions		
			SUBJECT / GRADE LEVEL	Cat Funds	Date of	Tier I Temp Prob (1 eval		Perm 10 yrs exp Eval every	na line							
Last Name Crosby	First Name Michelle	SITE	Home Education - Grade(s) 9 - 12		9/2/99	per yr)	Perm Perm	5 yrs 6/14/2011	Evaluator	Date of <u>Last</u> Eval 4/18/06	Perm	Prop	Temp	Total	Comments	
Oloso,	Macrono	-	Opportunity: Grade(s) 7/8 (labeled		3/2/33	+	1 61111	0/14/2011	ixinoney	4/10/00	0 0	33 03667	-		Evaluation already counted under Site - CVA; Subject - English 3, Loc/Tech CSA	
Williford	Wade	CVA	Elementary)	]	1/7/02		Perm	i	K Holley	4/21/06		1				
Baima	Lane	CHE	1		8/26/05	Temp 1			D Vocicka	5/17/06				1		
Bwarie	Norma	CHE	2		8/27/01	ļ	Perm		D Vocicka	5/13/06		1		1		
Dooley	Jessica	CHE	1	<del> </del>	8/26/05	Temp 1			D Vocicka	5/17/06		1	<u> </u>	4 1		
Durnan Hejny	Christie Kristine	CHE	1 3	+	9/3/96 8/27/01	<del>                                     </del>	Perm Perm		D Vocicka D Vocicka	5/18/06 2/16/06 5/17/06	-	1		1 1		
Hemmings	Joanne	CHE	5	<del> </del>	8/26/05	Temp 1	reini		D Vocicka	5/17/06	+	<del>' </del>	<del> </del>	1 1		
Lyon	Rod	CHE	4	† · · · · · · · ·	8/27/04	Tomp :	Perm		D Vocicka	5/17/06	+ -	1	<del> </del>	1		
Norton	Gabie	CHE	4		8/27/04	Prob 1			D Vocicka	5/17/06	+-	<del>'</del>	<b>†</b>	1		
Phillips	Mary	CHE	2		8/27/01	Ī	Perm		D Vocicka	6/9/06		1		1		
Phillips	Paulette	CHE	1		9/3/98	1	Perm		D Vocicka	6/8/06	_	1		1		
Smith	Aimee	CHE	3		9/3/98		Perm		D Vocicka	56/06		1		1		
Stough Thompson	Lindsay Kristi	CHE	1 K		8/27/01		Perm		D Vocicka	5/18/06		1		1 1		
Thompson	Kimberly	CHE	. 2	+	9/5/90 8/26/05	Temp 1	Perm	<del> </del>	D Vocicka D Vocicka	6/7/06 5/17/06		4—	<del>-</del>	1 1		
Wilson	Erin	CHE	4		9/9/04	Temp 2			D VOCICKA	1/25/06	+	+	-			
Adams	Patricia	CHM	Gr 8 English , Chorus	<b>—</b>	9/3/98	Tempz	Perm		E. Trogden	5/13/2006 6/11/06	+		ļ	+ +		
		1	Tech Dev/1, Math/1, Pre Alg/2,		-,-,						+	<del>'</del>	<del>                                     </del>	†		
Adelgais	Sharon	CHM	Math/1		8/28/97		Perm		E. Trogden	6/11/06	1 1	,	1	1		
			Gr 6 Eng/2, Soc Stu/1, Gr 6 Eng/1,											1		
Bowen	Laura	СНМ	Soc Stud/1	0.20	9/18/84		Perm			5/31/06		Ц		1		
			Intro Broadcast/1, Inter	ł									1	1		
Cooper	Corinne	СНМ	Broadcast/1, Gr 7 Math/2, Intro Broadcast/1	İ	0/5/05		D		E Tonadan	0/44/00	Ι.	.	1	1		
Cooper	Connie	CHIVI	Gr 7 English/2, Gr 7 English/2, Gr	1	9/5/95	ļ —	Perm		E. Trogden	6/11/06	<del>                                     </del>	<b>'</b>	1	1 1		
Embrey	Heather	СНМ	7 Soc Stud/2		8/26/05	Prob 2			E. Trogden	6/14/06		Ι.		Ι.		
Evans	Teanna	СНМ	Gr 8 Social Studies	<del> </del>	8/26/05	Prob 2			E. Trogden	6/14/06	+	+-:		1		
Peterson	Robert	CHM	Gr 6 Gen'l Sci:	†	8/27/01		Perm		E. Trogden	6/11/06	1	1	+	<del>  i</del>		
					1	1							Ť			
Roberts	Susan	CHM	Gr 6 Math	<u> </u>	8/28/97		Perm		E. Trogden	6/15/2001 6/11/06	1 1	<u> </u>		1		
	l		Algebra I/2, Alg Found/2, Geom		1	l			L			1				
Robusto Sandoval	AnnaLisa Esmeralda	CHM	Honors Art/1, Gr 7 PE/3, Gr 5 PE/1		8/26/05	Prob 2			E. Trogden	6/14/06		1		1		
Sottile	Aaron	CHM	Gr 8 Science: Gen'l	<del> </del>	8/31/95	Prob 1	Perm		E. Trogden E. Trogden	6/11/06 6/14/06	+		-	- 0	No evaluation received by the district.	
Stapleton	Judi	CHM	Drama, Avid/1, Drama/1	<del> </del>	9/8/94	FIODI	Perm		E. Trogden	6/15/2001 6/11/06	+-,	<del>. '</del>	<del> </del>	1		
Stipe	Holly	CHM	Gr. 7 English/1, Gr 6 English/2	<del>                                     </del>	8/26/05	Prob 1	, 0,,,,,		E. Trogden	6/14/06	<del>                                     </del>	<del>'                                     </del>	<del> </del>	+ +		
'			Spanish II/1, Gr 8 Eng/2, Spanish							6/16/2005	1	<del>                                     </del>	<b></b>	<del>- '</del>		
Tatar	Marisa	CHM	1/2		10/11/04	Prob 2			E. Trogden	6/14/06	1	1		1 1		
Leong	Marissa	CHM	SE - Gr 6, 7, 8		8/26/05	Prob 1				6/14/06		1		1		
Perrelli	Douglas	CHM	SE - SDC: M/M		8/25/04	Prob 1			E. Trogden	6/14/06		1		1		
Walsh Akerson	Sharon Deeanne	CHS	Special Education	-	8/27/04	Prob 1			E. Trogden	6/14/06		1 1	ļ	1		
akerson Blackburn	Daniel "Jake"	CHS	Algebra 2 & 2H Counselor	3275	8/27/04 8/22/05	Prob 2	73 HRS - 73	-20 -2000	T Bloomquist M Stanchi	6/16/06 6/6/06	2003183°	1 1	B. A. S. P. S. C.	1 1		
DIAGROBITE	Daniel Jake	Cito	Codrideio	7.22 - 1	O/ZZ/UO	FIUUZ		21932 129951152	M Stanchi	0/0/00	48, 980	-	1000000	- 0	Counselors not eligible for reimbursement	
Blake	Maria Gomez	CHS	Spanish 1		8/27/04	Prob 2			B Lord	6/15/06		1		1 1	· ·	
Curry	Lisa	CHS	Counselor	2011/04/201	8/22/05	Prob 2	3821.04.8833	Carlotte L	M Stanchi	6/16/06	200		10	1 6	Counselors not eligible for reimbursement	
40.000		43.000							M Stanchi							
Dendy	Katherine "Kate"	CHS	Counseling	1.00	9/23/05	Temp 1			Mgiordani	6/19/06		200		0	Counselors not eligible for reimbursement	
Di Benedetto	Christine	CHS		SLC grant	2/12/07	Temp 1								0	Counselors not eligible for reimbursement	
Cutillo	Natalie	ا میر ا	English, Trans English 1-A, School	l	0/00/6-	اميدوا	ļ		T DI	2/28/06	1		1	i -		
Gutilla	ivatalle	CHS	Success Social Science: World History-		8/26/05	Prob 2			T Bloomquist	6/16/2006	₩	1 1	-	1		
-lachigian	Elena (Medina)	CHS	Culture, Art History-AP	0.00	8/27/01		Perm		B Lord	6/15/06	Ι.		1	1 .		
loyman	Lisa	CHS	English 2	0.00	8/27/01		Perm		B Lord	6/15/06	+ -	+	<del> </del>	1 1		
Keenan	Laetitia	CHS	French 2, 4 / German 1	l	8/25/04	Prob 1	. 5/111			1/20/06	<del>                                     </del>	1	+	<del>  '</del>		
	141	all and	Adv Communications, Peer		F 77 - 10	70392	779	773975	84.0	7.5	1	1	BLOOM I	1985		
Gstler	Joyce	CHS	Advocate, Psychology A		9/10/70		Perm	1,475.0		6/6/96		1		0	No evaluation completed. Date of last eval was 6/6/96.	
Knudsen	Tobin	CHS	PE: Beach Volleyball, PE 1		8/28/97		Perm		B Lord	6/14/06	1			1		
ivingstone	Alexa	CHS	English 1		10/2/00		Perm		T Bloomquist	6/16/06	1			1		
ivingstone	Roderic	CHS	English 1	4.00	9/2/99	+	Perm		M Stanchi	6/14/06	1			1		
hompson	Elske	CHS	Counselor Foundations of Geometry, Algebra	1.00	100	Temp 1	- 1	1.0001.14	M Stanchi	6/16/06	10.50			0	Counselors not eligible for reimbursement	

A6.PS

A.5.31

Unallowable evaluation - not included in the district's claims Unallowable evaluation - included in the district's claims

Unallowable evaluation - change meda using additional documentation Allowable evaluation - change made using additional documentation Note: Some evaluations were not included in the district's claims, but were allowable.

											Alle	owable	Evalua	ions			
100 100 mg				Cat	Date of	Tier I Temp Prob (1 eval		Tier II / Perm 10 yrs exp Eval every									
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Funds	Hire	per yr)	Perm	5 yrs	Evaluator	Date of Last Eval	Parm	Droh	Temn	Tasal	Comments		
			Science: Biology 1, ROP Bio Tech			F 3-7						1	Temp	1 Viai	Comments		
Munn	Susan	CHS	Sk	0.20	8/26/02		Perm	1	M Stanchi	6/18/06	]	1	1	1			
Nasser	Stephanie	CHS	English 2 / Sr. English		8/26/05				T. Bloomquist			1		1			
O'Briant	Ross	CHS	PE: Wt Trng, PE 2, Wrestling		8/227/04	Prob 2	ļ		T Bloomquist	6/16/06		1	1	1			
Owen	Christy	CHS	Vocal Music: Lancer Choir, Chamber Singers, Sound Exp Fine Arts, Sound Express PE, Adv Ensemble		8/27/04	Prob 2			T Bloomquist	6/16/06							
Philippe	Amanda	CHS	English 2 / English 2-H	1	8/26/05				M Stanchi	6/16/06	H	1		1			
Simon	Jeffrey	CHS	Math		11/29/04	Prob 2			B Lord	6/14/06	ll	7		1			
	l_				T				B Lord								
Woolley	Susan	CHS	Math: Algebra 1-B & 2 / Geometry	<u>'                                    </u>	8/24/05				MGiordani	6/14/06	Ш		1	1			
Tomkinson Fuentes	Andrew	CHS	Health, PE 1, Adv Bsktball-F		8/27/04			<u> </u>	M Stanchi	6/ 6/06	Ц	1		1			
ruentes	Kimberly	MAG	SE - English Sk / Study Sk /	<b></b>	8/26/05	Temp 1	ļ	ļ	KWhisnant	5/26/06	1	-	1	1			
DeKosky	Sheila	CHS	School Success Sk World History-Cult / US History/		8/28/00	ļ	Perm		B Lord	6/16/06	ļ	1	_	1			
Co	Brian	CVA	Psychology		9/8/04	Prob 2			K Holley	6/16/06		1 1		1 1			
Cordell	Ron	CVA	Counselor		9/21/95		Perm		K Holley	12/8/06	1 2.34			Ö	Counselors not eligible for reimbursement		
Crosby	Michelle	CVA	English 3, Voc/Tech CSA		9/2/99		Perm	1/20/1900	K Holley	6/19/01 4/18/06		1		1			
Dunn	Joseph	CVA	Environmental Science / US History / Photography Health / Human Biology / Student		11/19/03		Perm		K Holley	4/17/06		1		1			
Eżeir	Eric	CVA	Services / PE / PE Tchr Ass't		3/1/02		Perm		K Holley	4/7/06	! .	.		١.	*		
Hobart	Craig	CVA	English, Human Biology, Health, School Success		8/27/04	Prob 2	Pelli		K Holley	5/15/06	-	<u>'</u>		1			
			Sr. Eng / Eng 2 / Music		I								1				
Straussner	Heidi	CVA	Appreciation		8/27/04	Prob 1			K Holley	6/6/06		1		1			
0	Susan	HOPE							C. Murray	5/17/2000 4/8/02				2.258			
Bussey	lousan	HOPE	P.		9/11/78		Perm	Feb-09	M. Watson	2/1/04				0	No evaluation completed. Date of last eval was 2/1/04.		
Maria La									C.Murray M.Watson	5/22/2000 4/6/02							
Hill	Holly	HOPE	1/2 combo		9/5/90		Perm	5/14/2009	B.Chrisman	5/22/2000 4/6/02							
					0,0,00			0/14/2000	C.Murray	4,17,04		+		·······································	No evaluation completed. Date of last eval was 5/14/04.		
Olson	Linda	HOPE	11		9/9/82		Perm	5/14/2009	B. Chrisman	6/15/2000 5/14/04			42	n	No evaluation completed. Date of last eval was 5/14/04.		
Woods	Nicola	HOPE	SE - SDC		8/26/05	Prob 1			B. Chrisman	1/25/06		1		1			
Amezcua	Irma	JEFF	1		9/3/98		Perm		C. VanVooren	6/14/06	1	1		1			
Horrell	Eudocia	JEFF	1		9/9/89		Perm		C. VanVooren	6/14/06	1	<u> </u>		1			
linich	Elizabeth	JEFF JEFF	K		1/6/97		Perm		C. VanVooren	6/14/06	1	<u> </u>	ļ	1			
angarica Vevarez	Maria Laura Karl	JEFF	K 3		8/27/01	_	Perm		C. VanVooren	6/14/06	1	·		1			
Peabody	Janet	JEFF	PE Specialist	0.60	9/6/84 2/3/97		Perm Perm		C. VanVooren	6/14/06	1 1	·	<u> </u>	1			
Ponce	Luis	JEFF	5	0.00	8/31/95	<del>                                     </del>	Perm		C. VanVooren C. VanVooren	6/14/06 6/14/06	1 -	<u> </u>	-				
fatum	Yolanda	JEFF	ĸ	<u> </u>	8/27/01	<del>                                     </del>	Perm	<b></b>	C. VanVooren	6/14/06		<del>'                                       </del>	<del> </del>	1			
eran-Cruz	Maria	JEFF	2	l	9/3/98		Perm	l	C. VanVooren	6/14/06			<del> </del>	1			
Bentley	Stephanie	KELLY	5		8/27/01		Perm			6/5/06		<del>                                     </del>		1			
Chang	Susan	KELLY	1		9/26/83		Perm			6/21/06		i		1			
Granich	Noelle	KELLY	1		8/28/97		Perm			6/16/06	1	·		1			
(elleher	Lorelei	KELLY	5	<u> </u>	8/27/04	Prob 2			L	6/15/06	1	1		1			
aMontagne /lulvey	Leslie Janis	KELLY	1 K-2	<b></b>	1/28/02		Perm	ļ		6/15/06		4	ļ	1			
Parrish	Peggy	KELLY	K-2 K-1		9/7/77 9/6/84		Perm Perm			5/30/06 5/30/06	1		ļ	1			
chofield	Roberta (Ewing)	KELLY	1		8/27/01	-	Perm		<b>—</b>	5/30/06 6/3/03; 6/16/06	+		<del>                                     </del>				
Shuck	Triesta (Reddick)	KELLY	<del></del>		11/7/05	Proh 1	1 61111			6/3/03; 6/16/06	+-'	+	<del> </del>				
				17 45 0 00	1,,33		F1 12 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	14.5 (May 11.71)		5, 5,000	1	1	-				
Becker .	Lynelle	MAG	1		9/5/85		Perm	X (next eval 2007/08)	J Boone	5/16/03				0	No evaluation completed. Date of last eval was 5/16/03.		
	1				l .			X									
Clark	Lisa	MAG			10/28/92		Perm	(next eval 2007/08)	J Boone	5/22/03							
		17/10			10/20/92		reili	×	A COOLIG	0/2 <u>4/</u> U3		1		0	No evaluation completed. Date of last eval was 5/22/03.		
Collins-Cripe	Juanita Julia	MAG MAG	1 SE - DHH Gr. 1/2	721 k	8/29/96	Toma	Perm	(next eval 2007/08)	J Boone	5/16/03				0	No evaluation completed. Date of last eval was 5/16/03:		
PLATE	Jouna	MAG	SE - DAN GI. 1/2		8/27/05	remp 1				6/19/06		<u> </u>	1	1			

A6.PS

A.5.31

Unallowable evaluation - not included in the district's claims Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation
Allowable evaluation - change made using additional documentation
Note: Some evaluations were not included in the district's claims, but were allowable.

A.6.1 page 4/5

					_						Allo	wable	Evalua	ions			
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Cat Funds	Date of Hire	Tier I Temp Prob (1 eval per yr)	Perm	Tier II / Perm 10 yrs exp Eval every 5 yrs	Evaluator	Date of <u>Last</u> Eval	Perm	Prob	Temp	Total	Comments		
Hein	Wendy	MAG	3		9/1/88		Perm	X (next eval 2007/08)	J Boone	9/1/98; 5/22/03					No evaluation completed. Date of last eval was 5/22/03:		
Lamb	Elizabeth	MAG	3		9/2/93		Perm	(next eval 2007/08)	J Boone	6/1/99; 5/22/03					No evaluation completed. Date of last eval was 5/22/03.		
Libertino	Sandra	MAG	3		8/31/95		Perm	X (next eval 2007/08)	J Boone	6/1/98; 5/22/03							
								X (next eval							No evaluation completed. Date of last eval was 5/22/03.		
Roth	Francisca	MAG	3		9/5/90		Perm	2007/08) X (next eval	J Boone	6/1/98; 5/22/03				C	No evaluation completed. Date of last eval was 5/22/03.		
Seelig	Bobette	MAG	3		9/5/85		Perm	2007/08) X	J Boone	5/1/97; 5/22/03				0	No evaluation completed. Date of last eval was 5/22/03.		
Sewell	Jackie	MAG	2		9/2/93		Perm	(next eval 2007/06) X	J Boone	6/1/98; 5/22/03	}_	132.51		0	No evaluation completed. Date of last eval was 5/22/03.		
Sturiale Arnold	Diana Thalia	MAG	4/5 SE-DHH K		9/6/84 12/10/87		Perm Perm	(next eval 2007/08)	J Boone M. Watson	6/1/99; 5/16/03 6/7/06				0	No evaluation completed. Date of last eval was 5/16/03.		
Cooney	Alice	PR	2		8/26/05	Temp 1	Feiii		S. Ahle	1/30/06; 5/26/06	<del>                                     </del>	4	1	-			
Olsen	Gwyn	MAG	SDC - Preschool	20.00	9/9/98		Perm			6/7/06	177. (6		71.79185	0	Preschool teachers not eligible for reimbursement		
Billingsley	Donna	PR	2		9/2/99		Perm		S Ahle	526/06	1			1			
Bloomquist Chandler	Shauna Tammy	PR PR	1 4	-	8/28/97 9/2/99		Perm Perm		S Ahle	5/15/06 5/15/06	1	<u> </u>		1			
Hebert	Lillian	PR	1		8/26/05	Temp 1	r eiiii		S. Ahle	1/31/06; 5/15/06	<u> </u>	<del>                                     </del>	1	-			
Cotter	Ashley	PR	5		8/26/05	Prob 2			S. Ahle	1/30/06; 5/23/06		1		1			
Cozens	Jamie	PR	3		8/27/01		Perm			5/24/06	1			1			
Dow (Egerstrom) Firth	Kelli Rav	PR	1 3	1	8/25/03		Perm			5/26/06 5/15/06	1	_		1			
Fogarty	Gina	PR	1	<del>                                     </del>	8/27/04	Prob 2	Perm		S. Ahle	1/10/06; 5/24/06	1	<del>                                     </del>		1			
Fox	Kathleen	PR	1 .	·	2/1/99	FIODZ	Perm		S. Aine	5/23/06		<u> </u>					
Gallego	Luisa	PR	K - AM		9/5/85		Perm			5/26/06	1	<u> </u>		1			
Hampton	Anne	PR	3		1/3/00		Perm			5/24/06	1			1			
Houser	Ashley	PR	5		4/1/04	Prob 2				5/15/06	<u> </u>	1		1			
Hughes VanHollebeke	Denise Anne	PR	1 K-PM		8/28/97 8/26/05	Tomo 1	Perm		S. Ahle	5/23/06 1/30/06; 5/23/06	1		1	1			
Jordan	Katie (Euckert)	PR	4		3/27/00	remp i	Perm		S. Allie	5/15/06	1		1	1			
Kim	Henry	PR	4		12/2/02		Perm			5/30/06	<del>   </del>	<del></del>		1			
McCann	Corey	PR	3		8/27/04		Perm			1/31/06; 5/23/06	1			1			
McGowan	Margaret	PR PR	2/3		8/29/96		Perm			5/24/06	1	-		1			
Meyer Moore	Tamara Kathleen	PR	1 3	+	8/26/02 9/1/00	$\vdash$	Perm Perm			5/26/06 5/26/06	1 1			1			
		<del></del>		<u> </u>	3/1/00		. 61111			6/15/01; 4/22/04;	<del>                                     </del>			<del>- '</del>			
Nielsen	Jane	PR	11		9/2/99		Perm			5/26/06	1			1			
Parks	Meagan	PR	2		8/26/05	Prob 2			S. Ahle	1/30/06; 5/15/06		1		1			
Roberts Rowe	Jessica (Hamabe) Patricia	PR PR	3 2	<del> </del>	8/27/01 9/7/83	ļ	Perm Perm			5/24/06 5/30/06	1 1						
Southerland	Scott	PR	5	<del> </del>	8/26/05	Prob 2	rem	-		1/31/06; 5/24/06	<del>                                     </del>	- 1		<del>                                     </del>			
McDonneil	Paul	VMS	SE - SDC/DHH LA, DHH Read, DHH Math, DHH Sci,		8/26/05				R Tubbs	5/1/06			1	1			
Allard	Arah (Fogel)	VMS	Band: Beg / Inter / Adv Orchestra/ Music Appreciation		8/27/04		Perm	X	Millikin	1/17/06; 5/4/06	1			1	Contract No.		
Burns	Kelley	VMS	Gr 6 & 8 PE *EL Student(s)*		3/12/86		Perm	08/09 X		1/27/04				0	No evaluation completed. Date of last eval was 1/27/04.		
Byrne Congleton	Arlette Suzanne (Eggert)	VMS VMS	Alg 1 / Foundations Alg Gr 7 English - Gr 7 Adv English		9/30/92 8/26/02		Perm Perm	08/09	Armstrong Millikin	2/10/04 5/10/06	1			0 1	No evaluation completed. Date of last eval was 2/10/04.		
de Julien De Wulf	Donna Sue	VMS VMS	GR 6 English Art / Adv Art / Wheel 6th (Art)		9/6/84 8/28/00		Perm Perm	X 08/09	Millikin Millikin	9/9/04 5/12/06	1			0	No evaluation completed. Date of last eval was 9/9/04.		

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2005-06



A.5.31

Key Unallowable evaluation - not included in the district's claims Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation

Allowable evaluation - change made using additional documentation

Note: Some evaluations were not included in the district's claims, but were allowable.

											Allo	wable	Evaluat	ions	
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Cat Funds	Date of Hire	Tier I Temp Prob (1 eval per yr)		Tier II / Perm 10 yrs exp Eval every 5 yrs	Evaluator	Date of <u>Last</u> Eval	Perm	Prob	Temp	Total	Comments
									Millikin						
		1	Science Assignment: GR 6	1			1		R Tubbs				ĺ	i	
Donohue	Shawn	VMS	Science			Prob 2			CMillikin	5/5/06		1		1	
Gastauer	Jennifer (Willis)	VMS	Sci 7: Life Science		8/31/00		Perm		R Tubbs	5/4/06	1			1	
Lewis	Mia	VMS	Gr 7 english	0.00	8/28/00		Perm		Millikin	5/8/06	1	1		1	
	1	ŀ	Foundations of Algebra / Algebra 1					1				1			
Pope	Catherine	VMS	GR 8	L	9/28/00		Perm	1	R Tubbs	4/20/06	1			1	
Salz	Stacy	VMS	Gr 8 Social Studies		8/27/04		Perm		Millikin	5/5/06	1	1.		1	
Schulenburg	Olivia	VMS	Music: Show Stopper, Dolce, Ensemble, Viking Singers, Wheel 6 (Musical Theatre)		8/27/01		Perm		Millikin	5/31/06	1			1	
Smith	BreeAnn	VMS	Gr 8 Science / ASB		8/26/05	Prob 2			Millikin R Tubbs C Millikin	1/17/06; 5/15/06		1		1	
Tibbels	Mary J.	VMS	Gr 8 English / Gr 8 Adv English		10/3/83		Perm	X 08/1/09		4/20/04					No evaluation completed. Date of last eval was 4/20/04.
			SE - DHH: LA, Reading & Social	<b>*</b>	1,5/10/00	-	2 (5141)	y.,, 1/08	· · · · · · · · · · · · · · · · · · ·	7,20,04	ALCOHOLOGO	10000A3.3		<u> </u>	ino ovaluation completed. Date or last eval 1885 4/20/04.
Jenkinson	Marylou	VMS	Studies		2/4/91		Perm	1	Millikin	5/30/06	1 .	1	ĺ	۱ ،	
Montes	Penny	CHS	Foreign Language: ASL 3		8/27/01	Temp 1		<del>                                     </del>	B Lord	6/15/06	+	<del> </del>	1	+	
	f,	+		<del> </del>	1 0/2//01	101119	<del> </del>	<del> </del>	2 20.0	5,10,00	106	44	16	400	A.6.5
		+				<del> </del>		Loce number	of Catagorical/C	Frant teachers identified i			10		
		+-		<del>                                     </del>	<del> </del>	ļ		ress unumber	o categorical/c	Transiteatriers identified i	by the dis	Tiot		(6)	
		4		ļ	1	ļ		<b> </b>	<b></b>			<u> </u>		160	· <b>V</b>
	J			!			ł		I	i l	i	1	}		

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2006-07

**A**.5.32

A6.PS

Key

Unallowable evaluation - not included in the district's claims

Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation Allowable evaluation - change made using additional documentation

Note: Some evaluations were not included in the district's claims, but were allowable.

A.6.2 page 1/3

									Allo	wable	Evalua	ations	
Jan H						10 yrs exp/Eval every 5 yrs		Date of					
			3, 44, 175	Date of		Next Eval		<u>Last</u>					
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Hire	Status	Due Date	Evaluator	Eval	Perm	Prob	Temp	Total	Comments
Nicholas	Susan	AOE	3	9/3/92	Perm		S. Maddox	5/29/07	1	ı	T	1	
Saracino	Deirdre	AOE	SE- Teacher	12/9/93	Perm	2011/12	T. Howard	6/15/07	1	1		1	
Slamon	Patricia	AOE	1	9/3/87	Perm	2010/11	T. Howard	5/24/06		- 57		(	No evaluation completed. Date of last eval was 5/24/06. Reimbursed in FY 2005-06.
Severino	Julie	AOE	K	8/27/01	Perm		S. Maddox	5/24/07	1			1	
Slovin	Sue	AOE	DIS/Spch/Lang (K-2 Elem)	9/8/76	Perm	2011/12	T. Howard	6/7/07	1 1			1 1	
Guillen Irwin	Kimberly	AOE	4	8/27/01	Perm	<b></b>	S. Maddox	6/8/07	1	-	<u> </u>	1	
Michaels	Cynthia	AOE	2/3 combo	8/29/01	Perm	0044/40	T. Howard	6/11/07	1 1	<u> </u>	<del> </del>	1 1	
Russell	Laura Monique	AOE	2	8/28/97	Perm	2011/12	S. Maddox	6/11/07			<del> </del>	1 1	
Hogg	Gayle	AOE	1	8/28/00	Perm	2010/11	T. Howard	6/11/07	1	11	1	1	
Carlson	Barbara	AOE	1	1/27/97 8/27/01	Perm	2010/11	S. Maddox T. Howard	6/12/06		100000	4		No evaluation completed. Date of last eval was 6/12/06. Reimbursed in FY 2005-06.
Cordell	Ron	AOM	Counselor	9/21/95	Perm		M. Watson	6/16/07	1	14		1 1	
Visnjic	Branislav	AOM	Gr 7 Science , PE	8/27/04	Perm		M. Watson	6/8/07	1	1		4 5	Counselors not eligible for reimbursement
Hodge	Margaret	AOM	Library Media Specialist	9/29/94	Perm		M. Watson	6/4/07	3 33334	1	<del>                                     </del>	+ 2	Library Media Specialists not eligible for reimbursement
Moreno	John	AOM	Gr 7 Math	8/26/05	Perm		M. Watson	6/7/07	1		1	1 1	Library Media Specialists not eligible for reimbursement
Anez	Kristin	AOM	SE - English / Study Skills	8/26/05	Perm		M. Watson	6/8/07	1 1		ļ	1 1	
Peabody	Janet	AOM	PE Specialist	2/3/97	Perm		M. Watson	5/16/07	<del>                                     </del>				Biannual teacher, not eligible for reimbursement. Reimbursed in FY 2005-06.
Hovis	Christi	AOM	SE - Math / Study Skills	9/8/94	Perm		M. Watson	6/19/07	1			1 1	
Frazee	Leslie	AOM	Gr. 6 - Soc. Studies	8/29/96	Perm		M. Watson	6/6/07	<del>                                     </del>		╅──	1 1	
Brisebois	Beth (Francis)	BV	2	9/7/83	Perm		J. DeAnda	6/14/07	1 1		1	1 1	
Castillo	Susan	BV	1	2/6/84	Perm		J. DeAnda	6/13/07	1		<del>†                                      </del>	1	
Enquist	Carol	вv	Speech / Language Pathologist - PreSchool	8/26/05	Perm			6/13/07					
Fitzpatrick	Joanna	BV	T TOCKHOO!	9/1/96	Perm	T. T VESSES	J. DeAnda	10/7/07	1	1	250.8883	1 - 4	Preschool not eligible for reimbursement
			SE - Spch & Lang Therapist (Preschool intake, Preschool DIS,				U. DeAlida		<u> </u>			<u> </u>	
Jacobs	Nancy	BV	Regional SH preschool)	9/2/99	Perm		ļ	6/1/07	1			1	
Larios	Ana	BV	3	8/27/01	Perm		J. DeAnda	6/14/07	1			1	
Laski	Linda J.	BV	K	9/2/93	Perm		J. DeAnda	6/14/07	1		ļ	1 1	
Little MacPherson	Shane	BV	General Education	9/5/85	Perm		J. DeAnda	6/14/07	1 1		┞	1 1	
Northridge	Margaret Mary	BV	2	11/23/92	Perm		J. DeAnda	6/13/07	1 1		ļ	1 1	
Taylor	Kevin	BV	3	9/6/00 8/29/96	Perm Perm		J. DeAnda J. DeAnda	6/14/07 6/14/07	1 1		ļ	1 1	
Backensto	Karen	CHE	4	8/29/96	Perm		L. Harden	6/14/07	1 1		-	1	
Estep	Sally	CHE	5	8/28/97	Perm		L. Harden	6/18/07	1 1		┼	1 1	
Koopsen	Michelle	CHE	2	8/28/97	Perm	2011/2012	L. Harden	6/7/07	+ -		<del>                                     </del>	1 1	
Marner	Rory	CHE	SE - SDC - Primary	9/8/94	Perm	2011/2012	L. Harden	5/28/07	1 4	+	<del> </del>	1	
L	Karissa	CHE	SE - SDC - Primary	9/8/94	Temp 2		L. Harden	5/28/07	<del>                                     </del>	+	1	-	
		1	SE - Gr 6 & 7, Study Skills/ GR7 SS/	0,0,04	75IP 2		E. Harden	5/2.0/01	<del> </del>	1	<del>' '</del>	<del> </del>	
Gaccetta	Judith	СНМ	GR7 English	9/2/93	Perm		E. Trogden	6/6/07	1 4			.	·
LaBreche	Carol	CHM	ASB/1, core Eng/Soc.Studies	8/26/02	Perm		E. Trogden	6/13/07	1 1	<del> </del>	<del>                                     </del>	1	
Mitchell	Chad	CHM	Science	2/26/98	Perm		E. Trogden	6/13/07	+ ;		<b>-</b>	<del>                                     </del>	
Norton	Gabie	CHM	English	8/27/04	Perm		E. Trogden	6/1/07	1	<del>                                     </del>	<del> </del>	+ ;	
Palenscar	Tom	CHM	Math/Science Core	9/9/82	Perm	2009/10	guon	9/24/04	<del>  '</del>		<del>                                     </del>		No evaluation completed. Date of last eval was 9/24/04.
Roberts	Susan	СНМ	Gr 6 Math	8/28/97	Perm	2010/11		6/11/06	4				No evaluation completed. Date of last eval was 9/24/04.  No evaluation completed. Date of last eval was 6/11/06. Reimbursed in FY 2005-06.
Sandoval	Esmeralda	СНМ	An/1, Gr 7 PE/3, Gr 6 PE/1	8/31/95	Perm	=======	E. Trogden	6/11/07	1	1		1 1	The State Completion, Delic of Rest Stat High 0/11/00, Figure 1000 of 11 F 1 2000-00.
Blackburn	Daniel "Jake"	CHS	Counselor	8/22/05	Perm		M. Stanchi	6/11/07				0	Counselors not eligible for reimbursement
Chamberlain	Heather	CHS	Special Education	8/27/04	Perm		T. Bloomquist		1	1	Table Silver	1	
Dubicz	Robert	CHS	SE - Sr. English Sk, Study Sk	8/27/04	Perm	•	B. Lord	2/5/07	1	†	<del>                                     </del>	1	
Gaitan	Judy	CHS	SE - SDC: Reading Sk 1 / Study Sk Athletic Director / World	9/9/82	Perm		M. Giordani	2/20/07	1	Ì		i	
Greene	Christopher "Chris"	CHS	History/Culture	8/26/05	Perm		M. Stanchi	6/15/07	1			1	

#### Certificated Evaluation Log 2006-07

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2006-07

A.5.32

A6.PS

<u>Key</u>

Unallowable evaluation - not included in the district's claims

Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation Allowable evaluation - change made using additional documentation

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A.6.2 page 2/3

											<b></b>	See See See See See See See See See See	<b>a</b>
				Date of		10 yrs exp/Eval every 5 yrs Next Eval		Date of <u>Last</u>			Evalu		
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Hire	Status	Due Date	Evaluator	Eval	Perm	Prot	Temp	Total	Comments
Hamski	Lisa	CHS	SE - SDC: Life Skills only	8/25/06			T. Bloomquist	6/12/07			1	1	
Isbeli	Paul	CHS	Soc Studies: US History	4/25/96			B. Lord	6/15/07	<u> </u>	<del>' </del>		1	
Jones	Valane	CHS	Health	9/5/90	Perm		M. Giordani	6/11/07	<u> </u>	1		1	
14			SE - SDC: Gen Math Sk 2 / US					1		.			
Kross	Norman	CHS	History Sk / Study Sk	8/28/00	Perm			2/20/07		1		1 1	
			SE - SDC: Core Social Studies & Health / Voc Train Sk / Functional Sk-										
Marsh	Camille	CHS		0/00/00	D			2/20/07		. l		١.	
Martinez	Phillip	CHS	A English	8/28/00 8/25/06	Perm Perm		B. Lord	6/15/07	1	<u>'                                    </u>			
May	John	CHS	Algebra 1, Statistics AP	9/4/86	Perm		M. Giordani	5/18/07	<del>-</del>	;	<del></del> -	1	
Nasser	Stephanie	CHS	English 2 / Sr. English	8/26/05	Perm	<del>                                     </del>	M. Stanchi	6/6/07	<del>                                     </del>	<del>  </del>			
Padilla	Doris	CHS	English 2 & 3	8/29/96	Perm	<del> </del>	T. Bloomquist	6/20/07	-	_	+	1	
Penrod	Susan	CHS	Social Science	8/25/06	Perm		B. Lord	2/5/07	-	<u> </u>	+	1	
Philippe	Amanda	CHS	English 2 / English 2-H	8/26/05	Perm		M. Giordani	6/15/07	-		+	+;	
Pierini	Karissa	CHS	World Languages: Spanish	8/25/06	Perm		M. Stanchi	6/4/07	1		1	1 -	
Purciel	Mark	CHS	Algebra 1-A, Geometry H	9/2/93	Perm		T. Bloomquist	5/16/07	-	<del>                                     </del>	+	1 7	
Sakamoto	Gary	CHS	Algebra 1B	8/31/95	Perm	2011/12	T. Bloomquist		† i	_		1 1	
Spanier	Julia	CHS	SE - Study Skills	8/30/05	Perm			5/9/07	1	il	1	1	
Tessier	Margaret	CHS	Physics	8/25/06	Perm		B. Lord	6/19/07	1			1 1	
Tomkinson	Kristin	CHS	Math	8/25/06	Perm		M. Giordani	5/22/07	1		1	1 1	
Heritage	Kathleen	CSA	Independent Studies Gr 9-12	3/5/92	Perm		M. Stanchi	6/5/07	1	il	+	1	
Holley	Keith	CVA	Dir., Alternative Educ.Programs	8/9/01								0	Directors not eligible for reimbursement
Anderson	Ron	CVA	Fund of Geometry / Algebra 1A	1/28/03	Perm		T. Bloomquist	6/1/07	1			1	
Castro	Anthony	CVA	Humanities	11/3/03	Perm		B. Lord	6/7/07	1			1	
			World History-Cult / US History/							1			
Co	Brian	CVA	Psychology	9/8/04	Perm		M. Giordani	6/8/07	1	1		1	
Crosby	Michelle	CVA	English 3, Voc/Tech CSA	9/2/99	Perm	2010/11		4/18/06				C	No evaluation completed. Date of last eval was 4/18/06. Reimbursed in FY 2005-06.
Metcalfe	Lacy	DO	Lang. Arts Resource Tchr	12/9/93	Perm			6/19/07	1	i I		1	
Vallone	Joyce	DO	TOSA	9/5/90	Perm			6/19/07	1			1	
Bass	Juanita	HOPE	SE - SDC	8/27/01	Perm			6/15/07	1			1	
Brady	Phyllis	HOPE	1	9/2/99	Perm		R. Tubbs	6/15/07	1			1	
Bussey	Susan	HOPE	K	9/11/78	Perm	2008/09		2/1/04				0	No evaluation completed. Date of last eval was 2/1/04.
Hill	Holly	HOPE	1/2 combo	9/5/90	Perm	2008/09	11111	5/14/04				0	No evaluation completed. Date of last eval was 5/14/04.
Nielsen	Janet	HOPE	2	8/28/97	Perm		R. Tubbs	5/7/07	1	1		1	
Olson	Linda	HOPE	1	9/9/82	Perm	2008/09		5/14/04		4 : 3080		0	No evaluation completed. Date of last eval was 5/14/04.
Chavez	Yvonne	JEFF	K	8/28/00	Perm		C. VanVooren	1,,	1	Ц		1	
Doncouse	Estella	JEFF	4	9/8/94	Perm		C. VanVooren		1			1	
Faure-Gault	Livia	JEFF	4	8/29/96	Perm		C. VanVooren		1	<b>_</b>		1	
Gnade	Artene	JEFF	1	1/25/95	Perm		C. VanVooren		1 1			1 1	
Heberer	Teresa	JEFF	2	1/2/01	Perm		C. VanVooren		1		+-	1	
Kopp	Christine	JEFF	5	8/27/01	Perm		C. VanVooren		1			1 1	
McCabe	Eileen	JEFF	. 2	8/29/96	Perm		C. VanVooren					1 1	
Merritt	Rae	JEFF	2	8/29/96	Perm		C. VanVooren				+	1	
Nugent	Therese	JEFF	Special Education	12/13/00			C. VanVooren		1			1	
Serafin	Jason	JEFF	5	8/27/01	Perm		C. VanVooren		1		<del> </del>	1 1	
Shepard Smith	Marilyn	JEFF	Music	9/4/86	Perm		C. VanVooren		1	_	<b>-</b>	1 1	
Smith Stencil	Anne	JEFF	3 Music	9/7/99	Perm		C. VanVooren				+-	1	
	Karen Norma	JEFF JEFF	Music	9/3/87	Perm		C. VanVooren		1		+	1	
Sterett (Casares)			4	8/29/96	Perm		C. VanVooren		1		+-	1	
Thomas	Shelley Dawn	JEFF	Literacy	9/2/99	Perm		C. VanVooren		1		+	<u> </u>	
Kramer	Sheila	KELLY	<u>5</u> 3	8/25/06	Perm		R. Devich	6/15/07	1		+	1	
Lalana	Stielia	KELLY	3	12/1/90	Perm		R. Devich	6/1/07	1		1	1	<u> </u>

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2006-07

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A.5.32

Key

Unallowable evaluation - not included in the district's claims

Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation

Allowable evaluation - change made using additional documentation

Note: Some evaluations were not included in the district's claims, but were allowable.

A.6.2 page 3/3

Limjoco (Hyman) Nichols Rogoff Stone I Taylor Woods Gross I	First Name Gail Cynthia Diane Deborah Elizabeth Nicola	SITE KELLY KELLY KELLY	SUBJECT / GRADE LEVEL SE - SDC: Life Skills only	Date of Hire		10 yrs exp/Eval every 5 yrs Next Eval		Date of					
Limjoco (Hyman) Nichols Rogoff Stone I Taylor Woods Gross I	Gail Cynthia Diane Deborah Elizabeth	KELLY KELLY		Hire		MEXI CAN		Last					
Nichols ( Rogoff   I Stone   I Taylor   I Woods   I Gross   I	Cynthia Diane Deborah Elizabeth	KELLY	SE - SDC: Life Skills only		Status	Due Date	Evaluator	Eval	Perm	Prob	Temp	Total	Comments
Rogoff I Stone I Taylor I Woods I Gross I	Diane Deborah Elizabeth	KELLY		8/25/06	Perm		R. Devich	5/9/07	<b>.</b>	1		1	
Stone   I Taylor   I Woods   I Gross   I	Deborah Elizabeth		4	10/21/97	Perm		R. Devich	6/15/07		1		1	
Taylor I Woods I Gross I	Elizabeth		3	8/28/97	Perm		R. Devich	6/14/07		1		1	
Woods I Gross I		KELLY	3	9/4/86	Perm		R. Devich	6/15/07	1	1		1	
Gross I	Nicola	KELLY	3	2/4/85	Perm		R. Devich	6/15/07	[	1		1	
		KELLY	SE - SDC	8/26/05	Perm		R. Devich	5/9/07		1		1	
direbboff It	Erica	Kelly	3	9/1/00	Perm		Armstrong	6/14/07	]] 1	1		1	
	Heather	KELLY	5	8/25/06	Temp		R. Devich	6/12/07			1	1	
	Thalia	MAG	SE-DHH K	12/10/87	Perm		K. Whisnant	6/15/07	1	1		1	
	Daniel	MAG	Gr 6 & 8 PE *EL Student(s)*	9/5/85	Perm		K. Whisnant	6/8/07		1]	L	1	
	Mary	MAG	K	9/3/98	Perm		K. Whisnant	6/15/07	1			1	
	Laura	MAG	K	9/30/98	Perm		K. Whisnant	6/15/07	1	Ш		1	
_ee	Karol	MAG	2	8/29/96	Perm	2007/08		5/16/03				0	No evaluation completed. Date of last eval was 5/16/03.
			SE - DIS Spch & Lang (HH									100	
	Carol	MAG	caseload)	9/7/90	Perm	2006/07		6/1/02				0	No evaluation completed. Date of last eval was 6/1/02.
	Ashley	PR	5	8/26/05	Perm		S. Ahle	5/30/07	1			1	
	Gina	PR	5	8/27/04	Perm		S. Ahle	5/30/07	1			1	
	Judith	PR	2	11/1/05	Perm		S. Ahle	6/18/07	1			1	
	Patricia	PR	2	8/28/00	Perm		S. Ahle	6/14/07	1			1	
Southerland S	Scott	PR	5	8/26/05	Perm		S. Ahle	5/30/07	1	<u> </u>		1	
	Debra	VMS	SE - Study Skills/ GR 8 English, GR 8 SS (PER SDCOE)	1/31/00	Perm			6/6/07		ı		1	
	Terry	VMS	Gr 7 Social Studies	8/30/96	Perm	2008/09		5/9/04				0	No evaluation completed. Date of last eval was 5/9/04.
	Ronda	VMS	Grade 6 Science: Earth Science	8/28/97	Perm		Millikin	6/8/07	1			1	
	Lori	VMS	Gr 8 Sci - Physical Science	8/27/01	Perm		Millikin	6/11/07	1			1	
	Kelley	VMS	Gr 6 & 8 PE *EL Student(s)*	3/12/86	Perm	2008/09		1/27/04				0	No evaluation completed. Date of late eval was 1/27/04.
	Arlette	VMS	Alg 1 / Foundations Alg	9/30/92	Perm	2008/09		2/10/04				0	No evaluation completed. Date of late eval was 2/10/04.
	Randy	VMS	Gr 6, 7, & 8 PE	8/28/97	Perm		C. Morales	6/8/07	1			1	
	Corey	VMS	Assessment Center	9/2/03	Temp		T. Armstrong	6/7/07			1	1	
	Dana	VMS	AVID	8/28/97	Perm		C. Millikin	6/12/07	1			1	
lepburn K	Kristina	VMS	Soial Studies 7	8/31/95	Perm		C. Morales	6/11/07		<u> </u>		1	
Kimball N	Marianne	VMS	SE - Math / Study Skills/ GR 6 English/ Gr 6 SS	9/8/94	Perm		T. Armstrong	6/22/07	,			1	
flulvey A	Arthur	VMS	Core math and SS	9/2/99	Perm		C. Millikin	6/13/07	1		1	1	
			SE - LH/SDC: Math 8 Func Skills Academic Core / English 8 / Gr 6, 7& 8 Science / Gr 8 Social Studies /			- "							
	William	VMS	CORE Reading	9/5/85	Perm		C. Millikin	6/8/07	1			1	
	Carleen	VMS	Math 6 / Adv Math 6	8/26/02	Perm		T. Armstrong		1			1	
	Kelly	VMS	ELD Math	8/25/03	Perm		C. Morales	6/13/07	1		L	1	
	BreeAnn	VMS	Gr 8 Science / ASB	8/26/05	Perm		C. Millikin	6/8/07	1			1	
	Ruthie	VMS	Gr 8 English / Gr 8 Adv English	9/3/98	Perm		T. Armstrong	6/4/07	1			1	
ibbels N	Mary J.	VMS	Gr 8 English / Gr 8 Adv English	10/3/83	Perm	2008/09		4/20/04					No evaluation completed. Date of late eval was 4/20/04.
									108			112	A.6.5
					Less nun	ber of Categor	rical/Grant teac	hers identif	ed by th	e distric	rt .	(6)	
									1		T	106	

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2007-08

A.5.33

A6.PS

<u>Key</u>

Unallowable evaluation - not included in the district's claims Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation Allowable evaluation - change made using additional documentation

Note: Some evaluations were not included in the district's claims, but were allowable.

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									Alic	owabl	e Evalu:	ations	
				Date of		10 yrs exp/Eval every 5 yrs Next Eval		Date of					
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Hire	Status	Due Date	Evaluator	Last Eval	Perm	Prob	Temp	Total	Comments
Huesing	Kimberly	AOE	Principal	7/1/07		30.5						0	Principals not eligible for reimbursement
Weatherall	Ellen	AOE	1	9/18/84	Perm	2008/09		4/1/04					No evaluation completed. Date of late eval was 4/1/04.
Burda	Jan	AOE	1	9/3/87	Perm	2008/09	-2	4/28/04			922.00		No evaluation completed. Date of late eval was 4/28/04.
Foster	Jeff	AOE	2	9/8/94	Perm	2008/09		5/21/04					No evaluation completed. Date of late eval was 5/21/04.
Saracino	Deirdre	AOE	SE- Teacher	12/9/93	Perm	2011/12		6/15/07					No evaluation completed. Date of late eval was 6/15/07. Reimbursed in FY 2006-07
Barrie	Jennifer (Peck)		4	8/26/02	Perm		Huesing	4/29/08	1			1	
Cobb	Emma	AOE	SE - SDC - Intermediate	8/26/02	Perm		Huesing	4/29/08	l î			1	
Garcia	Gina	AOE	3	8/27/04	Perm		Huesing	4/29/08	1			1	
Moschner-Arganda		AOE	1	8/26/05	Perm		Huesing	4/29/08	1		T	1	
Hasty	Sarah	AOE	5	8/24/05	Perm		Huesing	5/5/08	1		T	1	
Rushing	Jami	AOE	3	8/26/05	Perm		Huesing	5/5/08	1			i	
Ward	Jill M.	AOE	2	8/26/05	Perm		Huesing	5/5/08	1	Ι.	1	1	
Koldenn	Rosemary	AOE	Special Day Class	8/23/2007	Prob		Huesing	5/6/08		1		1	
McCabe	Kelly	AOE	3	8/25/06	Perm		Huesing	5/7/08	1			1	
Lyon	Syndi	AOE	5	8/25/06	Perm		Huesing	5/8/08	1	T .		1	
Thomason	Bethany	AOE	K	8/28/00	Perm		Huesing	5/8/08	1	Ī		1	
Johnson	Erin	AOE	4	9/1/00	Perm		Huesing	5/12/08	1	T		1	
Pappas	John	AOE	Psychologist	8/16/2007	Temp 1		Huesing	5/12/08				0	Psychologists not eligible for reimbursement
Gilmore	Kathleen	AOE	3	8/28/00	Perm		Huesing	5/13/08	1			1	
Kirsch	Donna	AOE	KDG	8/27/05	Perm		Huesing	5/13/08	1		1	1	
Slamon	Patricia	AOE	1	9/3/87	Perm	2010/11	1.5	5/24/06				0	No evaluation completed. Date of last eval was 5/24/06. Reimbursed in FY 2005-06.
Michaels	Laura	AOE	1	8/28/97	Perm	2011/12	1276	6/11/07					No evaluation completed. Date of last eval was 6/11/07. Reimbursed in FY 2006-07.
Hogg	Gayle	AOE	1	1/27/97	Perm	2010/11		6/12/06		X 30 (5)			No evaluation completed. Date of last eval was 6/12/06. Reimbursed in FY 2005-06.
Sauritch	Judy	AOE	2	8/29/96	Perm	2010/11	2.00	6/8/06		228027			No evaluation completed. Date of last eval was 6/8/06. Reimbursed in FY 2005-06.
Matula	Alice	AOE	1	8/29/96	Perm	2010/11		6/9/06		- 43			No evaluation completed. Date of last eval was 6/9/06, Reimbursed in FY 2005-06.
Millikin	Carolyn	AOM	Principal	7/26/01		- 4	CIEDA N	7.0					Principals not eligible for reimbursement
Kalk	David	AOM	Assistant Principal	9/3/98									Assistant Principals not eligible for reimbursement
Hall	Marina	AOM	Music: Strings	8/25/06	Prob 2		Millikin	4/29/08		1		1	
Knoli	Kevin	AOM	Gr. 6 math	11/1/01	Perm		Kalk	4/29/08	1			1	
Browne	Kathryn	AOM	Band, English	8/25/06	Perm		Millikin	4/30/08	1			1	
Moser-Kohn	Christine	AOM	Humanities - PE	9/6/06	Perm		Kalk	5/1/08	1		i i	1	
Pierce	Robert	AOM	PE	9/2/99	Perm		Millikin	5/6/08	1			1	
Sherman -Ploski	Tessa	AOM	PE/ ASB	8/28/00	Perm		Kalk	5/6/08	1			1	
Jaynes	Julie	AOM	Gr 8 Math	8/27/01	Perm		Millikin	5/7/08	1			1	
Momeyer	Kelly L.	AOM	Gr 8 English - Social Studies	8/26/05	Perm		Kalk	5/7/08	1			1	
Rodak	Sharon	AOM	Gr 6 Eng./Soc. Studies	8/27/01	Perm		Millikin	5/7/08	1			1	
Borders	Natasha	AOM	Gr 8 English, PE: Dance	8/25/03	Perm		Kalk	5/8/08	1			1	
Covington	Robert	AOM	Eng 7 / Spanish	8/27/01	Perm		Millikin	5/8/08	1			1	
Cowan	Valerie	AOM	Gr 7 Science	8/28/00	Perm		Kalk	5/8/08	1			1	
Hauck-Wood	Whitney	AOM	Eng 8 / AVID	8/27/01	Perm		Millikin	5/8/08	1			1	
Martin	Mary	AOM	Gr 7 English/Social Studies	8/27/01	Perm		Kalk	5/8/08	1	I		1	
McGinnis	Todd	AOM	PE	10/11/00	Perm		Millikin	5/8/08	1			1	
Murray	Frederick	AOM	Math 7, Math 7/8	8/25/03	Perm		Kalk	5/8/08	1			1	
Pier	David	AOM	Gr 6 Math / PE	9/2/99	Perm		Millikin	5/8/08	1			1	
Pujji	Anjali	AOM	Math	8/25/06	Perm		Kalk	5/8/08	1			1	
Riis	Elizabeth	AOM	core math and science	9/2/99	Perm		Millikin	5/8/08	1			1	
Ruppert	Michael	AOM	Gr 8 Social Studies	8/28/00	Perm		Kalk	5/8/08	1			1	
Spineto	Erin	AOM	Algebra 1A & 1B	8/27/01	Perm		Millikin	5/8/08	1		t	1	
Burns	Bob	AOM	(Gr 6 Earth Science?)	8/28/97	Perm		Kalk	5/9/08	1 1		1 1	1	
Grace	Jacqueline	AOM	SE - Grade 6	8/27/04	Perm		Millikin	5/9/08	1			1	
^D appas	John	AOM	Psychologist	8/16/2007	Temp 2		Kalk	5/12/08		S 1885	1000 E	D	Psychologists not eligible for reimbursement
Rogo	Greg	AOM	Gr 8 Science - Physical Science / PE	8/29/96	Perm		Millikin	5/12/08	1			1	
Bray	Joan	AOM	Eng/Soc. Studies	1/26/98	Perm		Kalk	5/13/08	1 1			1	

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2007-08

A.5.33

A6.PS

<u>Key</u>

Unallowable evaluation - not included in the district's claims
Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation Allowable evaluation - change made using additional documentation

Note: Some evaluations were not included in the district's claims, but were allowable.

A.6.3 page 2/6

									Allo	wable	Evalua	ations	
				Date of		10 yrs exp/Eval every 5 yrs Next Eval		Date of					
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Hire	Ctatus	Due Date	Evaluator	Last Eval	D	D		l	
O'Neill	Michelle	AOM	Gr 7 History - Soc Studies	8/25/03	Perm	Due Date	Millikin	5/13/08	Penn	PIOD	Temp	Total	Comments
Standley	Cynthia	AOM	.60 English /.40 Yr. Bk.	9/2/99	Perm		Kalk	5/19/08	<del>                                     </del>	-		-	
Wycoff	Debra	AOM	SE - Study Skills	8/25/06	Perm		Millikin	6/13/08	1	<del></del>	<u> </u>		
Emert	Andrea (Shuck)	AOM	Drama	9/11/97	Perm	2010/11	IVIIIIKIII	5/1/06	1		1		No evaluation completed. Date of last eval was 5/1/06. Reimbursed in FY 2005-06.
Decosmo	Lynne	AOM	Art	9/2/93	Perm	2010/11		5/11/06	1				No evaluation completed. Date of last eval was 5/1/06. Reimbursed in FY 2005-06.
De Anda	Jose	BV	Principal	<del>                                      </del>	1 2 7 7 7			,,,,,,,			<del>                                     </del>		Principals not eligible for reimbursement
Howard	Tina	BV	Asst. Principal										Assistant Principals not eligible for reimbursement
Goeltz	Kathryn	BV	Psychologist	8/31/00	Perm	2007-99-50		6/1/08					Psychologists not eligible for reimbursement
Krager	Jessica	BV	Preschool - SDC	8/23/2007	Prob 2		De Anda	5/27/08					Preschool teachers not eligible for reimbursement
Levitt	Amanda	BV	PRESCHOOL INSTRUCTOR	5/10/06		(1) (F)	De Anda	5/27/08					Preschool teachers not eligible for reimbursement
Maulden	Denise	BV	SE - SDC:	8/25/06	Perm		De Anda	5/27/08	1		1	1	
Orzechowski	Rosemarie	BV	Preschool - SDC	8/23/2007	Prob 2		De Anda	5/27/08				C	Preschool teachers not eligible for reimbursement
Zak	Sharon	BV	K	9/18/06	Temp 2		De Anda	5/27/08			1	1	
Harden	Leslie	CHE	Principal	7/1/06								0	Principals not eligible for reimbursement
Grant	Rhona	CHE	3 .	9/2/99	Perm		Harden	6/7/08	1		1	1	
Harway	Christine	HOPE	Learning Center	1/7/08	Temp		Harden	6/4/08			1	1	
Hejny	Kristine	CHE	3	8/27/01	Perm		Harden	6/13/08	1		ļ.,	1	
Kennedy	Jamie	CHE	4	9/1/02	Perm		Harden	6/1/08	1			1	
Koopsen	Michelle	CHE	2	8/28/97	Perm	2011/2012	1.500.00	6/7/07					No evaluation completed. Date of last eval was 6/7/07. Reimbursed in FY 2006-07.
Kunkel	Christine	CHE	1	8/26/05	Prob		Harden	6/13/08		1_	<u> </u>	1	
Langen	Patricia	CHE	5	8/23/07	Temp 2		Harden	6/13/08			1	1	
Matsumoto	Nancy	CHE	K 4	9/2/93	Perm		Harden	6/13/08	1 1		<u> </u>	1	
Nienhaus Phillips	Kathy Paulette	CHE	2	8/27/04	Perm		Harden	6/1/08	1 1	L		1	
Ringen	Renae	CHE	3	9/3/98	Perm		Harden Harden	6/13/08 6/13/08	1-1			1	
Stough	Lindsay	CHE	1	8/27/04 8/27/01	Perm		Harden	6/13/08	<del>                                     </del>		ļ <u>.</u>	1	
Thompson	Kristi	CHE	ĸ	9/5/90	Perm		Harden	6/13/08	1 1			1	
Tinnerstet	Marin	CHE	1	8/25/06	Perm		Harden	6/13/08	+ +		<del> </del>	1	
Van Houten	Merry Ann	CHE	1	2/25/80	Perm		Harden	6/13/08	1	ļ <u>.</u>			
Williford	Wade	CHE	5th?	1/7/02	Perm		Harden	5/8/08	+ +				
Wilson	Erin	CHE	4	9/9/04	Perm		Harden	6/13/08	1				
Withers	Anna	CHE	School Psychologist - Preschool	8/25/06	Perm		7 101 0011	5/27/08		97 . 'SS	3.5		Psychologists not eligible for reimbursement
Hancock	Catina	CHM	PRINCIPAL	1/26/98				0/21/00					Principals not eligible for reimbursement
Evanson	Tim	СНМ	Asst. Principal	1,-4,00					17.00				Assistant Principals not eligible for reimbursement
Adams	Patricia	CHM	Gr 8 English , Chorus	9/3/98	Perm		Hancock	5/2/08	1	1000 C St. / C .		1	A CONSTRUCT AN EXPOSE FOR ENGINEER CONTROL OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF THE PROPERTY OF
Basic	Laurel	CHM	Counselor	8/1/05	Prob 2		Evanson	5/13/08	1000	- XF 13		o	Counselors not eligible for reimbursement
Butler	David	CHM	PE/1, Soc Stu/1, PE/3	8/27/04	Perm	<del>*************************************</del>	Hancock	5/2/08	1			1	
			Gr 7 English/2, Gr 7 English/2, Gr 7 Soc						1			·	
Embrey	Heather	СНМ	Stud/2	8/26/05	Perm		Evanson	5/1/08	1			1	· .
Evans	Teanna	CHM	Gr 8 Social Studies	8/26/05	Perm		Hancock	5/12/08	1			1	
_eong	Marissa	CHM	SE - Gr 6, 7, 8	8/26/05	Perm		Evanson	5/2/08	1			1	
Palenscar	Tom	CHA	Math/Science Core	9/9/82	Perm	2009/10		9/24/04		A 3 1 1 1 3		0	No evaluation completed. Date of last eval was 9/24/04.
Perrelli	Douglas	CHM	SE - SDC: M/M	8/25/04	Perm		Hancock	5/6/08	1			1	
Peterson	Robert	СНМ	Math/Science Core	8/27/01	Perm		Evanson	5/12/08	1			1	
Purser	Joseph	CHM	Orchestra	9/7/06	Prob		Hancock	5/2/08		1		1	
Reck	Richard	СНМ	Eng/SS	9/2/93	Perm		Evanson	5/13/08	1			1	
Roberts	Susan	CHM	Gr 6 Math	8/28/97	Perm	2010/11		6/11/06				0	No evaluation completed. Date of last eval was 6/11/06. Reimbursed in FY 2005-06.
Robusto	AnnaLisa	СНМ	Algebra I/2, Alg Found/2, Geom Honors	8/26/05	Perm		Hancock	5/6/08	1			1	
Sottile	Aaron	CHM	Gr 8 Science: Gen'l	8/24/05	Perm		Evanson	5/12/08	1			1	
Stapleton	Judi	CHM	Drama, Avid/1, Drama/1	9/8/94	Perm		Hancock	5/12/08	1			1	
Walsh	Sharon	CHM	Special Education	8/27/04	Perm		Evanson	5/12/08	1			1	
Vithers	Anna	CHM	School Psychologist - Preschool	8/25/06	Perm		Hancock	5/27/08					Psychologists not eligible for reimbursement
Stanchi	Margaret	CHS	Principal	8/25/77								0	Principals not eligible for reimbursement

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2007-08

A.5.33

A6.PS

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		***							Alle	owable	Evalu	ations	
						10 yrs exp/Eval every 5 yrs							
	e		la	Date of		Next Eval	L	Date of					
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Hire	Status	Due Date	Evaluator	Last Eval	Perm	Prob	Temp	00 (00000000000000000000000000000000000	
Bloomquist	Thomas	CHS	Ass't. Principal-Student Srvcs	7/26/01									Assistant Principals not eligible for reimbursement
Giordani	Marjorie	CHS	Ass't Principal	8/10/06				1	1000	4.6			Assistant Principals not eligible for reimbursement
Lord, IV	Willis (Bill)	CHS	Ass't Principal	11/8/04			la,	1					Assistant Principals not eligible for reimbursement
Aster	Bruce	CHS	Social Studies: US Gov / Econ AP	9/1/88	Perm		Stanchi	6/13/08	1 1	4	ļ	1	
Burroughs	Cathryn	CHS	ROP-	8/23/07	Temp 1		Bloomquist	6/13/08		<b>_</b>	1	1	
Dendy	Katherine	CHS	Counseling	9/23/05	Perm		Giordani	6/10/08		4	35.22	1 0	Counselors not eligible for reimbursement
Evanson Frazier	Timothy Walter ("Jack")	CHS	Special Education	8/23/2007	Prob 2		Lord	5/8/08		11	<b></b>	1 !	
Gamelin		CHS	Soc Studies: World History-Cult	2/1/89	Perm		Stanchi	6/13/08	1		<del> </del>	1 1	
Hall	Tommy	CHS	ROP-	8/23/07	Temp 1		Bloomquist	6/13/08	C 1000-00	<del> </del>		1	
Jones	Marina Shawn (Robert)		Music See Studies: U.S. History	8/23/07	Prob 2		Giordani	5/15/08		Mir.			Evaluation already counted under Site AOM
	Carol	CHS	Soc Studies: US History	9/5/85	Perm	ļ	Lord	4/30/08	<del>                                     </del>		₩.	1 1	
King Martin	Lisa	CHS	ROP-Computer / Application	8/23/07	Temp 1		Stanchi	5/20/08	H	<del> </del>	1 1	1	
Meinhardt	Marisa	CHS	Art English	8/25/06	Perm		Bloomquist Giordani	6/13/08	1	+	1	1	
				8/25/06	Perm			6/12/08	1	-	<u> </u>	1	
Muilenburg	Tod Chelsea	CHS	Science: Cp Marine Sci / Sh Biology 1	9/8/94	Perm	ļ	Lord	6/16/08	1	<del> </del>	-	1	
Murray	Odile	CHS	English	8/23/07	Prob 2		Stanchi	6/13/08		1 1		1 1	
Ponsolle	Odile	L CHS	Dance Dance	8/25/06	Perm		Bloomquist	6/12/08	1	<b></b>		1	
Robertson	Thomas	CHS	Social Studies: Sociology, Yearbook Prod ASB	9/4/69	Perm		Giordani	6/13/08	1			1	
Sakamoto	Gary	CHS	Algebra 1B	8/31/95	Perm	2011/12		1/11/07				0	No evaluation completed. Date of last eval was 1/11/07. Reimbursed in FY 2006-07
Shinnefield	Patrick	CHS	Social Studies	8/25/06	Perm		Lord	5/12/08	1			1	
Straussner	Heidi	CHS	Special Education	8/27/04	Perm		Stanchi	6/20/08	1			1	
Tejada	Zoiner	CHS	Spanish 1 & 5, Spanish for S Spk 1 & 2	9/25/89	Perm		Bloomquist	4/29/08	1	T		1	
Zeigler	Paul	CHS	Physics 1-H & 2-E	9/4/91	Perm		Giordani	6/13/08	1			1	
Holley	Keith	CVA/CSA	Principal/Director Alternative Ed.	8/9/2001					. 22			О	Principals not eligible for reimbursement
Cook	Joanne	CSA	Home Education - Grade(s) K-6	8/25/03	Perm		Holley	6/20/08	1			1	
Crosby	Michelle	CSA	Home Education - Grade(s) 9 - 12	9/2/99	Perm	2010/11	Holley	4/18/06				0	No evaluation completed. Date of last eval was 4/18/06. Reimbursed in FY 2005-06.
			Environmental Science / US History /									1	
Dunn	Joseph	CVA	Photography	11/19/03	Perm		Holley	5/12/08	1 1			1	
			Health / Human Biology / Student Services	3					1		<u> </u>		
Ezeir	Eric	CVA	/ PE / PE Tchr Ass't	3/1/02	Perm		Holley	5/8/08	1 1	1		1 1	
			ROP - Business - Comp App / Dig Art / Yearbook Prod / ROP Dsktp Pbl / Photo										
Mancuso	Donna	CVA	Shop	8/25/03	Temp 2		Holley	5/9/08			١,	1 1	
Monroe	Arlene	CVA	English	8/25/06	Temp 2		Holley	6/13/08	+	<del>                                     </del>	<del>                                     </del>	<del>                                     </del>	
Redfield	Julia	CVA	Counselor	1/29/07	Prob 1		Holley	5/5/08		1	MORE IN	<u> </u>	Counselors not eligible for reimbursement
Smith-Martinez	Tracy	CVA	School Psychologist	9/3/98	Perm		Holley	6/6/08		1			Psychologists not eligible for reimbursement
Tubbs	Richard	HOPE	Principal	8/27/01									Principals not eligible for reimbursement
Bannock (Sweene		HOPE	Special Education	8/25/03	Perm		Tubbs	5/12/08	1			1 1	The state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the s
Bjorstad	William	HOPE	3	9/3/87	Perm		Tubbs	5/12/08	1	l -		1 1	
Bussey	Susan	HOPE	K	9/11/78	Perm	2008/09		2/1/04		1045		n	No evaluation completed. Date of last eval was 2/1/04.
Christian	Sara	HOPE	SE - Speech and Language	8/25/03	Perm		Tubbs	5/19/08	1	1		1 1	11000-1100
Connelly	Denise	HOPE	2	8/29/96	Perm		Tubbs	5/12/08	i	<del>                                     </del>	<b></b>	1 1	
Harway	Christine	HOPE	1	1/7/08	Temp 1		Tubbs	6/4/08	† <b>'</b>	<b>†</b>	1	1 1	
Hill	Holly	HOPE	1/2 combo	9/5/90	Perm	2008/09		5/14/04			N. J. N.	'n	No evaluation completed. Date of last eval was 5/14/04.
Jansen	Joy	HOPE	KDG	8/23/07	Temp 1	,	Tubbs	4/25/08			1		TO ATAMASAN COMPLETON DATE OF IGOT OVER 1100 OF 17/07.
Kaplowitz	Hun	HOPE	Teacher - Elementary	11/0/06	Temp 2		Tubbs	5/12/08	t -	<del>                                     </del>	<del>                                     </del>	<u> </u>	
Koopsen	Scott	HOPE	K	9/1/79	Perm		Tubbs	5/14/08	1	$\vdash$	† <del>-</del>	<del>                                     </del>	
Lawrence	Cheryl	HOPE	4	9/2/93	Perm	<del></del>	Tubbs	5/15/08	+ +	<del> </del>	<del>                                     </del>	1 1	
Lovick	Ann	HOPE	3	8/27/01	Perm		Tubbs	5/1/08	<del>                                     </del>			1 1	
Malkind	Michelle	HOPE	SE - SDC: Life Skills only	8/25/06	Temp 2		Tubbs	4/28/08	<del> </del>	<del></del>	1	1 1	
Mayfield	Myles	HOPE	5	8/28/00	Perm		Tubbs	5/12/08	1		<del>-</del>	1	
Norall	David	HOPE	3 Bilingual	2/3/86	Perm		Tubbs	5/12/08	<del>                                     </del>			1 4	
	1=4		1 O Dankiyadi	1-10,00			. 0000	15/12/00	<u> </u>	L	l .	<del></del>	

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2007-08

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									Alic	wable	Evalu	ations	
				Date of		10 yrs exp/Eval every 5 yrs Next Eval		Date of					
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Hire	Status	Due Date	Evaluator	Last Eval	Perm	Prob	Temp	Total	Comments
Olson	Linda	HOPE	1	9/9/82	Perm	2008/09		5/14/04					No evaluation completed. Date of last eval was 5/14/04
Presley	Deanna	HOPE	3	9/13/93	Perm		Tubbs	4/30/08	1				
Rai	Sumit	HOPE	1	9/3/98	Perm		Tubbs	5/1/08	1		<b></b>	1	
Szabo	Kelly	HOPE	4	8/23/07	Temp 1		Tubbs	5/27/08		1	1	1	
Wolfson	Christine	HOPE	4th and 2nd	8/28/00	Perm		Tubbs	4/25/08	1			1	
VanVooren	Carol	JEFF	Principal	2/20/96								(	Principals not eligible for reimbursement
Hartman	Jane	JEFF	TOSA (Coordinator - IB Program)	8/28/97						1			Coordinators not eligible for reimbursement.
Alper	Robert	JEFF	3	8/28/00	Perm		Van Vooren		1			1	
Alva	Kate	JEFF	3	8/29/96	Perm		Hartman	6/9/08	1	ļ		1	
Amezcua	Irma	JEFF	1	9/3/98	Perm			6/6/08	1	Ļ	<u> </u>	1 1	
Durnan	Christie	JEFF	1	9/3/96	Perm		Hartman	6/13/08	1	<u> </u>		1 1	
Ferreira	Laurel	JEFF	3	9/2/99	Perm	<b></b>	Van Vooren		1 1	<u> </u>	<del>                                     </del>	1 1	
Haeberlein	Christy	JEFF JEFF	5	8/28/97	Perm	<b>!</b>	Hartman Van Vooren	6/9/08	1 1	<del> </del>	<del> </del>	1 - 3	
Horrell Jinich	Eudocia Elizabeth	JEFF	<del>                                     </del>	9/9/89 1/6/97	Perm		Van Vooren Hartman	5/8/08	1 1	ļ	├	1	
Knox	Robin	JEFF	K 2	8/29/96	Perm			5/8/08	+ +	<del> </del>	<del> </del>	+ -	
Nevarez	Karl	JEFF	3	9/6/84	Perm		Van Vooren		+ +	<del> </del>	<del> </del>	1 1	
Ponce	Luis	JEFF	5	8/31/95	Perm			5/8/08	1	<del>                                     </del>		1	
Quinones	Julia	JEFF	KDG	9/26/07	Temp 1	<del> </del>	Van Vooren		<u> </u>	╁	1	1	
Schwend	Deborah	JEFF	1st Grade	8/25/06	Temp 2	<u> </u>	Hartman	6/6/08	1	1	1	+ -	
Sellers	Andrew	JEFF	Psychologist	8/16/07	Temp 1	#5450517F4	Van Vooren		120			1 6	Psychologists not eligible for reimbursement
Tatum	Yolanda	JEFF	l K	8/27/01	Perm		Hartman	5/7/08	1			1	
Teran-Cruz	Maria	JEFF	2	9/3/98	Perm		Van Vooren	5/6/08	1		ļ	1	
Tsutagawa Ward	Michele	JEFF	К	8/29/06	Temp 2		Hartman	6/6/08			1	1	
Villalobos	Nancy	JEFF	1	8/31/95	Perm		Van Vooren	5/9/08	1			1	
Armstrong	Theresa	KELLY	PRINCIPAL	9/4/86			7.5				10.1	(	Principals not eligible for reimbursement
Bentley	Stephanie	KELLY	5	8/27/01	Perm		Amstrong	4/1/08	1		<u> </u>	1 1	
Chang	Susan	KELLY	1	9/26/83	Perm	2010/11		6/21/06				(	No evaluation completed. Date of last eval was 6/21/06. Reimbursed in FY 2005-06.
Gizzi	Michelle	KELLY	2	8/28/00	Perm			5/6/08	1 1	ļ		1	
Jaffe	Jenifer	KELLY	4	8/28/00	Perm			6/2/08	1	ļ	ļ <u>.</u>	1	
Kelleher	Lorelei Leslie	KELLY	2	8/27/04	Perm			4/25/08 4/22/08	1	<del> </del>	<del> </del>	1 1	
LaMontagne Mulvey	Janis	KELLY	K-2	1/28/02 9/7/77	Perm	2010/11	Amstrong	5/30/06	1			1	No evaluation completed. Date of last eval was 5/30/06. Reimbursed in FY 2005-06.
Parrish	Peggy	KELLY	K-1	9/6/84	Perm	2010/11		5/30/06					No evaluation completed. Date of last eval was 5/30/06. Reimbursed in FY 2005-06.
Schofield	Roberta (Ewing)		1	8/27/01	Perm	2010/11	Amstrong	4/15/08	1				No evaluation completed. Date of last eval was 3/30/00. Remibulsed in 11 2003-00.
Smith-Martinez	Tracy	KELLY	School Psychologist	9/3/98	Perm	A. 350, 875		6/6/08		72220		1 6	Psychologists not eligible for reimbursement
Wolfson	Deborah	KELLY	SE - Math / Study Skills	3/13/86	Perm		Amstrong	5/8/08	1	1 220	2500000000	1 1	TOTAL SHOULD BE TOTAL SHOULD BE TOTAL SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD BE SHOULD B
Hess	Ron	MAG	Principal Principal	8/28/00	Perm			5/19/08			1		Principals not eligible for reimbursement
Haines	Lucy	MAG	Dir Curr/Interim Principal				Haines				1		Principals not eligible for reimbursement
Clark	Lisa	MAG	5	10/28/92	Perm			6/6/08	1	Ī .	T	1	
Collins-Cripe	Juanita	MAG	1	8/29/96	Perm			6/6/08	1	I			
Fuentes	Kim	MAG	1	8/26/05	Perm		Amstrong	4/2/08	1			1	
Hall	Julia	MAG	SE - DHH Gr. 1/2	8/27/05	Perm			5/21/08	1			1	
Hein	Wendy	MAG	3	9/1/88	Perm	2012/13		6/6/08	1			1	
Lamb	Elizabeth	MAG	3	9/2/93	Perm	2012/13		6/6/08	1			1	
Libertino	Sandra	MAG	2	8/31/95	Perm	2012/13		6/6/08	1			1	
Roth	Francisca	MAG	3	9/5/90	Perm	2012/13		6/6/08	1	<b></b>		1	
Sanchez	Treda	MAG	1	8/26/05	Perm	2212115	Haines	4/2/08	1			1	
Seelig	Bobette	MAG	3	9/5/85	Perm	2012/13	Haines	6/6/08	1		ļ	1 1	
Sewell	Jackie	MAG	2	9/2/93	Perm	2012/13	Haines	6/6/08	1	<del> </del>	<b>Ļ</b>	1 1	
Sturiale Ahle	Diana	MAG POI	4/5 Principal	9/6/84 8/24/82	Perm	2012/13	Haines	6/5/08	1		ļ	1	
Anie	Stephen Gwenn	POI	Principal 2	9/22/75	Perm	eese tysis le C s.C	Ahle	5/20/08	<u> </u>	1		1 0	Principals not eligible for reimbursement
nualis	Trimeiiii	_ FUI	<u> </u>	PIECIIO	T LAIIII		JAINE .	10/40/00		Ь	1	1 1	I

Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2007-08

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<u>Kev</u>

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									Allo	wable	Evalu	ations	
						10 yrs exp/Eval every 5 yrs							
1 11	F1	orre	OUD IFOT (ODADE LEVE)	Date of		Next Eval	E	Date of				<b>-</b>	
Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Hire		Due Date	Evaluator	Last Eval	Perm	Prob	Temp	Lotal	Comments
Aveni	Peggy	POI	Special Education	8/28/00	Perm		Ahle Ahle	5/20/08 6/1/08	1	<del> </del>	├	1	
Baima Brown	Lane Robert	POI	Teacher - Elementary Teacher - Elementary	8/26/05 8/25/06	Prob 2		Ahle	5/2/08	+	<del>  </del>	<del>  '</del>	<del>                                     </del>	
Bwarie	Norma	POI	2	8/27/01	Perm		Ahle	5/22/08	1	<del>  '</del>	-	1 1	
Gilbert	Melissa	POI	1	8/23/07	Temp 1		Ahle	6/2/08	+	<del>                                     </del>	1 1	1 1	
Haeussinger	Joanne	POI	5	8/26/05	Prob 2		Ahle	6/1/08	1	1	<u> </u>	1	
Hebert	Lillian	POI	Teacher - Elementary	8/26/05	Temp 2		Ahle	6/6/08	1	† <u> </u>	1	1	
Hughes	Denise	POI	1	8/28/97	Perm		Ahle	5/21/08	1			1	
Kistler	Nicole	POI	4	9/8/94	Perm		Ahle	5/13/08	1			1	
Loftis	Nonalee	POI	К	8/31/00	Perm		Ahle	5/23/08	1			1	
Maxon	Blake	POI	4	1/7/02	Perm		Ahle	5/27/08	1			1	
Mehring	Courtney	POI	1	8/23/07	Temp 1	ļ <u>.</u>	Ahie	6/5/08			1	1	
Moersch	Nicole	POI	5	9/13/07	Temp 1	ļ	Ahle	6/1/08		<u> </u>	1	1	
Rowe	Patricia	POI	2	9/7/83	Perm		Ahle	5/20/08	1	1		1	
Shuck	Triesta	POI	1	11/7/05	Prob 2	<del> </del>	Ahle	5/21/08	1	1	1	1	
Trussel	Mike	POI	Teacher - Elementary	8/28/00	Perm		Ahle	6/1/08	1	-		1	
Valenty	Aven	POI	K	8/25/06	Temp 2	<u> </u>	Ahle Ahle	6/5/08	_	_	1	! !	
Williamson Devich	Brooke Robert	PR	1 Principal	8/25/06 7/1/02	Prob 2		Anie	6/4/08		1		1	
Blakely	Anne	PR	4 4	8/23/07	Temp 1		Devich	6/13/08			1	1	Principals not eligible for reimbursement
Cozens	Jamie	PR	3	8/27/01	Perm	<del>                                     </del>	Devich	6/13/08	1	<del>                                     </del>	<u> </u>	1	
Edgerly	Stephanie	PR	2	10/29/07	Temp 1	<u> </u>	Devich	6/13/08	<del></del>	<u> </u>	1	1	
Fogarty	Stephanie	PR	2	8/25/06	Prob 2	<b> </b>	Devich	6/13/08	+	1	<del> </del> '	1	
Glassev	Jennifer	PR	2	8/25/06	Prob 2		Devich	6/12/08	<del></del>	1	<del> </del>	1	
Gold	Amy	PR	Speech Lang, Path	8/23/07	Temp 1	†	1	5/27/08	<del></del>	╁──∸	1	1	
Granich	Noelle	PR	1	8/28/97	Perm		Devich	6/13/08	1	<del> </del>	<del>                                     </del>	1	
Hartman	Ashley	PR	5	4/1/04	Perm		Devich	6/13/08	1			1	
Jordan	Katie	PR	4	3/27/00	Perm		Devich	6/13/08	1			1	
Konieczko	Walter	PR	5	8/25/07	Temp 1		Devich	6/13/08			1	. 1	
Lockman	Meganne	PR	2	10/29/07	Temp 1		Devich	6/13/08			1	1	
McGowan	Margaret	PR	3	8/29/96	Perm		Devich	6/13/08	1			1	
Roberts	Jessica	PR	3	8/27/01	Perm	<u> </u>	Devich	6/13/08	1			1	
Salvaggio	Tamara	PR	1	8/26/02	Perm		Devich	6/13/08	1	ļ	ļ	1	- Linear Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Control Contr
Shira	Shelbi	PR	K - AM/PM	9/3/98	Perm	<u> </u>	Devich	6/15/08	1			1	
Smith-Martinez	Tracy	PR	School Psychologist	9/3/98	Perm		<u> </u>	6/6/08		1.57000		Ç	Psychologists not eligible for reimbursement
Stayton	Jenesa	PR	2	11/1/06	Temp 2	<b>4</b>	Devich	6/13/2008		<u> </u>	1	1 1	
Trenton	Sylvia	PR	K 1	7/1/99	Perm		Devich	6/13/08	1	-	_		
VanHollebeke	Anne	PR	K-AM	8/26/05	Temp 2	1	Devich	6/13/08	+ -	<del> </del>	1	1 1	
Wiggins	Karen Julio "Cesar"	PR VMS	Ass't Principal	9/2/99 8/10/06	Perm		Devich	6/13/08	-				Assistant Delevate de la distribile for reinsbrussmant
Morales Lund	Chad	VMS	Ass't Principal Ass't Principal	8/27/02									Assistant Principals not eligible for reimbursement
Bess	Corev	VMS	6th Grade Science	8/27/02	Temp 1	1	Morales	5/9/08	4		1	1 1	Assistant Principals not eligible for reimbursement
Bitner	Ashley	VMS	Social Studies	8/23/07	Temp 1	<u> </u>	Lund	5/9/08	+	<del> </del>	+ +	ļ	
Dia101	Admoy	V IVIO	Band: Beg / Inter / Adv Orchestra/ Music	0/20/01	Leurb I	<del> </del>	1_010	5,5,55	+	<del>                                     </del>	<del>  '</del>	<del>                                     </del>	
Boer	Amanda	VMS	. Appreciation	8/23/07	Temp 1		Morales	5/9/08	1		1	1	
Cockerham	Jennifer	VMS	Special Education	8/23/07	Temp 1	1	Lund	6/13/08	1	t -	1	1 1	
Congleton	Suzanne	VMS	Gr 7 English - Gr 7 Adv English	8/26/02	Perm		Morales	5/1/08	1	<b></b>	† <del>-</del>	1	
Davidson	Stacy	VMS	Gr 7 Pre-Algebra / Gr 7 Adv Pre Algebra	9/3/98	Perm		Lund	5/5/08	1 1	<del> </del>	<b>†</b>	1 1	
De Wulf	Sue	VMS	Art / Adv Art / 6th (Art)	8/28/00	Perm		Morales	5/9/08	1		1	1	
Dixson	Thomas	VMS	Science Technology / Science 7/8	8/31/88	Perm		Lund	5/9/08	1	1	l .	1	
Endrizzi	Verona	VMS	DHH 2,3	9/9/82	Perm		Morales	5/7/08	1			1	
Fleming	Trish	VMS	Special Ed	8/23/07	Temp 1		Lund	5/12/08			1	1	
Gastauer	Jennifer	VMS	Sci 7: Life Science	8/31/00	Perm		Morales	5/12/08	1			1	

**Carlsbad Unified School District** The Stull Act Program **Certificated Evaluation Log** FY 2007-08



A6.PS

<u>Kev</u>

Unallowable evaluation - not included in the district's claims Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation

Allowable evaluation - change made using additional documentation

Note: Some evaluations were not included in the district's claims, but were allowable.

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									Allo	owable	Evalua	tions	
Last Name	First Name	SITE	SUBJECT/GRADE LEVEL	Date of Hire	Person	10 yrs exp/Eval every 5 yrs Next Eval	Evaluator	Date of Last Eval	Darm	Prob	Tama	Total	Comments
Kim	Henry	VMS	Science 8th Grade	12/2/02	Perm	Due Date	Lund	4/9/08	1	1.00	1 City	TOTAL	Comments
Paynter	Nicole	VMS	Math	8/25/06	Perm		Morales	6/11/08	<del>                                     </del>	<del>                                     </del>	ļ	<u> </u>	
Pineros	Jennifer	VMS	English	8/23/07	Temp 2		Lund	5/8/08	<del>                                     </del>	+	1	· · · · · ·	
Pope	Catherine	VMS	Foundations of Algebra / Algebra 1 GR 8		Perm		Morales	5/12/08	1 1	<del> </del>	† ·		
Salz	Stacy	VMS	Gr 8 Social Studies	8/27/04	Perm		Lund	5/9/08	1 1	1	†	<u> </u>	
Schepps	Catherine	VMS	Core math and SS	8/28/00	Perm		Morales	2007/08	1				
Schulenburg	Olivia	VMS	Music: Show Stopper, Dolce, Ensemble, Viking Singers, Wheel 6 (Musical Theatre)	8/27/01	Perm		Lund	5/5/08	1				
Stover	Catherine	VMS	Pre-Algebra, ELD Found Alg/ ELD Pre Alg, Math 6/7 support	8/28/00	Perm		Morales	5/12/08	Π,				
Tamayo	Vicente	VMS	Social Science	8/25/06	Perm		Lund	4/29/08	1	+	<del> </del> -	ļ <u>-</u>	
Vallen	Lori	VMS	Science	8/23/07	Temp 1		Morales	5/9/08	<del>                                     </del>	<del>                                     </del>	1	-	
Wilkinson	Amber	VMS	Psych	8/16/07	Prob 1		Lund	5/9/08				(	Psychologists not eligible for reimbursement
		1	**************************************		1			1	159	12	36		A6.5
					Less nu	mber of Cate	gorical/Grant	teachers iden	tified by the	he distr	ict	(6	
		1						1	Π		l	201	

A.6.4 page 1/4

**Carlsbad Unified School District** The Stull Act Program Certificated Evaluation Log FY 2008-09



A.5.34

Unallowable evaluation - not included in the district's claims . Unallowable evaluation - included in the district's claims

Unaflowable evaluation - change made using additional documentation Allowable evaluation - change made using additional documentation

									Alic	owable	Evaluat	ions	
						Current					T		
<b>-</b>	٠	Class	۵	t a www.			Court Trees	F b	<b> </b>	In		L	
FullName	Site	Description	Status	Job Title	Hire Date	Eval Recd	Eval Type	Evaluator	Perm	Prob	remp	lota	Comments
Alexander, John D Allen, Terry L	CHS	Certificated Certificated	Permanent	Teacher - General Ed Teacher - General Ed	9/3/92 8/30/96	05/12/09		Stanchi, Margaret A Morales, Julio C	H	1	-	+ ;	
Anderson, Ronald A	CVA	Certificated		Teacher - General Ed	2/3/03	05/06/09	2 Year-Perm	Worales, Julio C	н—	11	+	+ ;	
Backensto, Karen S	CHE	Certificated		Teacher - General Ed	8/29/96	05/12/09		Harden, Leslie	ш	1	1	+ ;	Harrison Harrison
Bentley, Patsy G	CHS	Certificated		Counselor	10/1/90	05/12/09		Stanchi, Margaret A	1 337	1 3888	0	<del>  '</del>	Counselors not eligible for reimbursement
Bess, Corey H	VMS	Certificated		Teacher - General Ed	8/23/07	05/11/09	1 Year-Prob			1		1	Cool isoloto not engine to textibuladement
Billingsley, Donna M	PAC	Certificated		Teacher - General Ed	9/2/99	06/12/09		Devich, Robert A	Η .	<del>1 '</del>	<u>'</u>	1 1	
Bloomquist, Shauna	PAC	Certificated		Teacher - General Ed	8/28/97	06/12/09		Devich, Robert A	Η -	1	<del>                                     </del>	1 1	
Brisebois, Frances (Beth) B	BV	Certificated	Permanent		9/6/72	05/07/09	2 Year-Perm		H	1	<del>                                     </del>	1 1	
Browne, Lori A	VMS	Certificated	Permanent		8/27/01	05/09/09		Morales, Julio C	H -	1		1 1	
Bullard, Mariene	CHE	Certificated	Permanent			05/12/09		Harden, Leslie	Η -	1		1	
Burda, Jan L	AOE	Certificated	Permanent		9/3/87	05/06/09	5 Year-Perm			1		1	
Burns, Kelley S	VMS	Certificated	Permanent	Teacher - General Ed	2/3/86	05/11/09	5 Year-Perm			1		1	
Byrne, Arlette M	VMS	Certificated	Permanent	Teacher - RWL	9/30/92	05/12/09	5 Year-Perm	Morales, Julio C	H	1		1	
Byrne, Arlette M	VMS	Certificated	Permanent	Teacher - RWL - CAT	9/30/92	05/12/09	5 Year-Perm	Morales, Julio C		4 3 4		0	Already counted
Carlson, Barbara A	AOE	Certificated	Permanent		8/27/01	05/01/09	2 Year-Perm	Huesing, Kimberly A		1	T	1	
Carr, Rodney E	VMS	Certificated	Permanent	Library Media Specialist	11/7/01	05/12/09	2 Year-Perm	Morales, Julio C				C	Already counted
				Teacher - Split									
Carr, Rodney E	VMS	Certificated	Permanent	Assignment	11/7/01	05/12/09	2 Year-Perm	Morales, Julio C		1		1	
Castillo, Susan E	BV	Certificated	Permanent	Teacher - General Ed	2/6/84	05/11/09	2 Year-Perm	Howard, Tina		1		1	
Castro, Anthony	CVA	Certificated	Permanent	Teacher - General Ed	11/3/03	05/12/09	2 Year-Perm			1		1	
Chavez, N. Yvonne	JEFF	Certificated	Permanent	Teacher - General Ed	8/28/00	05/12/09	2 Year-Perm			1		1	
Co, Brian J	CVA	Certificated	Permanent	Teacher - General Ed	9/8/04	05/12/09	2 Year-Perm	Holley, Norman 'Keith' K	<u> </u>	1		1	
				Special Ed Teacher -	1			1		I		1	
Cockerham, Jennifer N	VMS	Certificated	Permanent	Mild/Moderate	8/23/07	05/11/09	1 Year-Prob	Morales, Julio C		1		1	
Cotter, Ashley L	PAC	Certificated	Permanent	Teacher - General Ed	8/26/05	06/11/09	2 Year-Perm	Devich, Robert A	<u> </u>	1]	1	1	
Dearie, Kurt R	CHS	Certificated	Permanent	Teacher - General Ed	9/6/84	05/22/09	2 Year-Perm			1]	<u> </u>	1 1	
Dodaro, Mark R	AOM	Certificated	Permanent	Teacher - General Ed	9/6/84	05/12/09	2 Year-Perm		<u> </u>	1	<del>                                     </del>	1 1	
Doncouse, Estella G	JEFF	Certificated	Permanent	Teacher - General Ed	9/8/94	05/12/09		Van Vooren, Carol L	<u> </u>	1	1	1 1	
Ecker, Ashley C	VMS	Certificated	Permanent	Teacher - General Ed	8/23/07	05/06/09		Morales, Julio C	0.00	1 1		1	
Fahlstrom, Norma C	CHS	Certificated	Permanent	Counselor	2/28/78	05/12/09		Stanchi, Margaret A	-		<u> </u>	<u> </u>	Counselors not eligible for reimbursement
Faure-Gault, Livia E	JEFF	Certificated	Permanent Permanent	Teacher - General Ed Teacher - General Ed	8/29/96 9/2/93	06/15/09 05/06/09		Van Vooren, Carol L Huesing, Kimberly A	Н—	1	┼	+ ;	
Fearn, Martha K	AOE	Certificated	Permanent	Special Ed Teacher	9/2/93	05/06/09	z real-reilli	Huesing, Kimberry A	-	-	+ -	<del>  '</del>	
Ferrara, Linda M	KEL	Certificated	Permanent	Speech/Language	8/28/00	05/11/09	2 Voor-Porm	Armstrong, Theresa M	Ш.	. [		4	
Foster, Jeffrey	AOE	Certificated		Teacher - General Ed	9/8/94	05/07/09		Huesing, Kimberly A	H	1 -	+	+ ;	
François, Cathy V	CHS	Certificated		Teacher - ROP	9/10/84	05/12/09	2 Year-Perm					l i	Already counted
Trancols, Cally V	101,0	Continuated	1 Officiality	Teacher - Split	0110101	00/14/00	2 100 1 000				1		I I I I I I I I I I I I I I I I I I I
François, Cathy V	снѕ	Certificated	Permanent	Assignment	9/10/84	05/12/09	2 Year-Perm		.	1	1	1 1	
Fuller, Jessica P	POI	Certificated		Teacher - General Ed	9/10/03	05/12/09		Ahle, Stephen J		1		1	
				Special Ed Teacher -					1	1	1	1	
Gaccetta, Judith A	СНМ	Certificated	Permanent	Mild/Moderate	9/2/93	05/06/09	2 Year-Perm	Howard, Tina	Ш ·	1	L	1	
Gallego, Luisa	PAC	Certificated	Permanent	Teacher - General Ed	9/5/85	06/12/09		Devich, Robert A		1		1	
Gerges, Nevine I	CHS	Certificated	Permanent		8/27/04	05/05/09		Stanchi, Margaret A				1 0	Psychologists not eligible for reimbursement
Gledhill-Mash, Sarah L	DO	Certificated		Teacher - ELD Resource	8/28/00	06/18/09		Haines Dechairo, Lucy		1		1	
Gnade, Arlene	JEFF	Certificated	Permanent	Teacher - General Ed	1/25/95	05/05/09	2 Year-Perm	Van Vooren, Carol L		1		1	
				Special Ed Teacher -						1			
Granberg, Alicia	PAC	Certificated	Permanent	Mild/Moderate	8/25/06	06/12/09		Devich, Robert A	Ц	1	_	1 1	
Guillen, Kimberly S	AOE	Certificated	Permanent	Teacher - General Ed	8/27/01	05/01/09		Huesing, Kimberly A		1	1	1	
Gunner, Caroline	CHE	Certificated	Permanent	Teacher - General Ed	9/4/91	05/11/09		Harden, Leslie	Ц	1	1	1	
Hall, Monica H	CHS	Certificated	Permanent	Teacher - General Ed	9/6/79	05/12/09		Stanchi, Margaret A	Н	1	1	1 1	
Hampton, Anne M	PAC	Certificated	Permanent	Teacher - General Ed	1/3/00	06/11/09		Devich, Robert A	<b> </b>	1	ļ	11	
Harrison, Christine M	AOE	Certificated		Teacher - General Ed	8/21/08	04/03/09		Huesing, Kimberly A	Н		4	<del>  1</del>	
Heath, Joseph D	AOM	Certificated		Teacher - General Ed	8/28/97	05/12/09		Millikin, Carolyn	H	11	<b></b>	<del>                                     </del>	
Heberer, Teresa A	JEFF	Certificated		Teacher - General Ed	1/2/01	05/06/09		Tubbs, Richard L	H	11	<b></b>	<del>                                     </del>	
Hendricks, Dale R	CHS	Certificated		Teacher - General Ed	8/29/96	06/18/08		Stanchi, Margaret A		1	1	1 1	
Heritage, Kathleen S	CSA	Certificated	Permanent	Teacher - General Ed	3/5/92	05/00/00		Holley, Norman 'Keith' K		4	P. 10. 44	1 4	No evaluation received by the district.
Hill, Keatra A	VMS	Certificated	Permanent	Teacher - General Ed	9/2/99 8/25/06	05/08/09 05/13/09		Morales, Julio C Ahle, Stephen J	Η	1	1	+ -	
Hirschkoff, Heather	POI	Certificated	Permanent	Teacher - General Ed Special Ed Teacher -	0/23/00	03/13/09	z rear-reim	Ame, Stephell J	Η	+	+	+-'	
Hovis, Christi M	АОМ	Certificated	Pormanest	Mild/Moderate	9/8/94	05/12/09	2 Year-Perm	Millikin, Carolyn	]] .	4	1	4	
I IOVIO, CITIISTI IVI	IVOIN	Toermicated	r ennanent	INITIO/INIOUGI ALG	1010194	00/12/03	IE TOUTH BITT	Iraniani, Carolyti	Ц	<u>'</u>		اـــــــــــــــــــــــــــــــــــــ	<u> </u>

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**Carlsbad Unified School District** The Stull Act Program Certificated Evaluation Log FY 2008-09



A.5.34

Unallowable evaluation - not included in the district's claims Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation Allowable evaluation - change made using additional documentation

					•				Alic	wable	Evaluati	ons	
				N									
		Class			100	Current					L	La revi	
FullName	Site	Description	Status	Job Title	Hire Date		Eval Type	Evaluator	Perm	Prob	Temp	Total	Comments
Irwin, Cynthia	AOE	Certificated	Permanent		8/29/01	05/11/09	2 Year-Perm	Huesing, Kimberly A	1	1		1	
Jacobs Manay 6	D) /	C	D	Special Ed Teacher -	0/0/00	05/00/00	0 V D	Daward Ties	Ш.		i		
Jacobs, Nancy S Jordan, Twanna L	BV	Certificated Certificated	Permanent Permanent		9/2/99	05/08/09	2 Year-Perm 2 Year-Perm		H	11		1 1	
Kimball, Marianne	VMS	Certificated		Teacher on Paid LOA	9/2/93	05/22/09	2 Year-Perm	Starichi, Margaret A	<del> </del>	:		1	
Kistler, Karl	CHS	Certificated		Teacher - General Ed	1/1/93	05/12/09		Stanchi, Margaret A	H	1			
Ristier, Rair	Uno	Certificated	remanent	Special Ed Teacher -	1/1/93	03/11/09	Z Teal-Fellii	Staricili, Walgaret A	<del> </del>	4		-	
Kolden, Rosemary C	AOE	Certificated	Permanent		8/23/07	05/05/09	1 Year-Prob	Huesing, Kimberly A	H	1		1	
Konieczko, Walter R	PAC	Certificated	Permanent		8/23/07	06/11/09		Devich, Robert A	<del>                                     </del>	1		1	
Kopp, Christine P	JEFF	Certificated		Teacher - General Ed	8/27/01	05/16/09		Van Vooren, Carol L		1		1	
1 3				Special Ed Teacher -				20 A 20 20 A 10 A 10 A	. 33		2		
Krager, Jessica B	BV	Certificated	Permanent	Preschool	8/23/07	05/11/09	1 Year-Prob	Howard, Tina				0	Preschool teachers are not eligible for reimbursement
Kramer, Dawn M	KEL	Certificated	Permanent	Teacher - General Ed	8/25/06	05/12/09	2 Year-Perm	Armstrong, Theresa M		1		1	
Kunkel, Christine M	CHE	Certificated		Teacher - General Ed	9/18/06	05/11/09	2 Year-Perm			1		1	
Langarica, Maria L	JEFF	Certificated		Teacher - General Ed	8/27/01	05/12/09	2 Year-Perm			1		1	
Larios, Ana	BV	Certificated		Teacher - General Ed	8/27/01	05/08/09	2 Year-Perm	Howard, Tina		1		1	
Laski, Linda J	BV	Certificated		Teacher - General Ed	9/2/93	05/08/09	2 Year-Perm	Howard, Tina		1		1	
Lewis, Mia C	VMS	Certificated	Permanent		8/28/00	05/07/09	2 Year-Perm	Morales, Julio C	<u> </u>	<del>'</del>		1	'
Little, Shane	BV	Certificated		Teacher - General Ed	9/5/85	05/11/09	2 Year-Perm			!		1	
Lupica, Melanie K	PAC	Certificated	Permanent		9/2/99	06/11/09	2 Year-Perm	Devich, Robert A	_	1		1	
Lyon, Roderick M	CHE	Certificated	Permanent		8/27/04	05/11/09	2 Year-Perm	Howard, Tina		1		1	
MacPherson, Margaret	BV	Certificated		Teacher - General Ed	11/23/92	05/11/09	2 Year-Perm			1			
Marks, Tracy A	JEFF	Certificated	Permanent	Teacher - General Ed Special Ed Teacher -	8/28/97	05/11/09	2 Year-Perm	Armstrong, Theresa M	-	<del>' </del>	ļ	1	
Marner, Rory E	CHE	Certificated	Pormanont	Mild/Moderate	9/8/94	05/12/09	2 Year-Perm	Harden, Leslie		, l		٦ .	
Massey, Georgellen	CHS	Certificated		Psychologist Psychologist	8/25/06	05/06/09	2 Year-Perm		1	'		0	Psychologists not eligible for reimbursement
Mehring, Courtney M	POI	Certificated	Permanent		8/23/07	05/12/09	1 Year-Prob	Ahle, Stephen J	1.0000000	1		1	- Sychologists not eligible for relinbursoment
Merritt. Rae M	JEFF	Certificated		Teacher - General Ed	8/29/96	05/05/09		Van Vooren, Carol L	+	<del>. </del>		1	
Mitchell, Chad J	CHM	Certificated		Teacher - General Ed	2/26/98	05/11/09		Hancock, Catina S	<b>—</b>	<u> </u>		1	
Mulvey Jr, Arthur F	VMS	Certificated		Teacher - General Ed	9/2/99	05/11/09		Morales, Julio C	_	il		1	
	1			Special Ed Teacher-	1								
Neptune, Susan E	CHS	Certificated	Permanent	RWL	12/1/80	05/12/09	5 Year-Perm	Stanchi, Margaret A		1		1	
Nicholas, Susan L	AOE	Certificated	Permanent	Teacher - General Ed	9/3/92	05/08/09	2 Year-Perm	Huesing, Kimberly A		1		1	
				Special Ed Teacher -				-					
Nikodym, Deanna L	BV	Certificated	Permanent		8/28/00	05/08/09		Howard, Tina		1		1	
Northridge, Mary N	BV	Certificated		Teacher - General Ed	9/6/00	05/08/09		Howard, Tina		1		1	
Norton, Gabie E	СНМ	Certificated	Permanent	Teacher - General Ed	8/27/04	05/12/09	2 Year-Perm	Hancock, Catina S		1		1	
l	1		l_         .	Special Ed Teacher -	1			l., .,		.			
Nugent, Therese M	JEFF	Certificated	Permanent	Speech/Language	12/13/00	05/06/09		Van Vooren, Carol L		1		1	
Oakley, Stephen M O'Briant, Ross D	VMS	Certificated		Teacher - General Ed	3/14/02 8/27/04	05/09/09		Stanchi, Margaret A Morales, Julio C				0	No evaluation received by the district.
Ogden, James (Scott) S	CHS	Certificated Certificated		Teacher - General Ed Teacher - General Ed	8/28/00	05/09/09		Stanchi, Margaret A	-	1			
Oguen, James (Scott) S	una	Ceruncated	remanent	Special Ed Teacher -	0/20/00		2 1001-10111	Staricili, Maryaret A	+			u	No evaluation received by the district.
Olsen, Gwyneth	MAG	Certificated	Permanent	DHH	9/9/98	10.00	2 Year-Perm	Hines, James C				0	No evaluation received by the district.
Ortman, Juanita	CHS	Certificated		Teacher - General Ed	8/25/03			Stanchi, Margaret A	1		-		No evaluation received by the district.
Ordinari, odarita	UNIO	Continuated	i cirranom	Special Ed Teacher -	S/2S/GG		2 1021 1 01111	Ctalities, Margaret A					INO EVAIDATION FECEIVED BY THE DISTRICT.
Orzechowski, Rosemarie M	BV	Certificated	Permanent	Preschool	8/23/07	05/07/09	1 Year-Prob	Howard, Tina				n	Preschool teachers are not eligible for reimbursement
	1			Teacher - Split	,,==,,				100			<b>-</b>	
Owen, Christy E	CHS	Certificated	Permanent	Assignment	8/27/04	7	2 Year-Perm	Stanchi, Margaret A		4000		0	No evaluation received by the district
				Teacher - Split					10.00				
Owen, Christy E	снѕ	Certificated	Permanent	Assignment	8/27/04		2 Year-Perm	Stanchi, Margaret A		1		0	No evaluation received by the district.
Palenscar, Thomas Y	СНМ	Certificated	Permanent	Teacher - General Ed	10/3/74	1 42 2 1	5 Year-Perm	Hancock, Catina S	(2) ES				No evaluation received by the district.
Palmer, Joey L	POI	Certificated	Permanent		2/24/98	05/12/09		Ahle, Stephen J				1	
Papera, Lisa M	CHS	Certificated	Permanent		2/6/95	. v. 1000		Stanchi, Margaret A				0	No evaluation received by the district.
Park, Valerie C	CHS	Certificated	Permanent		8/25/03		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district
	i			Special Ed Teacher -	1		1						
Parker, William A	VMS	Certificated		Mild/Moderate	9/5/85	05/11/09		Morales, Julio C	1 1	<u> </u>		a 1	
Parr, Christine	CHS	Certificated		Teacher - General Ed	9/5/90	11.6		Stanchi, Margaret A	4			0	No evaluation received by the district
Peabody, Janet L	AOM	Certificated	Permanent		2/3/97	05/12/09		Millikin, Carolyn	1	<u> </u>		1	
Peacock, Lorianne	CHS	Certificated	Permanent		8/29/96			Stanchi, Margaret A	4	graneus <u>a</u>			No evaluation received by the district.
Peer, Eileen M	JEFF	Certificated	Permanent		8/29/96	05/28/09		Van Vooren, Carol L	1			1	
Penrod, Susan H	CHS	Certificated	Permanent	Teacher - General Ed	8/25/06		2 Year-Perm	Stanchi, Margaret A	1			0	No evaluation received by the district.

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Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2008-09



A6.PS

A,5,34 Una

Unallowable evaluation - not included in the district's claims
Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation Allowable evaluation - change made using additional documentation

									Allowable Evaluations		tions		
		A1		The line									
Collins		Class	Chabia	Job Title	Hire Date	Current Eval Recd	Eval Type	Evaluator	Perm	Prob	Temp	Total	Comments
FullName	Site	Description Certificated	Status Permanent		8/26/05	Eval Necu	2 Year-Perm		rem	FIOD	, i emb		No evaluation received by the district.
Philippe, Amanda A Pierini, Karissa A	CHM	Certificated	Permanen		8/25/06		2 Year-Perm		-				No evaluation received by the district.
Pounds, Judith A	PAC	Certificated	Permanent		11/1/05	06/12/09	2 Year-Perm		-	1		1	Pro Braidation received by the district.
Primer, Edward D	CHS	Certificated	Permanent		9/3/98	05/11/09	2 Year-Perm		H	1	<del></del>	<del>                                     </del>	
Proctor, Carleen M	VMS	Certificated	Permanent		8/26/02	05/11/09	2 Year-Perm		<del>                                     </del>	1	+	<del>                                     </del>	
Purser, Joseph R	CHM	Certificated	Permanent		9/7/06	05/12/09	2 Year-Perm			1		1	
Raymundo, Meredith	CHE	Certificated		Teacher - General Ed	8/27/01	05/12/09	2 Year-Perm			1		1	
Redfield, Julia A	CVA	Certificated	Permanent		1/29/07	05/11/09	1 Year-Prob	Holley, Norman 'Keith' K				0	Counselors not eligible for reimbursement
Riccitelli, Jeffrey S	CHS	Certificated	Permanent	Teacher - General Ed	6/18/93	05/11/09	2 Year-Perm			1		1	
Robertson, Thomas E	CHS	Certificated	Permanent	Teacher - General Ed	8/28/69	06/13/08	2 Year-Perm		4.5			0	Biannual teacher, date of last eval was 6/13/08. Reimbursed in FY 2007-08.
Russell, Monique M	AOE	Certificated	Permanent		8/28/00	05/05/09	2 Year-Perm		Ш	1		1	
Sabala, Kelly A	VMS	Certificated	Permanent		8/25/03	05/06/09	2 Year-Perm		Ц	1		1	
Sandoval, Esmeralda C	CHM	Certificated	Permanent		8/31/95	05/12/09	2 Year-Perm	Hancock, Catina S	ļ	1		1	
	1.			Special Ed Teacher -			l	1					
Schmitz, Cynthia A	CHE	Certificated	Permanent		8/27/01	05/12/09		Harden, Leslie	Н	1		1	
Schroh, Melony P	VMS	Certificated	Permanent		8/31/00	05/11/09		Morales, Julio C	Н —	4		- 0	Counselors not eligible for reimbursement
Scott, Linda K	CHS	Certificated	Permanent		9/2/93	05/12/09		Stanchi, Margaret A	H		+	$+-\frac{1}{2}$	
Serafin, Jason T	JEFF	Certificated	Permanent		8/27/01	05/06/09		Van Vooren, Carol L	H	1		1	
Severino, Julie A	AOE	Certificated	Permanent		8/27/01	05/05/09 06/10/09		Huesing, Kimberly A Devich, Robert A	H	1	<del>- </del>	+ 1	
Shearer, Kathleen	PAC	Certificated	Permanent	Teacher - General Ed Teacher - General Ed -	9/1/00	00/10/09	z rear-reim	Devicii, nobert A	H	4	+	<u>'</u>	
Shepard, Marilyn J	JEFF	Certificated	Permanent		9/4/86	05/12/09	2 Voor-Porm	Van Vooren, Carol L	П	1		1	
	PAC	Certificated	Permanent		8/28/00	06/12/09		Devich, Robert A	H	1	+	+ +	
Slattery, Patricia F	PAC	Certificated	Permanent	Special Ed Teacher -	0/20/00	00/12/09	2 Year-Feili	Devicii, Nobelt A	$\vdash$	+-	+	+ '	
Slovin, Susan G	AOE	Certificated	Permanent		9/8/76	05/05/09	2 Year-Perm	Huesing, Kimberly A		1		1	
Smith, Anne L	JEFF	Certificated		Teacher - General Ed	9/7/99	05/17/09		Van Vooren, Carol L	H	1		1	
Smith, BreeAnn M	VMS	Certificated	Permanent		8/26/05	05/07/09		Morales, Julio C	H	1	+	1 1	
Smith. Buthle	VMS	Certificated	Permanent		9/3/98	05/13/09		Morales, Julio C	H	1		1	
Spanier, Jeffrey R	CHS	Certificated		Teacher - General Ed	9/3/98	05/22/09		Stanchi, Margaret A	<del>                                     </del>	1		1	
opanion, como y r	101.10			Teacher - General Ed -	-			<u> </u>					
Stencil, Karen M	JEFF	Certificated	Permanent		9/3/87	05/17/09	2 Year-Perm	Van Vooren, Carol L		1		1	
Sterett, Norma	JEFF	Certificated	Permanent	Teacher - General Ed	8/29/96	05/12/09	2 Year-Perm	Van Vooren, Carol L		1		1	
Stipe, Holly L	СНМ	Certificated	Permanent	Teacher - General Ed	8/26/05		2 Year-Perm	Hancock, Catina S				0	No evaluation received by the district.
				Special Ed Teacher -								· ·	
Stremel, Suzanne	PAC	Certificated	Permanent		11/11/03	06/12/09		Devich, Robert A	Ц	1		1	
Taylor, Kevin	BV	Certificated		Teacher - General Ed	8/29/96	05/08/09		Howard, Tina	<b></b>	1		1 1	
Tessier, Margaret C	CHS	Certificated	Permanent	Teacher - General Ed	8/25/06	05/12/09		Stanchi, Margaret A	Ц	1		1	
Thomas, Shelley M	JEFF	Certificated	Permanent		9/2/99	05/17/09		Van Vooren, Carol L	<b> </b>	1	ļ	1 1	
Tibbels, Mary Jean J	VMS	Certificated	Permanent		10/3/83	05/11/09		Morales, Julio C	<del></del>	1		1	
Tinnerstet, Gaylor	AOE	Certificated	Permanent		9/5/85	05/07/09		Huesing, Kimberly A	ш	1	+	1 1	
Tipton, Joseph E	CHS	Certificated	Permanent		9/5/85	05/22/09		Stanchi, Margaret A	н—	1	+-	<del>_</del>	
	JEFF	Certificated	Permanent		8/29/06	04/22/09		Van Vooren, Carol L	$\vdash$	1	+	1 1	
Uribe, Jennifer	AOE	Certificated	Permanent		11/10/94 9/5/90	05/05/09		Huesing, Kimberly A O'Connell, Suzanne M	H	4			
Vallone, Joyce J	INST	Certificated	Permanent		9/5/90	1		Howard, Tina	H	-	+		No evaluation received by the district.  No evaluation received by the district.
Valverde, Rita	CHM	Certificated Certificated	Permanent Permanent		10/19/88	05/08/09		Hancock, Catina S		1	14 10 10 10 10	1 1	
Vance, Jennie J	AOE	Certificated	Permanent		9/5/90	05/08/09		Huesing, Kimberly A	H	1	+	1 1	
Vasquez, Cynthia L Weatherall, Ellen	AOE	Certificated	Permanent		9/18/84	05/09/09		Huesing, Kimberly A		1		-	
Wells-Tejada, Rosemary R	VMS	Certificated	Permanent		9/1/89	05/12/09		Morales, Julio C		1		1	
Wilkinson, Amber D	VMS	Certificated	Permanent		8/16/07	05/12/09		Morales, Julio C	P TORY	+	1 1000	<u> </u>	Psychologists not eligible for reimbursement
THROUGH, PERMET U	A IAI G	Opi unbated	r emanelit	Special Ed Teacher -	G 10/01	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1.00-1.00		H	-		1 -	The state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the s
Wong, Shirley A	CHS	Certificated	Permanent		8/29/96	05/12/09	2 Year-Perm	Stanchi, Margaret A	H	1		1	
rrong, omnoy A	10110	Continuated	, cimanent	Special Ed Teacher -	3,20,00	-5/.2/00	1		H	1	1	Τ.	
Yates, Dana M	JEFF	Certificated	Permanent		11/29/99	05/05/09	2 Year-Perm	Tubbs, Richard L	H	1		1 1	
. 2.00, 2010 11			- Cimanoni	Special Ed Teacher -	1,7=3,5			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	1 483	7	1.330.5		
Simpson, Caren A	MAG	Certificated	Prob 1	Adaptive P.E	3/9/09	1	1 Year-Prob	Kramer, J. Bruce	N		1	0	No evaluation received by the district.
	T	1	1	Special Ed Teacher -					II			T	
Blehr, Devon R	KEL	Certificated	Prob 2	Moderate/Severe	1/7/08	05/11/09	1 Year-Prob	Armstrong, Theresa M		1	1	] 1	<u> </u>
		1	1	Special Ed Teacher -					П	1		1	
Levitt, Amanda L	BV	Certificated	Prob 2	Preschool	12/17/07	05/07/09	1 Year-Prob	Howard, Tina	Ц	1	1	0	Preschool teachers are not eligible for reimbursement
	T			Special Ed Teacher -									
₋upu, Kelley S	CHE	Certificated	Prob 2	Moderate/Severe	8/21/08	05/11/09	Id Vone Deah	Hancock, Catina S	11	1 .	4 l	1 1	1

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Carlsbad Unified School District The Stull Act Program Certificated Evaluation Log FY 2008-09



**▲** A.5.34

Unallowable evaluation - not included in the district's claims

Unallowable evaluation - included in the district's claims

Unallowable evaluation - change made using additional documentation.

Allowable evaluation - change made using additional documentation.

C									Alic	eldswo	Evaluat	ions	
		Class				Current							
FullName	Site	Description	Status	Job Title	Mine Boss	Eval Recd	l		11	L.	L	L	
Amatore, Nina	CHM	Certificated	Temp	Teacher - General Ed	3/12/08	05/12/09	Eval Type	Evaluator Hancock, Catina S	Perm	Prob	Temp	Total	Comments
Bentley, Ryan D	MAG	Certificated	Temp	Teacher - General Ed	8/21/08	05/01/09				<del></del>	1	1	
Boyer, Amy M	CHE	Certificated	Temp	Teacher - General Ed	11/10/08	05/01/09		Hines, James C Harden, Leslie	Н—	<del></del>	1 1		
Brown, Darcy M	AOE	Certificated	Temp	Teacher - General Ed	9/21/08	05/08/09		Huesing, Kimberly A	<del>  </del>	+	1	1 1	
Cann, David B	KEL	Certificated	Temp	Teacher - General Ed	8/21/08	05/08/09		Armstrong, Theresa M	╫	+		1	
Carrie D		Costinicated	Tienip	Special Ed Teacher -	0/21/00	103/06/09	i real-reimp	Amstrong, meresa w	-	+	<del>  '</del>	'	
Cate, Elisa	CHS	Certificated	Temp	Moderate/Severe	8/21/08	03/13/09	1 Year-Temp	Stanchi, Margaret A			١ ,	۱ ،	
Cervantes, Jennifer E	KEL	Certificated	Temp	Teacher - General Ed	8/21/08	05/11/09		Armstrong, Theresa M	++⋯—	+	<del>                                     </del>	<del>                                     </del>	
Coulter, Caitlin M	MAG	Certificated	Temp	Teacher - General Ed	11/10/08	05/04/09		Hines, James C	+	<del></del>	1		
De Anda, Corie L	DO	Certificated	Temp	Project Specialist	9/2/03	06/18/09	1 Year-Temp		<del>                                     </del>	+	1	1	
Drake, Maya C	CHE	Certificated	Temp	Teacher - General Ed	8/21/08	05/11/09		Harden, Leslie	11	<del>                                     </del>	1	1	
Edgerly, Stefan	PAC	Certificated	Temp	Teacher - General Ed	8/21/08	05/12/09		Devich, Robert A	tt	+	1	1	
Eslinger, Megan E	CHS	Certificated	Temp	Teacher - General Ed	3/19/09			Stanchi, Margaret A				0	No evaluation received by the district.
				Special Ed Teacher -					11			•	The state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the s
Fleming, Trish L	VMS	Certificated	Temp	Mild/Moderate	8/23/07	05/11/09	1 Year-Temp	Morales, Julio C	11	1	1 1	l 1	
				Special Ed Teacher -	İ				!!	1			
Gault, Christina E	AOM	Certificated	Temp	Moderate/Severe	8/21/08	05/12/09	1 Year-Temp	Millikin, Carolyn	H		1	1 1	
Gilbert, Melissa M	POI	Certificated	Temp	Teacher - General Ed	8/23/07	05/12/09	1 Year-Temp	Ahle, Stephen J	ii –	1	1	1	
		ŀ		Teacher - General Ed -			1		<del>                                     </del>	1	<u> </u>		
Green, SueMarie	CHM	Certificated	Temp	CAT	3/11/09	06/29/09	1 Year-Temp	Hancock, Catina S	П	1	1	1	· ·
				Teacher - Split					11				
Jimenez, Joe A	CHS	Certificated	Temp	Assignment	8/21/08	03/13/09		Stanchi, Margaret A	Ш	.1	1	1	
Jimenez, Joe A	CHS	Certificated	Temp	Teacher - ROP	8/21/08	03/13/09	1 Year-Temp	Stanchi, Margaret A				0	Already counted
King, Carol	CHS	Certificated	Temp	Teacher - ROP	8/23/07	03/13/09	1 Year-Temp	Stanchi, Margaret A		1	1	1	
			1	Teacher - Split		A							
King, Carol	CHS	Certificated	Temp	Assignment	8/23/07	03/13/09		Stanchi, Margaret A				0	Already counted
King, Krista L	CHS	Certificated	Temp	Teacher - ROP	8/21/08	03/13/09	1 Year-Temp	Stanchi, Margaret A			1	1	
				Teacher - Split		3.458			П				
King, Krista L	CHS	Certificated	Temp	Assignment	8/21/08	03/13/09	1 Year-Temp	Stanchi, Margaret A	1			0	Already counted
			1	Special Ed Teacher -			1.0						
Labrum, Steven C	VMS	Certificated	Temp	Mild/Moderate	8/31/09			Morales, Julio C				0	No evaluation received by the district.
Langen, Patricia A	CHE	Certificated	Temp	Teacher - General Ed	8/23/07	05/11/09	1 Year-Temp	Harden, Leslie	<u> </u>		1	1	
		l	I_	Special Ed Teacher -	1		l	L					
Lee, Joyce C	JEFF	Certificated	Temp	Mild/Moderate	8/21/08	05/08/09	1 Year-Temp	Van Vooren, Carol L			1	1	
			<b>L</b>	Special Ed Teacher -	1				11				
Lyon, Casey	CHS	Certificated	Temp	Mild/Moderate	8/31/09			Stanchi, Margaret A	Ш	0.000		0	No evaluation received by the district.
McClelland, Jaikour S Moersch. Nicole C	MAG	Certificated	Temp	Teacher - General Ed	8/21/08	05/06/09		Hines, James C	H		1	1	
Moersch, Nicole C Monroe, Arlene	CVA	Certificated	Temp	Teacher - General Ed	9/7/07	05/12/09		Ahle, Stephen J	<b></b>		1	1	
		Certificated	Temp	Teacher - General Ed	8/25/06	05/12/09		Holley, Norman 'Keith' K	<b></b>		1	1	
Monroe, Arlene Payne, Linda M	CVA VMS	Certificated	Temp	6/5th -Position-CAT	8/25/06	05/12/09		Holley, Norman 'Keith' K				0	Already counted
-ayne, Linda M	VMS	Certificated	Temp	Teacher - General Ed	8/21/08	05/11/09	1 Year-Temp	Morales, Julio C			1	1	•
Perry, Barbara	BV	Certificated	<b> </b>	Special Ed Teacher -				164	H				
reny, parbara	ITINER	Gerandated	Temp	Preschool	10/13/08	05/11/09	1 Year-Temp	Howard, Tina	<b></b>			0	Preschool teachers are not eligible for reimbursement
Pike, Jo Ellen	ANT	Certificated	Temo	Special Ed Teacher - Mild/Moderate									
TRB, JO CHEN	AM	Ceruncated	төттр		8/31/09		1 Year-Temp	Kramer, J. Bruce			100	. 0	No evaluation received by the district.
Policastri, Shelby R	CHE	Certificated	Tomo	Special Ed Teacher - Mild/Moderate	10/14/00	05/40/00	4 Vant Ta	Hardon I oolio	П				
Rozansky, Julie L	AOE	Certificated	Temp	Teacher - General Ed	10/14/08	05/12/09		Harden, Leslie	Н	-	1	1	
Ryan, Suzy	VMS	Certificated	Temp	Teacher - General Ed	2/17/09 8/21/08	05/01/09		Huesing, Kimberly A	Н	<b>↓</b>	1	1	
iyan, ouzy	VIVIO	Certificated	Lamb	Special Ed Teacher -	10/21/08	05/11/09	rear-remp	Morales, Julio C	Н		1	1	
Schmitt, Roberta	MAG	Certificated	Temp	Mild/Moderate	8/21/08	05/01/10	1 Voor Tow-	Hippo James C	11	} I			
Soto, Natalie	VMS	Certificated	Temp	Teacher - General Ed	11/5/08	05/01/10		Hines, James C	H		1	1	
aunt, Jennifer R	BV	Certificated	Temp	Teacher - General Ed				Morales, Julio C Howard, Tina	$\vdash$		1		
aum, Jennier n	- BV	Continuated	remp	Teacher - Split	8/21/08	05/07/09	i rear-remp	noward, Tina	$\vdash$	1	1	1	
/allen, Lori L	VMS	Certificated	Tomp	Assignment	0100107	05/11/00	1 Voor Town	Maralan Iulia C					
vanon, LUII L	VIVIO	Certificated	Temp	Teacher - General Ed -	8/23/07	05/11/09	i tear-iemp	Morales, Julio C	H		1	1	
/allen, Lori L	VMS	Certificated	Temp	CAT	8/23/07	05/11/09	1 Voor Tarra	Marajaa tulic O	H				
Vebb, Taryn L	CHE	Certificated	Temp	Teacher - General Ed	9/12/07			Morales, Julio C Harden, Leslie		-	1000	0	Already counted
- coo, raight	10112	oo. mioatou	. Sirip	TOGOTICI - GETIOTALEU	3112101	03/11/09	i real-reimp	i iai uelli, Lesile			1		
	+			+	-	l ooo oumber	of Cotooorical	Cront tonahara idantifi- d b	113		32	154	A.6.5
	+			<del> </del>	<del> </del>	Less number	or categorical	Grant teachers identified b	y ine dist	HCT		(7)	
		1		1		. 1			11	ı I		147	1 str

#### **DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On October 2, 2015, I served the:

#### **SCO Comments**

Incorrect Reduction Claim

The Stull Act, 14-9825-I-02

Education Code Sections 44660-44665;

Statutes 1983, Chapter 498; Statutes 1999, Chapter 4

Fiscal Years: 2005-2006, 2006-2007, 2007-2008, and 2008-2009

Carlsbad Unified School District, Claimant

By making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on October 2, 2015 at Sacramento, California.

Lorenzo Duran

Commission on State Mandates 980 Ninth Street, Suite 300 Sacramento, CA 95814 (916) 323-3562

10/2/2015 Mailing List

# **COMMISSION ON STATE MANDATES**

# **Mailing List**

Last Updated: 9/10/15

**Claim Number:** 14-9825-I-02

Matter: The Stull Act

Claimant: Carlsbad Unified School District

#### TO ALL PARTIES, INTERESTED PARTIES, AND INTERESTED PERSONS:

Each commission mailing list is continuously updated as requests are received to include or remove any party or person on the mailing list. A current mailing list is provided with commission correspondence, and a copy of the current mailing list is available upon request at any time. Except as provided otherwise by commission rule, when a party or interested party files any written material with the commission concerning a claim, it shall simultaneously serve a copy of the written material on the parties and interested parties to the claim identified on the mailing list provided by the commission. (Cal. Code Regs., tit. 2, § 1181.3.)

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May 22, 2018

Mr. Christian Keiner Dannis Woliver Kelly 555 Capitol Mall, Suite 645 Sacramento, CA 95814 Ms. Jill Kanemasu
Division of Accounting and Reporting
State Controller's Office
3301 C Street, Suite 700
Sacramento, CA 95816

And Parties, Interested Parties, and Interested Persons (See Mailing List)

Re: Draft Proposed Decision, Schedule for Comments, and Notice of Hearing

The Stull Act, 14-9825-I-02

Education Code Sections 44660-44665;

Statutes 1983, Chapter 498; Statutes 1999, Chapter 4

Fiscal Years: 2005-2006, 2006-2007, 2007-2008, and 2008-2009

Carlsbad Unified School District, Claimant

Dear Mr. Keiner and Ms. Kanemasu:

The Draft Proposed Decision for the above-captioned matter is enclosed for your review and comment.

#### **Written Comments**

Written comments may be filed on the Draft Proposed Decision by **June 12, 2018**. Please note that all representations of fact submitted to the Commission must be signed under penalty of perjury by persons who are authorized and competent to do so and must be based upon the declarant's personal knowledge, information, or belief. (Cal. Code Regs., tit. 2, § 1187.5.) Hearsay evidence may be used for the purpose of supplementing or explaining other evidence but shall not be sufficient in itself to support a finding unless it would be admissible over an objection in civil actions. (Cal. Code Regs., tit. 2, § 1187.5.) The Commission's ultimate findings of fact must be supported by substantial evidence in the record.¹

You are advised that comments filed with the Commission on State Mandates (Commission) are required to be simultaneously served on the other interested parties on the mailing list, and to be accompanied by a proof of service. However, this requirement may also be satisfied by electronically filing your documents. Refer to <a href="http://www.csm.ca.gov/dropbox_procedures.php">http://www.csm.ca.gov/dropbox_procedures.php</a> on the Commission's website for electronic filing instructions. (Cal. Code Regs., tit. 2, § 1181.3.)

If you would like to request an extension of time to file comments, please refer to section 1187.9(a) of the Commission's regulations.

¹ Government Code section 17559(b), which provides that a claimant or the state may commence a proceeding in accordance with the provisions of section 1094.5 of the Code of Civil Procedure to set aside a decision of the Commission on the ground that the Commission's decision is not supported by substantial evidence in the record.

Mr. Keiner and Ms. Kanemasu May 21, 2018 Page 2

# Hearing

This matter is set for hearing on **Friday**, **July 27**, **2018**, at 10:00 a.m., State Capitol, Room 447, Sacramento, California. The Proposed Decision will be issued on or about July 13, 2018. Please let us know in advance if you or a representative of your agency will testify at the hearing, and if other witnesses will appear. If you would like to request postponement of the hearing, please refer to section 1187.9(b) of the Commission's regulations.

Sincerely,

Heather Halsey Executive Director Hearing Date: July 27, 2018

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#### **ITEM**

# INCORRECT REDUCTION CLAIM DRAFT PROPOSED DECISION

Education Code Sections 44660-44665 Statutes 1983, Chapter 498, Statutes 1999, Chapter 4

The Stull Act

Fiscal Years 2005-2006, 2006-2007, 2007-2008, and 2008-2009

14-9825-I-02

Carlsbad Unified School District, Claimant

#### **EXECUTIVE SUMMARY**

#### **Overview**

This Incorrect Reduction Claim (IRC) addresses reductions made by the State Controller's Office (Controller) to reimbursement claims filed by the Carlsbad Unified School District (claimant) for costs incurred during fiscal years 2005-2006 through 2008-2009 under the *Stull Act* program.

The Stull Act was originally enacted in 1971 to establish a uniform system of evaluation and assessment of the performance of "certificated personnel" within each school district. (Former Ed. Code, §§ 13485-13490.) The test claim statutes amended the Act, imposing a narrow higher level of service on school districts to (1) evaluate certificated instructional personnel on three additional criteria that were not previously included in the required evaluation and assessment, and to evaluate and assess certificated instructional and non-instructional personnel in years in which the employee would not otherwise have been evaluated, if the employee's last regularly-scheduled evaluation and assessment resulted in an unsatisfactory evaluation. These amendments constitute a very narrow approved program, with a number of limitations and caveats, as stated in the Parameters and Guidelines. The following issues are in dispute:

• Reductions based on the items that the claimant included in its time study, nineteen of which the Controller determined were beyond the scope of the mandate; and

¹ See Exhibit A, IRC, pages 31-32 [Parameters and Guidelines, pp. 4-5].

² Exhibit A, IRC, page 32 [Parameters and Guidelines, p. 5].

³ See Exhibit A, IRC, pages 31-32 [Parameters and Guidelines, pp. 4-5].

 Reductions based on 46 evaluations of certificated employees that were disallowed by the Controller for being outside the scope of the mandate. The claimant disputes the disallowed evaluations of non-instructional employees and preschool teachers.⁴

The Parameters and Guidelines for this program require that reimbursement be based on actual costs supported by contemporaneous source documents created at or near the same time the actual cost was incurred. The Controller initially rejected all of claimant's documentation supporting the reimbursement claims because the documentation was "based on average time increments supported with time records that were not completed contemporaneously." The claimant then conducted a time study "as a substitute for records of actual time spent" on the mandate. The Controller has partially accepted the claimant's time study. There is no indication in the record that claimant disputes the Controller's initial rejection of the documentation; the dispute in this IRC is focused on the development and application of the time study.

#### **Procedural History**

On September 25, 2005 the Commission on State Mandates (Commission) adopted the Parameters and Guidelines for this program. On December 28, 2006, the claimant filed its fiscal year 2005-2006 reimbursement claim. On January 25, 2008, the claimant filed its fiscal year 2006-2007 reimbursement claim. On February 13, 2009, the claimant filed its fiscal year 2007-2008 reimbursement claim. On January 29, 2010, the claimant filed its fiscal year 2008-2009 reimbursement claim. On June 24, 2010, the Controller issued a letter informing the claimant of the commencement of an audit. On May 5, 2012, the Controller issued the Draft Audit Report. On May 9, 2012, the claimant responded to the Draft Audit Report.

⁴ The total disputed reduction over three fiscal years is \$274,101. (See Exhibit A, IRC, page 2).

⁵ Exhibit A, IRC, page 65 [Controller's Final Audit Report, p. 6].

⁶ Exhibit A, IRC, page 65 [Controller's Final Audit Report, p. 6].

⁷ Exhibit A, IRC, page 11 ["In response to the Controller's exclusion at the beginning of the audit of all of the original claim documentation, the District with the agreement of the auditor prepared a time study based on the FY 2010-2011 certificated staff evaluation cycle."].

⁸ Exhibit A, IRC, page 338 [Claim Documentation for Fiscal Year 2005-2006].

⁹ Exhibit A, IRC, page 270 [Claim Documentation for Fiscal Year 2006-2007].

¹⁰ Exhibit A, IRC, page 184 [Claim Documentation for Fiscal Year 2007-2008].

¹¹ Exhibit A, IRC, page 85 [Claim Documentation for Fiscal Year 2008-2009].

¹² Exhibit B, Controller's Late Comments on the IRC, page 62 [Audit Entrance Conference Letter].

¹³ Exhibit A, IRC, page 62 [Final Audit Report, p. 3].

¹⁴ Exhibit A, IRC, page 62 [Final Audit Report, p. 3].

June 15, 2012, the Controller issued the Final Audit Report. On June 9, 2015, the claimant filed this IRC. On October 2, 2015, the Controller filed late written comments on the IRC.

Commission staff issued the Draft Proposed Decision on the IRC on May 22, 2018. 18

# **Commission Responsibilities**

Government Code section 17561(d) authorizes the Controller to audit the claims filed by local agencies and school districts and to reduce any claim for reimbursement of state-mandated costs that the Controller determines is excessive or unreasonable.

Government Code Section 17551(d) requires the Commission to hear and decide a claim that the Controller has incorrectly reduced payments to the local agency or school district. If the Commission determines that a reimbursement claim has been incorrectly reduced, section 1185.9 of the Commission's regulations requires the Commission to send the decision to the Controller and request that the costs in the claim be reinstated.

The Commission must review questions of law, including interpretation of parameters and guidelines, de novo, without consideration of legal conclusions made by the Controller in the context of an audit. The Commission is vested with exclusive authority to adjudicate disputes over the existence of state-mandated programs within the meaning of article XIII B, section 6. 19 The Commission must also interpret the Government Code and implementing regulations in accordance with the broader constitutional and statutory scheme. In making its decisions, the Commission must strictly construe article XIII B, section 6 and not apply it as an "equitable remedy to cure the perceived unfairness resulting from political decisions on funding priorities."

With regard to the Controller's audit decisions, the Commission must determine whether they were arbitrary, capricious, or entirely lacking in evidentiary support. This standard is similar to the standard used by the courts when reviewing an alleged abuse of discretion of a state agency.²¹

¹⁵ Exhibit A, IRC, page 57 [Final Audit Report Cover Letter].

¹⁶ Exhibit A, IRC, page 1.

¹⁷ Exhibit B, Controller's Late Comments on the IRC.

¹⁸ Exhibit C, Draft Proposed Decision.

¹⁹ *Kinlaw v. State of California* (1991) 54 Cal.3d 326, 331-334; Government Code sections 17551, 17552.

²⁰ County of Sonoma v. Commission on State Mandates (2000), 84 Cal.App.4th 1264, 1281, citing City of San Jose v. State of California (1996) 45 Cal.App.4th 1802, 1817.

²¹ Johnston v. Sonoma County Agricultural Preservation and Open Space District (2002) 100 Cal.App.4th 973, 983-984. See also American Bd. of Cosmetic Surgery, Inc. v. Medical Bd. of California (2008) 162 Cal.App.4th 534, 547.

The Commission must also review the Controller's audit in light of the fact that the initial burden of providing evidence for a claim of reimbursement lies with the claimant.²² In addition, sections 1185.1(f)(3) and 1185.2(d) and (e) of the Commission's regulations require that any assertions of fact by the parties to an IRC must be supported by documentary evidence. The Commission's ultimate findings of fact must be supported by substantial evidence in the record.²³

#### **Claims**

The following chart provides a brief summary of the claims and issues raised and staff's recommendation.

Issue	Description	Staff Recommendation
Was the IRC timely filed?	Former Section 1185.1 of the Commission's regulations required IRCs to be filed no later than three years after the Controller's final audit report, or other notice of adjustment.	The IRC was timely filed. The Controller's Final Audit Report was issued June 15, 2012, and the IRC was filed June 9, 2015, less than three years from the date of the Controller's Final Audit Report.
Were the Controller's reductions based on the denial of activities stated in claimant's time	The Controller rejected the claimant's original claim documentation for fiscal years 2005-2006 through 2008-2009, finding that the claim was based on average time increments and was not supported by contemporaneous source documents and the	The reductions are correct as a matter of law and not arbitrary, capricious, or entirely lacking in evidentiary support.  Planning and preparation
study that the Controller found were beyond the scope of the mandate correct as matter of law, and not arbitrary, capricious, or	Parameters and Guidelines require actual cost claiming supported by contemporaneous source documents. The claimant then performed a time study, with the Controller's approval, in the 2010-2011 fiscal year, which was applied to the audit period. The Controller reduced the total time result of the time study, finding that	activities, and evaluation conferences, are not part of the approved higher level of service provided for in the Test Claim Decision and the Parameters and Guidelines. The 19 disallowed activities are
entirely lacking in evidentiary support?	several activities within the time study were beyond the scope of the mandate – including training, planning and preparation activities, evaluation conference activities, and STAR	stated in too-general terms, and the claimant makes no effort to establish the relationship to the

²² Gilbert v. City of Sunnyvale (2005) 130 Cal.App.4th 1264, 1274-1275.

²³ Government Code section 17559(b), which provides that a claimant or the state may commence a proceeding in accordance with the provisions of section 1094.5 of the Code of Civil Procedure to set aside a decision of the Commission on the ground that the Commission's decision is not supported by substantial evidence in the record.

Was the Controller's disallowance of 46 of 660 completed evaluations for non-instructional employees and preschool teachers correct as a matter of law?	test evaluation activities – which the Controller found were <i>not</i> reimbursable activities under the Parameters and Guidelines.  The Controller reduced the number of completed evaluations to which the time study would apply, based on 46 completed evaluations that it found were beyond the scope of the mandate. There were five reasons for disallowance articulated, but only two were disputed:  • Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists are not certificated instructional employees;  • Preschool teachers do not perform the requirements of an educational program mandated by state or federal law.	mandate, as required by the Parameters and Guidelines.  The reductions are correct as a matter of law. Noninstructional certificated employees such as administrators, counselors, and librarians, are only required to be evaluated and assessed under the approved mandated program when the employee received an unsatisfactory evaluation in the employee's last regularly-scheduled evaluation. Those facts are not supported in the record. Preschool teachers do not perform the requirements of educational programs mandated under state or federal law, except in the case of special education pupils, and there is no evidence in the record that the preschool teachers at issue here were performing those requirements.
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# **Staff Analysis**

A. The Claimant Timely Filed this IRC Within Three Years From the Date It First Received From the Controller Written Notice of the Adjustment as Required by Former Section 1185.1 of the Commission's Regulations.

To be complete, an IRC filing must be timely filed "no later than three years following the date of the Office of State Controller's final audit report, letter, remittance advice, or other written notice of adjustment to a reimbursement claim."²⁴

²⁴ Former California Code of Regulations, title 2, sections 1185.1(c), 1185.2(a) (Register 2014, No. 21).

Here, the Final Audit Report is dated June 15, 2012.²⁵ The IRC was filed with the Commission on June 9, 2015.²⁶ Less than three years having elapsed between the issuance of the Final Audit Report and the filing of the IRC, this IRC was filed within the period prescribed in Code of Regulations, title 2, section 1185.1, as that section provided at the time.

Based on the foregoing, staff finds the IRC was timely filed.

B. The Controller's Reductions, Based on the Denial of Activities Included in the Claimant's Time Study that the Controller Found Were Beyond the Scope of the Mandate, Are Correct as Matter of Law, and Not Arbitrary, Capricious, or Entirely Lacking in Evidentiary Support.

The Parameters and Guidelines for this program, adopted September 27, 2005, during the 2005-2006 fiscal year which is the same fiscal year as the first year's reimbursement claim in this matter, require that reimbursement be based on *actual costs* supported by contemporaneous source documents created at or near the same time the actual cost was incurred, and that the evidence must show the validity of costs claimed and their relationship to the mandate.²⁷ Claimant was on notice of these requirements, yet chose to ignore them in filing its reimbursement claims.

The claimant's reimbursement claim documentation was comprised of forms and schedules containing time estimates made by administrators, which were then compiled to produce average times for the approved reimbursable activities, and translated into costs, based on staff hours estimated to have been spent on the mandate.²⁸ The Controller rejected the claimant's initial claimed costs, finding that the claimant did not comply with the contemporaneous source document rule, and did not claim actual costs, as required by the Parameters and Guidelines.²⁹ There is no assertion or evidence in the record rebutting that finding. Government Code section 17564 requires that reimbursement claims filed be filed in the manner prescribed in the parameters and guidelines. The claimant failed to comply with the Parameters and Guidelines, and therefore the Controller could have reduced the entire claim to zero. Any such reduction would have been correct as a matter of law.

Instead, the Controller permitted the claimant to conduct a time study "as a substitute for records of actual time spent on teacher evaluations." The results of that time study were then applied to the audit period, and the issue before the Commission in this IRC is whether the Controller's

²⁵ Exhibit A, IRC, pages 4; 57.

²⁶ Exhibit A, IRC, page 1.

²⁷ Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3].

²⁸ Exhibit A, IRC, pages 85-366. See, e.g., Exhibit A, IRC, pages 101; 104-122; 124-125; 141.

²⁹ Exhibit A, IRC, page 65 [Final Audit Report, p. 6]. See Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3]; *Clovis Unified School Dist. v. Chiang* (2010) 188 Cal.App.4th 794, 802-803 [Discussing non-enforceability of the Controller's Contemporaneous Source Document Rule when imposed only by Controller's Claiming Instructions, prior to valid incorporation within Parameters and Guidelines, a regulatory document].

³⁰ Exhibit A, IRC, page 65 [Final Audit Report, p. 6].

adjustments to and application of the time study is arbitrary, capricious, or entirely lacking in evidentiary support.

The claimant's time study identified 22 discrete activities involved in the teacher evaluation process, and sought to isolate the time spent on each item, in order to determine average times and a productive hourly rate.³¹ Those activities included training, meetings, observation, report writing, conferences between evaluators and teachers, and other activities relating to planning, preparation, and organizing notes, for a total (average) of 10 hours, 38 minutes per evaluation.³²

The Controller disallowed 19 of the 22 discrete activities of the time study, based on the following findings:

- (1) The activities related to planning, preparation, and organizing notes are not reimbursable under the mandate.
- (2) Training-related activities were included in the time study but also claimed as a direct cost item in each fiscal year. "We determined allowable time spent on training from the district's original claims."
- (3) Conferences between the evaluators and teachers also are not reimbursable because they were required before the enactment of the test claim legislation.³³

And, according to the claimant's narrative, the Controller also denied one activity related to evaluation and assessment of teachers with respect to their pupils' STAR testing results, and progress toward state standards.³⁴ The Controller found that each completed evaluation takes an average of 5 hours and 8 minutes, based on the three allowed activities from the claimant's time study.³⁵

Claimant does not dispute the disallowance of training activities from the time study, which constitutes \$889 of the total \$274,101 reduced. However, the claimant disputes the disallowance of activities related to evaluation conferences, preparation and planning activities, and reviewing STAR test results. The study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study of the study

As noted, the approved mandate is a very narrow higher level of service, and reimbursement is not required for evaluation and assessment activities conducted under prior law. Further, the Parameters and Guidelines expressly limit reimbursement to the new components (or criteria) of evaluation and assessment required by the test claim statutes, and to additional assessments conducted in a year in which they would not otherwise be required following an unsatisfactory

³¹ See Exhibit A, IRC, page 11.

³² Exhibit A, IRC, page 65 [Final Audit Report, p. 6].

³³ Exhibit A, IRC, page 66 [Final Audit Report, p. 7].

³⁴ Exhibit A, IRC, page 16.

³⁵ Exhibit A, IRC, page 67 [Final Audit Report, p. 8].

³⁶ Exhibit A, IRC, pages 15-16; pages 65-65 [Final Audit Report, pages 5-6].

³⁷ Exhibit A, IRC, pages 13-16.

evaluation.³⁸ And, the Parameters and Guidelines expressly require the claimant to identify the state or federal law that mandates the educational program being performed by the employee being evaluated.³⁹

Nowhere in time study documentation, the response to the Draft Audit Report, or the IRC narrative itself, does the claimant attempt to tie the 19 disallowed time study activities to the approved activities in the narrow higher level of service approved by the Commission in the Test Claim Decision. As explained in the Test Claim Decision, prior law already required evaluation of certificated employees. Therefore, the claimant's time study elements, which are stated in general terms, are not limited to the portion of the activity approved as a higher level of service in the Test Claim Decision and Parameters and Guidelines. Only that portion of the certificated instructional employee evaluation which relates to (1) instructional techniques; (2) adherence to curricular objectives; or (3) for STAR-subject teachers, the progress of pupils toward state-adopted standards, is reimbursable under the Parameters and Guidelines.

Furthermore, the activity proposed for claimant's time study related to STAR testing goes beyond the scope of the reimbursable activity. The Parameters and Guidelines provide reimbursement to evaluate and assess the performance of teachers of STAR test subjects⁴² "as it reasonably relates to the progress of pupils towards the state adopted academic content standards..." The Parameters and Guidelines also clarify that reimbursement for this activity is limited to "reviewing the results" of the STAR test, "as it reasonably relates to the performance of those certificated employees that teach [STAR subjects]," and "including in the written evaluation of those certificated employees the assessment of the employee's performance" based on their pupils' STAR test results.⁴³ However, the activity stated in the claimant's proposed time study pertaining to STAR testing is "Discussing the STAR results with teachers and assessing how to improve instructional abilities." The Test Claim Decision made clear that the activities surrounding the evaluation conferences were required by prior law, and therefore limited reimbursement very specifically. "Reviewing the results" and "including in the written evaluation" an assessment based on STAR test results is not the same as "Discussing the STAR results with teachers..."

³⁸ Exhibit A, IRC, pages 31-33 [Parameters and Guidelines, pp. 4-6].

³⁹ Exhibit A, IRC, pages 31-33 [Parameters and Guidelines, pp. 4-6].

⁴⁰ Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, pages 18-25.

⁴¹ Exhibit A, IRC, pages 31-32 [Parameters and Guidelines, pp. 4-5].

⁴² Grades 2 through 11, teaching Reading, Writing, Mathematics, History/Social Science, and Science.

⁴³ Exhibit A, IRC, page 31 [Parameters and Guidelines, p. 4].

⁴⁴ Exhibit A, IRC, page 13.

⁴⁵ Exhibit A, IRC, pages 13; 31 [Parameters and Guidelines, p. 4].

And, to the extent certain elements of the claimant's time study are "rational, relevant, reasonable and necessary part[s] of implementing the mandated activities,"⁴⁶ the claimant had an opportunity to include those activities within the Parameters and Guidelines as "reasonably necessary activities" pursuant to Government Code section 17557(a) and Code of Regulations, title 2, section 1183.7(d). If the claimant seeks reimbursement for the various elements of its time study as "reasonably necessary" elements of the reimbursable mandate, those activities must be stated within the Parameters and Guidelines, either when the Parameters and Guidelines were first adopted, or as an amendment request.⁴⁷ To the extent the activities claimed exceed the scope of the mandate as stated in the Parameters and Guidelines, the argument that such items are "reasonably necessary" cannot now be employed as an end-run around the Parameters and Guidelines.

Finally, it is the claimant's burden to establish actual costs, using "source documents that show the validity of such costs, when they were incurred, and *their relationship to the reimbursable activities*." The claimant frames these issues in terms of the Controller's failure to state a reason for the reduction, and ignores its duty to establish the relationship to the reimbursable activities. The Controller's concession permitting the use of a time study does not alter the scope of the mandate, or otherwise relieve the claimant of the burden to show that its claimed costs are eligible for reimbursement pursuant to the Test Claim Decision and Parameters and Guidelines.

Accordingly, staff finds that the Controller's reduction of costs based on claimant's time study is not incorrect as a matter of law, or arbitrary, capricious, or entirely lacking in evidentiary support.

# C. The Controller's Disallowance of Completed Evaluations that Are Beyond the Scope of the Mandate Is Correct as a Matter of Law.

The Controller found that evaluations for the following employees were beyond the scope of the mandate and disallowed costs for such evaluations:

- Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated instructional employees; and
- Preschool teachers who do not perform the requirements of the program that is mandated by state or federal law.⁵⁰

⁴⁶ Exhibit A, IRC, page 15.

⁴⁷ See Code of Regulations, title 2, section 1183.17.

⁴⁸ Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3].

⁴⁹ See, e.g., Exhibit A, IRC, page 15 [Discussing "Preparation Activities," the claimant states that the Controller "has stated no basis to exclude it from the scope of the evaluation process."]; Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3].

⁵⁰ Exhibit A, IRC, pages 73-74 [Final Audit Report, pp. 14-15].

The claimant argues that non-instructional certificated employees and preschool teachers are not excluded by the Parameters and Guidelines. ⁵¹

The claimant is wrong. Part IV.A.1. of the Parameters and Guidelines limits reimbursement to "certificated *instructional* employees," and to the *two new components* of the evaluation, both of which relate to the provision of *classroom instruction*: "instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives." In addition, Part IV.A.1. requires the claimant to identify the state or federal law mandating the educational program being performed by the certificated instructional personnel. Therefore, this section provides reimbursement for evaluation and assessment of *instructional* employees only, and only those performing the requirements of educational programs mandated by state or federal law, which the claimant must allege. The Controller reasonably concludes that "instructional" employees excludes administrators, librarians, counselors, psychologists, and others. Furthermore, Education Code section 48200 et seq. provides for compulsory education for pupils aged 6 to 18, but does not apply to preschool-aged children, and the claimant has not alleged or asserted any other state or federal law mandating preschool instruction. Therefore, section IV.A.1. does not provide reimbursement for the evaluation and assessment of either non-instructional administrative personnel, or preschool teachers.

Part IV.A.2. requires reimbursement only for evaluations of "certificated instructional employees that teach..." STAR test subjects in grades 2 to 11.⁵⁶ This provision also excludes non-instructional administrative and support personnel, and excludes preschool teachers, based on nothing more than its plain language.

Part IV.B.1. provides for reimbursement for evaluation and assessment of certificated instructional *and* non-instructional employees, but only those whose last regularly-scheduled evaluation resulted in an unsatisfactory evaluation (i.e., off-year evaluations for permanent certificated employees, and more often than once every five years for permanent "tenured" certificated employees). Part IV.B.1. also includes the same caveat as above, that the claimant must identify the state or federal law mandating the educational program being performed; and, the general requirement that the claimant establish the relationship to the reimbursable activities

⁵¹ Exhibit A, IRC, pages 18-19.

⁵² Exhibit A, IRC, page 31 [Parameters and Guidelines, p. 4].

⁵³ Exhibit A, IRC, page 31 [Parameters and Guidelines, p. 4].

⁵⁴ Exhibit A, IRC, pages 73-74 [Final Audit Report, pp. 14-15].

⁵⁵ The claimant stated in comments on the draft audit that federal law requires preschool instruction for special education pupils when part of a pupil's Individualized Education Plan, but did not cite any applicable law. However, the Controller stated in the Final Audit Report that the claimant did not provide any legal citation or other source to support its assertions that preschool teachers are not excluded, and "[i]n addition, the district has not provided any documentation to support that preschool teachers previously excluded from reimbursement, if any, performed any activities related to special education pupils." (Exhibit A, IRC, pages 71-74 [Controller's Final Audit Report, pp. 12-15].)

⁵⁶ Exhibit A, IRC, pages 31-32 [Parameters and Guidelines, pp. 4-5].

also requires that the claimant show that an employee evaluated outside the mandated schedule did indeed receive an unsatisfactory evaluation. Preschool teachers are therefore excluded, as discussed above, and there has been no specific argument, and there is no indication in the record whether any non-instructional personnel were evaluated under Part IV.B.1., and therefore there is no indication or evidence in the record that the Controller's reduction is incorrect.

Based on the foregoing, staff finds that the Controller's disallowance of 46 completed evaluations that were beyond the scope of the mandate is correct as a matter of law.

#### Conclusion

Based on the foregoing, staff finds that the IRC was timely filed. Staff further finds that the Controller's reduction of costs claimed based on the claimant's failure to comply with the Parameters and Guidelines is correct as a matter of law, and adjustments to the time study were not arbitrary, capricious, or entirely lacking in evidentiary support. Staff further finds that disallowance of 46 of 660 completed evaluations is correct as a matter of law and not arbitrary, capricious, or entirely lacking in evidentiary support.

#### **Staff Recommendation**

Staff recommends that the Commission adopt the Proposed Decision to deny the IRC. Staff further recommends that the Commission authorize staff to make any technical, non-substantive changes following the hearing.

#### **BEFORE THE**

### **COMMISSION ON STATE MANDATES**

#### STATE OF CALIFORNIA

IN RE INCORRECT REDUCTION CLAIM ON:

Education Code Sections 44662 and 44664

Statutes 1983, Chapter 498 and Statutes 1999, Chapter 4

Fiscal Years 2005-2006, 2006-2007, 2007-2008, and 2008-2009

Filed on June 9, 2015

Carlsbad Unified School District, Claimant

Case No.: 14-9825-I-02

The Stull Act

DECISION PURSUANT TO GOVERNMENT CODE SECTION 17500 ET SEQ.; CALIFORNIA CODE OF REGULATIONS, TITLE 2, DIVISION 2, CHAPTER 2.5. ARTICLE 7

(*Adopted July 27, 2018*)

#### **DECISION**

The Commission on State Mandates (Commission) heard and decided this Incorrect Reduction Claim (IRC) during a regularly scheduled hearing on July 27, 2018. [Witness list will be included in the adopted Decision.]

The law applicable to the Commission's determination of a reimbursable state-mandated program is article XIII B, section 6 of the California Constitution, Government Code section 17500 et seq., and related case law.

The Commission [adopted/modified] the Proposed Decision to [approve/partially approve/deny] the IRC at the hearing by a vote of [vote count will be included in the adopted Decision] as follows:

Member	Vote
Lee Adams, County Supervisor	
Ken Alex, Director of the Office of Planning and Research	
Richard Chivaro, Representative of the State Controller	
Mark Hariri, Representative of the State Treasurer, Vice Chairperson	
Sarah Olsen, Public Member	
Carmen Ramirez, City Council Member	
Jacqueline Wong-Hernandez, Representative of the Director of the Department of Finance, Chairperson	

#### **Summary of the Findings**

This analysis addresses reductions made by the State Controller's Office (Controller) to reimbursement claims filed by the Carlsbad Unified School District (claimant) for costs incurred during fiscal years 2005-2006 through 2008-2009 (audit period) for the *Stull Act* program. The claimant disputes reductions totaling \$274,101 for the audit period.

The Commission denies this IRC, finding that reductions related to the claimant's time study, and disallowances of completed employee evaluations in all four fiscal years were correct as a matter of law and not arbitrary, capricious, or entirely lacking in evidentiary support.

Specifically, the Controller reduced costs based on denial of 19 of 22 discrete activities identified in the claimant's time study, relating to training, meetings, observation, report writing, conferences between evaluators and teachers, and other activities relating to planning, preparation, and organizing notes, and STAR testing. These activities are beyond the very narrow scope of the approved higher level of service, and the claimant has presented no argument or evidence establishing the relationship to the mandated activities included in the Parameters and Guidelines. The reduction based on the 19 denied activities is therefore correct as a matter of law, and not arbitrary, capricious, or entirely lacking in evidentiary support.

In addition, the Controller reduced reimbursement based on disallowed completed evaluations for non-instructional certificated employees, such as administrators, counselors, and librarians, among others; and preschool teachers. Preschool teachers do not perform the requirements of educational programs mandated by state or federal law, and therefore evaluations of preschool teachers are not reimbursable. Similarly, evaluations of non-instructional certificated personnel are reimbursable under Part IV.B. of the Parameters and Guidelines only if such employees' last regularly-scheduled evaluation resulted in an unsatisfactory evaluation; those facts are not supported in the record. The reduction based on disallowed completed evaluations is therefore correct as a matter of law.

#### **COMMISSION FINDINGS**

#### I. Chronology

12/28/2006	The claimant filed its 2005-2006 reimbursement claim. ⁵⁷
01/25/2008	The claimant filed its 2006-2007 reimbursement claim. ⁵⁸
02/13/2009	The claimant filed its 2007-2008 reimbursement claim. ⁵⁹
01/29/2010	The claimant filed its 2008-2009 reimbursement claim. 60

⁵⁷ Exhibit A, IRC, page 338 [Claim Documentation for Fiscal Year 2005-2006].

⁵⁸ Exhibit A, IRC, page 270 [Claim Documentation for Fiscal Year 2006-2007].

⁵⁹ Exhibit A, IRC, page 184 [Claim Documentation for Fiscal Year 2007-2008].

 $^{^{60}}$  Exhibit A, IRC, page 85 [Claim Documentation for Fiscal Year 2008-2009].

06/24/2010	The Controller issued a letter informing the claimant of the initiation of the audit. ⁶¹
05/02/2012	The Controller issued the Draft Audit Report. 62
05/09/2012	The claimant responded to the Draft Audit Report
06/15/2012	The Controller issued its Final Audit Report. ⁶³
07/13/2012	The Controller issued "results of review" letters. ⁶⁴
06/09/2015	The claimant filed the IRC. ⁶⁵
10/02/2015	The Controller filed late comments on the IRC. ⁶⁶
05/22/2018	Commission staff issued the Draft Proposed Decision. ⁶⁷

# II. Background

The Stull Act was originally enacted in 1971 to establish a uniform system of evaluation and assessment of the performance of "certificated personnel" within each school district. (Former Ed. Code, §§ 13485-13490.) As originally enacted, the Stull Act required the governing board of each school district to develop and adopt specific guidelines to evaluate and assess certificated personnel, and to avail itself of the advice of certificated instructional personnel before developing and adopting the guidelines. The evaluation and assessment of the certificated personnel was required to be reduced to writing and a copy transmitted to the employee no later than sixty days before the end of the school year. The employee then had the right to initiate a written response to the evaluation, which became a permanent part of the employee's personnel file. The school district was also required to hold a meeting with the employee to discuss the evaluation.

⁶¹ Exhibit B, Controller's Late Comments on the IRC, page 62 [Audit Entrance Conference Letter].

⁶² Exhibit A, IRC, page 62 [Final Audit Report, p. 3].

⁶³ Exhibit A, IRC, page 57 [Final Audit Report Cover Letter].

⁶⁴ Exhibit A, IRC, page 4.

⁶⁵ Exhibit A, IRC, page 1.

⁶⁶ Exhibit B, Controller's Late Comments on the IRC.

⁶⁷ Exhibit C, Draft Proposed Decision.

⁶⁸ Former Education Code sections 13486-13487.

⁶⁹ Former Education Code section 13488.

⁷⁰ Former Education Code section 13488.

⁷¹ Former Education Code section 13488.

Prior law also required that the evaluation and assessment be continuous. To probationary employees, the evaluation had to occur once each school year. For permanent employees, the evaluation was required every other year. Former section 13489 also required that the evaluation include recommendations, if necessary, for areas of improvement in the performance of the employee. If the employee was not performing his or her duties in a satisfactory manner according to the standards, the "employing authority" was required to notify the employee in writing, describe the unsatisfactory performance, and confer with the employee making specific recommendations as to areas of improvement and endeavor to assist in the improvement. Reimbursement for these prior requirements was denied by the Commission. To

The test claim statutes amended the Stull Act in 1983 and 1999 to expand the scope of evaluation and assessment of certificated personnel. The test claim statutes added additional criteria that must be included in those evaluations: the employee's instructional techniques and strategies, and adherence to curricular objectives; and the performance of instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 (i.e., the STAR test subjects) as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests. And, in the case the employee receives an unsatisfactory result, the test claim statutes require an additional evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated.

Since prior law already required evaluation and assessment of certificated personnel, the Commission partially approved the Test Claim on May 27, 2004, for those activities that represent the *limited* new program or higher level of service mandated by the state by the test claim statutes. The Test Claim Decision also found that the mandate was limited to certificated personnel performing the requirements of educational programs mandated by state or federal law; in other words, if the personnel being evaluated are performing the duties of voluntary school programs, the evaluation of those personnel would not be mandated by the state.⁷⁶

The Parameters and Guidelines were adopted September 27, 2005. As relevant to this IRC, the Parameters and Guidelines identify the following reimbursable activities and limitations:

#### A. Certificated Instructional Employees

1. Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498.).

⁷² Former Education Code section 13489.

⁷³ Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, pages 2; 17-18.

⁷⁴ Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, pages 29-33.

⁷⁵ Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, pages 33-34.

⁷⁶ See Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, pages 5-12.

Reimbursement for this activity is limited to:

- a. reviewing the employee's instructional techniques and strategies and adherence to curricular objectives, and
- b. including in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:
  - o once each year for probationary certificated employees;
  - o every other year for permanent certificated employees; and
  - o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.

Note: For purposes of claiming reimbursement, eligible claimants must identify the state or federal law mandating the educational program being performed by the certificated instructional employees.

2. Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Ed. Code, § 44662, subd. (b), as amended by Stats. 1999, ch. 4.).

Reimbursement for this activity is limited to:

- a. reviewing the results of the Standardized Testing and Reporting test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and
- b. including in the written evaluation of those certificated employees the assessment of the employee's performance based on the Standardized Testing and Reporting results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:
  - o once each year for probationary certificated employees;
  - o every other year for permanent certificated employees; and
  - o beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- B. Certificated (Instructional and Non-Instructional) Employees

1. Evaluate and assess permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law and receive an *unsatisfactory evaluation* in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year). The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498).

This additional evaluation and assessment of the permanent certificated employee requires the school district to perform the following activities:

- a. evaluating and assessing the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));
- b. reducing the evaluation and assessment to writing (Ed. Code, § 44663, subd. (a)). The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
- c. transmitting a copy of the written evaluation to the certificated employee (Ed. Code, § 44663, subd. (a));
- d. attaching any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and
- e. conducting a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a)).

Note: For purposes of claiming reimbursement, eligible claimants must identify the state or federal law mandating the educational program being performed by the certificated, instructional and non-instructional, employees.⁷⁷

⁷⁷ Exhibit A, IRC, pages 31-33 [Parameters and Guidelines, pp. 3-5].

Additionally, the Parameters and Guidelines require that actual costs claimed "must be traceable and supported by source documents that show the validity of such costs, when they were incurred, and their relationship to the reimbursable activities."⁷⁸

#### Controller's Audit and Summary of the Issues

The Controller's Final Audit Report states that "[i]nitially, all costs claimed [for employee salaries and benefits] by the district were unallowable because they were based on average time increments supported with time records that were not completed contemporaneously." In other words, the claimant did not provide adequate source documentation, and utilized average times to calculate the reimbursement requested. The Controller initially disallowed the entire claim. The claimant's representatives then conduced a time study in fiscal year 2010-2011, as a substitute for records of actual time spent on evaluations, to determine the costs for the audit period (fiscal years 2005-2006 through 2008-2009). The Controller accepted and applied that time study to the audit period, but as explained below determined that the scope of the time study included unallowable activities and costs.

There is no indication in the record that claimant disputes the Controller's initial rejection of the claimant's source documentation; the dispute in this IRC is focused on the development and application of the claimant's time study. 81

The claimant's time study documented the time to perform 22 "activities of the teacher evaluation process," and determined that it takes evaluators approximately 10 hours and 38 minutes, on average, to complete each required evaluation. 82 Of those 22 "activities" included in the time study, the Controller disallowed 19, as follows:

- 1. Preparing before training or planning meetings/conferences;
- 2. Training or planning meetings/conferences;
- 3. Preparing/organizing notes from training or planning meetings/conferences;
- 4. Preparing before meeting with teachers;
- 5. Conducting actual conference with teachers;
- 6. Preparing or organizing notes from meetings with teachers;
- 7. Preparing before "Pre-Observation" conferences with teachers;

⁷⁸ Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3].

⁷⁹ Exhibit A, IRC, page 65 [Controller's Final Audit Report, p. 6].

⁸⁰ Exhibit A, IRC, page 65 [Controller's Final Audit Report, p. 6].

⁸¹ Exhibit A, IRC, page 11 ["In response to the Controller's exclusion at the beginning of the audit of all of the original claim documentation, the District with the agreement of the auditor prepared a time study based on the FY 2010-2011 certificated staff evaluation cycle."].

⁸² Exhibit A, IRC, page 65 [Controller's Final Audit Report, p. 6]. See also, Exhibit A, IRC, page 11 ["The time study identified 22 discrete activities established as a result of staff interviews."].

- 8. Conducting "Pre-Observation" conferences with teachers;
- 9. Preparing/organizing notes form "Pre-Observation" conferences with teachers:
- 10. Preparing before classroom observations of teachers;
- 11. Preparing/organizing notes from classroom observations, finalizing Collect Data forms;
- 12. Reporting observations, preparing the Standards for Excellence in Teaching observation checklists;
- 13. Preparing before "Post-Observation" conferences with teachers;
- 14. Conducting "Post-Observation" conferences with teachers;
- 15. Preparing notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets;
- 16. Preparing before Final Evaluation conferences with teachers;
- 17. Conducting Final Evaluation conferences with teachers;
- 18. Preparing/organizing notes from Final Evaluation conferences with teachers; and
- 19. Discussing the STAR results with teachers and assessing how to improve instructional abilities. 83

The Controller determined that activities related to planning, preparation, and organizing notes are not reimbursable because they are not required activities under the Parameters and Guidelines; that claimant duplicated costs by including training in the time study, which was identified as a separate reimbursable activity in the Parameters and Guidelines on a one-time basis for each employee performing the mandate; and that conferences between teachers and evaluators are not reimbursable because they were required under prior law.⁸⁴

Accordingly, the Controller allowed three elements, or "activities" of the time study:

- Conducting "informal" classroom observations;
- Conducting "formal" classroom observations; and
- Writing Final Evaluation Reports and/or preparing Teacher Evaluation Report.⁸⁵

⁸³ Exhibit A, IRC, pages 65-66 [Controller's Final Audit Report, pp. 6-7].

⁸⁴ Exhibit A, IRC, page 66 [Controller's Final Audit Report, p. 7].

⁸⁵ Exhibit A, IRC, page 67 [Controller's Final Audit Report, p. 8].

Based on these three activities, the Controller found that it takes approximately 5 hours and 8 minutes to complete each required teacher evaluation under the mandated program. ⁸⁶

In addition to limiting the elements of the time study, the Controller disallowed costs for 46 of 660 completed evaluations, which the Controller determined were claimed in excess of the scope of the mandate. The evaluations which the Controller found to be non-reimbursable were for:

- Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated *instructional* employees;
- Preschool teachers who do not perform the requirements of the program that is mandated by state or federal law;
- Duplicate teacher evaluations claimed multiple times in one school year;
- Permanent biannual teacher evaluations claimed every year rather than every other year; and
- Permanent five-year teacher evaluations claimed multiple times in a five-year period rather than once every five years.⁸⁷

The claimant responded to these findings in the Draft Audit Report, concurring with the findings on duplicate evaluations and evaluations conducted in years that they were not mandated, but asserting that the remaining reductions for administrative or library personnel, who were also certificated employees, and for preschool teachers, were not supported in the audit report or by any law or rule cited by the Controller.⁸⁸ In addition, the claimant conceded that training activities and costs were duplicated in the time study, and agreed that because the Parameters and Guidelines permitted training only once for each employee, the Controller's adjustment is reasonable.⁸⁹

Accordingly, based on the claimant's response to the audit report and its IRC filing, the following issues are in dispute:

- Reductions based on the 19 disallowed activities in the claimant's time study; and
- Disallowed completed evaluations based on the type of certificated employee (i.e., Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists, which are not certificated *instructional* employees; and preschool teachers, which the Controller found were not

⁸⁶ Exhibit A, IRC, page 67 [Controller's Final Audit Report, p. 8].

⁸⁷ Exhibit A, IRC, page 67 [Controller's Final Audit Report, p. 8].

⁸⁸ Exhibit A, IRC, pages 70-71 [Controller's Final Audit Report, pp. 11-12].

 $^{^{89}}$  Exhibit A, IRC, page 70 [Controller's Final Audit Report, p. 11].

performing the requirements of state- or federally-mandated educational programs). 90

#### **III.** Positions of the Parties

#### A. Carlsbad Unified School District

#### 1. Time Study

The claimant groups the 19 disallowed activities from the time study into four categories: evaluation conferences; preparation activities; training activities; and STAR testing results. ⁹¹ The claimant acknowledges that the audit report allows reimbursement for training costs elsewhere in the findings, and therefore the claimant "does not dispute removal of the training time from the time study." ⁹² With respect to evaluation conferences, the claimant cites the Controller's finding that evaluation conferences are not new to the test claim statute, and argues that "[t]he Controller has confused the subject matter of the old and new mandated with the method of implementation." ⁹³ The claimant notes that the Commission's Test Claim Decision found that the test claim statute added two new factors or criteria for evaluation of certificated instructional employees: "the instructional techniques and strategies used by the employee, and the employee's adherence to curricular objectives." ⁹⁴ The claimant argues that "the fact that districts used evaluation conferences to implement the previous mandated activities does not exclude reimbursement to use the same method to implement the new activities."

With respect to "preparation activities," the claimant argues that preparation time was stated as a separate element in the time study only to promote accuracy: "preparation time could have been logically merged with the activity relevant to the preparation." The claimant notes that the Parameters and Guidelines "enumerates the subject matter of the evaluation process and not the entire process to implement the mandate." The claimant further notes, "[e]ven the Controller characterizes the parameters and guidelines as an 'outline." The claimant therefore concludes that preparation relating to evaluation conferences "is a rational, relevant, reasonable and

 $^{^{90}}$  The total disputed reduction over four fiscal years is \$258,812 in salaries and benefits, and \$15,289 in related indirect costs. (Exhibit A, IRC, page 65 [Controller's Final Audit Report, p. 6].)

⁹¹ Exhibit A, IRC, pages 13-16.

⁹² Exhibit A, IRC, page 16.

⁹³ Exhibit A, IRC, page 13.

⁹⁴ Exhibit A, IRC, page 14.

⁹⁵ Exhibit A, IRC, page 14.

⁹⁶ Exhibit A, IRC, page 15.

⁹⁷ Exhibit A, IRC, page 15.

⁹⁸ Exhibit A, IRC, page 15.

necessary part of implementing the mandated activities in the usual course of business and the Controller has stated no basis to exclude it from the scope of the evaluation process."⁹⁹

And with respect to STAR testing results, the claimant argues that the audit disallows time to review STAR test results "as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11..." despite such review being found reimbursable in the Commission's Test Claim Decision. 100

Accordingly, the claimant alleges that the Controller incorrectly denied costs for activities properly included within the time study, and, incorrectly reduced the average time resulting from the study.

#### 2. Excluded Evaluations

The claimant's time study assigned a value (in staff time) to each evaluation, for purposes of tracking costs and claiming reimbursement. The Controller, however, disallowed costs for 46 of 660 completed evaluations claimed, based on findings that those evaluations were beyond the scope of the mandate. Evaluations claimed beyond the scope of the mandate include those that were conducted at a time they were not required, including duplicate evaluations within a single school year and evaluations conducted more than once every five years for permanent five-yeartenured teachers, or more than every other year for permanent non-tenured teachers. 101 The remaining disallowances were for certificated employees who were not required to be evaluated under the mandate (specifically, administrative and other non-instructional personnel, and preschool instructors). 102 While the claimant concurs with the Controller's findings relating to evaluations conducted in a year they were not required, the claimant also notes in its IRC that the Controller has not identified the number of evaluations excluded based on each of these grounds. 103 With respect to excluded employees, such as "principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists,"104 the claimant argues that the Test Claim Decision and Parameters and Guidelines do not limit reimbursement to employees providing classroom instruction. Rather, the claimant argues that the Test Claim Decision includes all certificated personnel "involved in the education process..." 105

⁹⁹ Exhibit A, IRC, page 15.

¹⁰⁰ Exhibit A, IRC, page 16 [citing the Test Claim Decision, *The Stull Act*, 98-TC-25].

¹⁰¹ Exhibit A, IRC, page 67 [Controller's Final Audit Report, p. 8].

 $^{^{102}}$  Exhibit A, IRC, page 67 [Controller's Final Audit Report, p. 8].

¹⁰³ Exhibit A, IRC, pages 19-20.

¹⁰⁴ Exhibit A, IRC, page 67 [Controller's Final Audit Report, p. 8].

¹⁰⁵ Exhibit A, IRC, page 17 [citing the Test Claim Decision, *The Stull Act*, 98-TC-25, pages 18-20 ("Certificated employees are those employees directly involved in the educational process and include both instructional and non-instructional employees such as teachers, administrators, supervisors, and principals.")].

With respect to the exclusion of completed evaluations for preschool teachers, the claimant argues that the Commission identified a number of voluntary educational programs for which reimbursement for this mandate was not required, and preschool instruction was not among them. Accordingly, the claimant asserts that "[t]here is no stated basis to exclude certificated preschool instructors." 107

#### **B.** State Controller's Office

The Controller explains that "[i]nitially, all costs claimed by the district were unallowable because they were based on average time increments supported with time records that were not completed contemporaneously." The claimant conducted a time study in fiscal year 2010-2011, "as a substitute for records of actual time spent on teacher evaluations." The Controller accepted and applied that time study to the audit period, but determined that the scope of the time study included unallowable activities and costs:

The time study documented the time it took district evaluators to perform 22 separate activities of the teacher evaluation process. The time study results reported time for training, planning, preparation, meetings, observation, report writing and other activities within the evaluation process. We determined that 19 activities reported in the time study were unallowable. 110

The claimant disputed those 19 disallowed activities, and grouped them into four categories: evaluation conferences; preparation activities; training activities; and STAR testing results. Responding to the claimant's categories, the Controller asserts that "evaluation conferences" as described by the claimant are not reimbursable for two reasons: first, section IV.B.1. of the Parameters and Guidelines only provides reimbursement for evaluation conferences every other year, unless a previous evaluation results in an unsatisfactory evaluation. The Controller states that no unsatisfactory evaluations were reported. And second, the Controller maintains that section IV.A.1. and IV.A.2. do not provide reimbursement for evaluation conferences, and the Commission's Statement of Decision expressly found that conferences were not reimbursable "because they were required before the enactment of the test claim legislation." The

¹⁰⁶ Exhibit A, IRC, pages 18-19 [citing Parameters and Guidelines, p. 3; Test Claim Decision, p. 11, Fn 42].

¹⁰⁷ Exhibit A, IRC, page 19.

¹⁰⁸ Exhibit B, Controller's Late Comments on the IRC, page 10.

¹⁰⁹ Exhibit B, Controller's Late Comments on the IRC, page 10.

¹¹⁰ Exhibit B, Controller's Late Comments on the IRC, page 10.

¹¹¹ Exhibit A, IRC, pages 13-16.

¹¹² Exhibit B, Controller's Late Comments on the IRC, page 14.

¹¹³ Exhibit B, Controller's Late Comments on the IRC, page 14.

Controller notes that the test claim statutes added "two new evaluation factors," but the evaluation itself was required under prior law. 114

With respect to "preparation activities," the Controller argues that reimbursement is limited to those activities outlined in the Parameters and Guidelines, which do not list any preparation activities as reimbursable. To the extent the claimant asserts that preparation activities are "reasonable and necessary," the Controller suggests that "[t]he district may filed an amendment with the Commission on State Mandates to amend the existing parameters and guidelines." 116

And with respect to "STAR testing results," the Controller asserts that the claimant "did not claim any activity that is reimbursable." The Controller notes that "[r]eimbursement for the activity IV.A.2 is limited to 'review of the results of the STAR test...and to include in the written evaluation...the assessment of the employee's performance based on STAR results..." The claimant instead claimed reimbursement for "discussing the STAR results with teachers and how to improve instructional abilities." The Controller asserts that "these two activities are not interchangeable," and "[w]e believe conference activities are not reimbursable, as they are not listed as allowable activities in the respective section of the program's parameters and guidelines." Parameters and guidelines."

Finally, with respect to the number of completed evaluations claimed, and the number disallowed, the Controller notes that the claimant disagrees with the disallowed evaluations for "non-instructional certificated personnel," including administrators, counselors, librarians, and others; and disallowed evaluations for preschool teachers. ¹²¹ The Controller maintains that the claimant is reading the Commission's Test Claim Decision out of context, and therefore misinterpreting the Parameters and Guidelines with respect to employees for whom evaluations are reimbursable. ¹²² Addressing preschool teachers specifically, the Controller argues that the claimant failed to identify any specific state or federal law making preschool instruction mandatory, and therefore evaluations of preschool teachers are beyond the scope of this mandate. ¹²³

¹¹⁴ Exhibit B, Controller's Late Comments on the IRC, page 14.

¹¹⁵ Exhibit B, Controller's Late Comments on the IRC, page 15.

¹¹⁶ Exhibit B, Controller's Late Comments on the IRC, page 15.

¹¹⁷ Exhibit B, Controller's Late Comments on the IRC, page 15.

¹¹⁸ Exhibit B, Controller's Late Comments on the IRC, page 15.

¹¹⁹ Exhibit B, Controller's Late Comments on the IRC, page 15.

¹²⁰ Exhibit B, Controller's Late Comments on the IRC, page 15.

¹²¹ Exhibit B, Controller's Late Comments on the IRC, pages 18-19.

¹²² Exhibit B, Controller's Late Comments on the IRC, page 18.

¹²³ Exhibit B, Controller's Late Comments on the IRC, page 19.

#### IV. Discussion

Government Code section 17561(d) authorizes the Controller to audit the claims filed by local agencies and school districts and to reduce any claim for reimbursement of state mandated costs that the Controller determines is excessive or unreasonable.

Government Code Section 17551(d) requires the Commission to hear and decide a claim that the Controller has incorrectly reduced payments to the local agency or school district. If the Commission determines that a reimbursement claim has been incorrectly reduced, section 1185.9 of the Commission's regulations requires the Commission to send the decision to the Controller and request that the costs in the claim be reinstated.

The Commission must review questions of law, including interpretation of the parameters and guidelines, de novo, without consideration of legal conclusions made by the Controller in the context of an audit. The Commission is vested with exclusive authority to adjudicate disputes over the existence of state-mandated programs within the meaning of article XIII B, section 6 of the California Constitution. The Commission must also interpret the Government Code and implementing regulations in accordance with the broader constitutional and statutory scheme. In making its decisions, the Commission must strictly construe article XIII B, section 6 and not apply it as an "equitable remedy to cure the perceived unfairness resulting from political decisions on funding priorities." 125

With regard to the Controller's audit decisions, the Commission must determine whether they were arbitrary, capricious, or entirely lacking in evidentiary support. This standard is similar to the standard used by the courts when reviewing an alleged abuse of discretion of a state agency. ¹²⁶ Under this standard, the courts have found that:

When reviewing the exercise of discretion, "[t]he scope of review is limited, out of deference to the agency's authority and presumed expertise: 'The court may not reweigh the evidence or substitute its judgment for that of the agency. [Citation.]" ... "In general ... the inquiry is limited to whether the decision was arbitrary, capricious, or entirely lacking in evidentiary support. . . ." [Citations.] When making that inquiry, the " "court must ensure that an agency has adequately considered all relevant factors, and has demonstrated a rational connection between those factors, the choice made, and the purposes of the enabling statute." [Citation.] "127

¹²⁴ Kinlaw v. State of California (1991) 54 Cal.3d 326, 331-334; Government Code sections 17551, 17552.

¹²⁵ County of Sonoma v. Commission on State Mandates (2000) 84 Cal.App.4th 1264, 1281, citing City of San Jose v. State of California (1996) 45 Cal.App.4th 1802, 1817.

¹²⁶ Johnston v. Sonoma County Agricultural Preservation and Open Space Dist. (2002) 100 Cal.App.4th 973, 983-984. See also American Bd. of Cosmetic Surgery, Inc. v. Medical Bd. of California (2008) 162 Cal.App.4th 534, 547.

¹²⁷ American Bd. of Cosmetic Surgery, Inc,v. Medical Bd. of California (2008) 162 Cal.App.4th, 534, 547-548.

The Commission must review the Controller's audit in light of the fact that the initial burden of providing evidence for a claim of reimbursement lies with the claimant. ¹²⁸ In addition, section 1185.1(f)(3) and 1185.2(d) and (e) of the Commission's regulations require that any assertions of fact by the parties to an IRC must be supported by documentary evidence. The Commission's ultimate findings of fact must be supported by substantial evidence in the record. ¹²⁹

# A. The Claimant Timely Filed this IRC Within Three Years From the Date It First Received From the Controller Written Notice of the Adjustment as Required by Former Section 1185.1 of the Commission's Regulations.

Government Code section 17561 authorizes the Controller to audit the reimbursement claims and records of local government to verify the actual amount of the mandated costs, and to reduce any claim that the Controller determines is excessive or unreasonable. If the Controller reduces a claim on a state-mandated program, the Controller is required to notify the claimant in writing, specifying the claim components adjusted, the amounts adjusted, interest charges on claims adjusted to reduce the overall reimbursement to the claimant, and the reason for the adjustment. The claimant may then file an IRC with the Commission "pursuant to regulations adopted by the Commission" contending that the Controller's reduction was incorrect and to request that the Controller reinstate the amounts reduced to the claimant.

To be complete, an IRC filing must be timely filed "no later than three years following the date of the Office of State Controller's final audit report, letter, remittance advice, or other written notice of adjustment to a reimbursement claim." ¹³²

Here, the Final Audit Report is dated June 15, 2012.¹³³ The IRC was filed with the Commission on June 9, 2015.¹³⁴ Less than three years having elapsed between the issuance of the final audit report and the filing of the IRC, this IRC was filed within the period prescribed in former Code of Regulations, title 2, section 1185.1.

Based on the foregoing, the Commission finds the IRC was timely filed.

 $^{^{128}\} Gilbert\ v.\ City\ of\ Sunnyvale\ (2005)\ 130\ Cal. App. 4th\ 1264,\ 1274-1275.$ 

¹²⁹ Government Code section 17559(b), which provides that a claimant or the state may commence a proceeding in accordance with the provisions of section 1094.5 of the Code of Civil Procedure to set aside a decision of the Commission on the ground that the Commission's decision is not supported by substantial evidence in the record.

¹³⁰ Government Code section 17558.5(c).

¹³¹ Government Code sections 17551(d), 17558.7; California Code of Regulations, title 2, sections 1185.1, 1185.9.

¹³² Former California Code of Regulations, title 2, sections 1185.1(c), 1185.2(a) (Register 2014, No. 21).

¹³³ Exhibit A, IRC, pages 4; 57.

¹³⁴ Exhibit A, IRC, page 1.

B. The Controller's Reductions Based on the Denial of Activities Included in the Claimant's Time Study that the Controller Found Were Beyond the Scope of the Mandate Are Correct as Matter of Law, and Not Arbitrary, Capricious, or Entirely Lacking in Evidentiary Support.

The Parameters and Guidelines for this program, adopted September 27, 2005, require that reimbursement be based on *actual costs* supported by contemporaneous source documents created at or near the same time the actual cost was incurred, as follows:

To be eligible for mandated cost reimbursement for any fiscal year, only actual costs may be claimed. Actual costs are those costs actually incurred to implement the mandated activities. Actual costs must be traceable and supported by source documents that show the validity of such costs, when they were incurred, and their relationship to the reimbursable activities. A source document is a document created at or near the same time the actual cost was incurred for the event or activity in question. Source documents may include, but are not limited to, employee time records or time logs, sign-in sheets, invoices, and receipts. 135

The claimant's original reimbursement claim documentation is comprised of forms and schedules containing administrator's assertions of estimated staff time spent on the mandate, which were then compiled to produce average times to perform the mandated activities, and translated into costs. The Controller rejected the claimant's initial claimed costs for fiscal years 2005-2006 through 2008-2009 "because they were based on average time increments supported with time records that were not completed contemporaneously." This amounts to a finding that the claimant did not comply with the contemporaneous source document rule, and did not claim actual costs, as required by the Parameters and Guidelines. There is no assertion or evidence in the record rebutting that finding. Pursuant to Government Code section 17564, reimbursement claims filed with the Controller shall be filed in the manner prescribed in the Parameters and Guidelines, and the Parameters and Guidelines, as a quasi-judicial decision of the Commission, are final and binding. The claimant failed to comply with the Parameters and Guidelines, and therefore the Controller could have reduced the entire claim to zero. Any such reduction would have been correct as a matter of law.

¹³⁵ Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3].

¹³⁶ Exhibit A, IRC, pages 85-366. See, e.g., Exhibit A, IRC, pages 101; 104-122; 124-125; 141.

¹³⁷ Exhibit A, IRC, page 65 [Final Audit Report, p. 6].

¹³⁸ See Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3]; *Clovis Unified School Dist. v. Chiang* (2010) 188 Cal.App.4th 794, 802-803 [Discussing non-enforceability of the Controller's Contemporaneous Source Document Rule when imposed only by Controller's Claiming Instructions, prior to valid incorporation within Parameters and Guidelines, a regulatory document].

¹³⁹ California School Boards Association v. State of California (2009) 171 Cal.App.4th 1183, 1201.

Instead, the Controller permitted the claimant to conduct a time study based on fiscal year 2010-2011 activities, "as a substitute for records of actual time spent on teacher evaluations." The results of that time study were then applied to the earlier audit period, and the issue before the Commission in this IRC is whether the Controller's adjustments to and application of the time study is arbitrary, capricious, or entirely lacking in evidentiary support.

The claimant's time study identified 22 discrete activities involved in the teacher evaluation process, and identified the time spent on each item, in order to determine average times to perform the reimbursable activities. ¹⁴¹ Those items included time for training, planning, preparation, meetings, observation, report writing, and other activities, for a total (average) of 10 hours, 38 minutes per evaluation. ¹⁴²

The Controller disallowed 19 of the 22 discrete activities of the time study, based on the following findings:

- (1) The activities related to planning, preparation, and organizing notes are not reimbursable under the mandate.
- (2) Training-related activities were included in the time study, but were also claimed as a direct cost item in each fiscal year. "We determined allowable time spend on training from the district's original claims."
- (3) Conferences between the evaluators and teachers are not reimbursable because they were required before the enactment of the test claim legislation. ¹⁴³

And, according to the claimant's narrative, the Controller also denied one activity related to evaluation and assessment of teachers with respect to their pupils' STAR testing results, and progress toward state standards.¹⁴⁴

The Controller found that each completed evaluation takes an average of 5 hours and 8 minutes, based on the three allowed activities from the claimant's time study. 145

The claimant disputes the disallowance of activities related to evaluation conferences, preparation and planning activities, and reviewing STAR test results. ¹⁴⁶ Specifically, the claimant argues that evaluation conferences are "a method of implementing this mandate, and not just a subject matter activity." ¹⁴⁷ The claimant further asserts that preparation activities were not explicitly considered or denied by the Test Claim Decision, and "[p]reparation is a rational,"

¹⁴⁰ Exhibit A, IRC, page 65 [Final Audit Report, p. 6].

¹⁴¹ See Exhibit A, IRC, page 11.

¹⁴² Exhibit A, IRC, page 65 [Final Audit Report, p. 6].

¹⁴³ Exhibit A, IRC, page 66 [Final Audit Report, p. 7].

¹⁴⁴ Exhibit A, IRC, page 16.

¹⁴⁵ Exhibit A, IRC, page 67 [Final Audit Report, p. 8].

¹⁴⁶ Exhibit A, IRC, pages 13-16.

¹⁴⁷ Exhibit A, IRC, page 13.

relevant, reasonable and necessary part of implementing the mandated activities in the usual course of business and the Controller has stated no basis to exclude it from the scope of the evaluation process." ¹⁴⁸ In addition, the claimant argues that the Test Claim Decision approved "the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees [that teach STAR test subjects], and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach." ¹⁴⁹

The Commission finds that the Controller's denial of the 19 activities included in the claimant's time study is correct as a matter of law, and not arbitrary, capricious, or without evidentiary support.

The Parameters and Guidelines limit reimbursement for evaluation and assessment of certificated employees as follows:

• Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee; and the employee's adherence to curricular objectives.

Reimbursement for this activity is limited to:

- o *review* of the employee's instructional techniques and strategies and adherence to curricular objectives, and
- include in the written evaluation of the certificated instructional employees the assessment of these factors during the specified evaluation periods.
- Evaluate and assess the performance of certificated instructional employees that teach [STAR test subjects, reading, writing, mathematics, etc.] in grades 2 to 11 as it reasonably relates to the progress of pupils toward [STAR test statewide standards].

Reimbursement for this activity is limited to:

- o *review* of the results of the STAR test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and
- o *include in the written evaluation* of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the specified evaluation periods.
- Evaluate and assess permanent *certificated*, *instructional and non-instructional employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation* in the years in which the permanent certificated employee would not have otherwise been evaluated.

¹⁴⁸ Exhibit A, IRC, pages 13-15.

¹⁴⁹ Exhibit A, IRC, page 16.

The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district. The following activities are reimbursable:

- evaluate and assess the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel;
- o the evaluation and assessment shall be reduced to writing. The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance;
- o transmit a copy of the written evaluation to the certificated employee;
- o attach any written reaction or response to the evaluation by the certificated employee to the employee's personnel file; and
- o conduct a meeting with the certificated employee to discuss the evaluation. 150

This is a very narrow higher level of service, and reimbursement is not required for the full evaluation and assessment of those certificated employees who have received satisfactory evaluations. For those employees, reimbursement is limited to the review and the inclusion of the new criteria mandated by the test claim statutes in the written evaluation. Further, the Parameters and Guidelines require the claimant to identify the state or federal law that mandates the educational program being performed by the employee being evaluated. ¹⁵¹

Nowhere in the time study documentation, the response to the Draft Audit Report, or the IRC narrative itself, does the claimant attempt to isolate the narrow higher level of service approved by the Commission in the Test Claim Decision, or to tie the 19 disallowed time study items to the approved activities. As explained in the Test Claim Decision, prior law already required evaluation of certificated employees. The test claim statutes merely added additional criteria to be considered within those evaluations, and required a follow-up evaluation when a

¹⁵⁰ Exhibit A, IRC, pages 31-33 [Parameters and Guidelines, pp. 4-6].

¹⁵¹ Exhibit A, IRC, pages 31-33 [Parameters and Guidelines, pp. 4-6].

¹⁵² Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, pages 18-25.

certificated employee receives an unsatisfactory evaluation and annual evaluations thereafter until the employee receives a satisfactory evaluation or, is separated from the school district. The time study activities proposed by the claimant make are not restricted to the time and costs of evaluations pertaining to only the new evaluation and assessment criteria, 154 nor are they limited to only those evaluations required for employees whose last regularly-scheduled evaluation resulted in an unsatisfactory rating. The Parameters and Guidelines require documentation to establish the relationship between the activities and costs claimed and the reimbursable activities stated in the Parameters and Guidelines. The claimant's time study activities (which generally include evaluation conferences, preparation and planning activities) are described too generally to establish that connection. 157

Furthermore, the activity proposed for claimant's time study related to STAR testing goes beyond the scope of the reimbursable activity. The claimant argues that the Commission approved "the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees [teaching STAR test subjects] and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach..."158 That description is substantially similar to and consistent with the Parameters and Guidelines, which indeed provide reimbursement to evaluate and assess the performance of teachers of STAR test subjects 159 "as it reasonably relates to the progress of pupils towards the state adopted academic content standards..." The Parameters and Guidelines also clarify that reimbursement for this activity is limited to "reviewing the results" of the STAR test and "including in the written evaluation...the assessment of the employee's performance based on the [STAR test] results for the pupils they teach." ¹⁶⁰ However, the activity stated in the claimant's proposed time study pertaining to STAR testing is "Discussing the STAR results with teachers and assessing how to improve instructional abilities." ¹⁶¹ The activity as described in the claimant's time study implies interaction between the teacher and the evaluator that is not required by the plain language of the approved activity as stated in the Parameters and Guidelines. Both reviewing the results of the STAR test, and

¹⁵³ Exhibit A, IRC, pages 31-32 [Parameters and Guidelines, pp. 4-5].

¹⁵⁴ Exhibit A, IRC, pages 31-32 [Parameters and Guidelines, pp. 4-5, Parts IV.A.1. & 2.].

¹⁵⁵ Exhibit A, IRC, page 32 [Parameters and Guidelines, p. 5, Part IV.B.1.].

¹⁵⁶ Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3]. Actual costs claimed "must be traceable and supported by source documents that show the validity of such costs, when they were incurred, and their relationship to the reimbursable activities."

¹⁵⁷ Exhibit A, IRC, pages 31-32 [Parameters and Guidelines, pp. 4-5].

¹⁵⁸ Exhibit A, IRC, page 16 [citing Test Claim Decision, *The Stull Act*, 98-TC-25, p. 31].

¹⁵⁹ Grades 2 through 11, teaching Reading, Writing, Mathematics, History/Social Science, and Science.

¹⁶⁰ Exhibit A, IRC, page 31 [Parameters and Guidelines, p. 4].

¹⁶¹ Exhibit A, IRC, page 13.

including an assessment in the written evaluation can be done unilaterally by the evaluator, and do not require a discussion.

And, to the extent certain elements of the claimant's time study related to evaluation conferences, preparation, and planning activities seem "rational, relevant, reasonable and necessary part[s] of implementing the mandated activities,"162 they are not identified as reimbursable activities in the Parameters and Guidelines. The claimant had an opportunity to include those activities within the Parameters and Guidelines as "reasonably necessary activities" pursuant to Government Code section 17557(a) and Code of Regulations, title 2, section 1183.7(d). Section 1183.7 describes the "Content of Parameters and Guidelines," and subdivision (d) defines "reasonably necessary activities" as those activities "necessary to comply with the statutes, regulations and other executive orders found to impose a state-mandated program." The section further states that "[w]hether an activity is reasonably necessary is a mixed question of law and fact," the assertion of which must be supported by documentary evidence submitted in accordance with section 1187.5. ¹⁶³ In other words, if the claimant seeks reimbursement for the various elements of its time study as "reasonably necessary" elements of the reimbursable mandate, those activities have to be approved by the Commission based on substantial evidence in the record and included within the Parameters and Guidelines, either when the Parameters and Guidelines were first adopted, or as an amendment request. ¹⁶⁴ To the extent the activities claimed exceed the scope of the mandate as stated in the Parameters and Guidelines, they are not eligible for reimbursement. The Parameters and Guidelines, as adopted, are binding on the parties. 165 The argument that such items are "reasonably necessary" cannot now be employed as an end-run around the Parameters and Guidelines.

Finally, it is the claimant's burden to establish actual costs, using "source documents that show the validity of such costs, when they were incurred, and *their relationship to the reimbursable activities*." The claimant argues that the Controller's reduction of costs is incorrect or arbitrary or capricious, and frames these issues in terms of the Controller's failure to state a reason for the reduction. The claimant, however, ignores its duty to establish the relationship to the reimbursable activities. The Controller's concession permitting the use of a time study does not alter the scope of the mandate, which is a question of law, or otherwise relieve the claimant of the burden to show that its claimed costs are eligible for reimbursement pursuant to the Test Claim Decision and Parameters and Guidelines. Moreover, there is no evidence in the record that the Controller's reduction of costs based on the denial of these 19 activities is arbitrary, capricious, or entirely lacking in evidentiary support.

¹⁶² Exhibit A, IRC, page 15.

¹⁶³ California Code of Regulations, title 2, section 1183.7.

¹⁶⁴ See California Code of Regulations, title 2, section 1183.17.

¹⁶⁵ California School Boards Association v. State of California (2009) 171 Cal.App.4th 1183, 1201

¹⁶⁶ Exhibit A, IRC, page 30 [Parameters and Guidelines, p. 3].

¹⁶⁷ See, e.g., Exhibit A, IRC, page 15 [Discussing "Preparation Activities," the claimant states that the Controller "has stated no basis to exclude it from the scope of the evaluation process."].

Accordingly, the Commission finds that the Controller's reduction of costs based on the Controller's denial of 19 of the activities included in claimant's time study is correct as a matter of law, and is not arbitrary, capricious, or entirely lacking in evidentiary support.

# C. The Controller's Disallowance of Completed Evaluations that Are Beyond the Scope of the Mandate Is Correct as a Matter of Law.

As noted above, the Parameters and Guidelines for *The Stull Act* program require reimbursement for the following:

- Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to
  - o the instructional techniques and strategies used by the employee; and
  - o the employee's adherence to curricular objectives;
- Evaluate and assess the performance of certificated instructional employees that teach [STAR test subjects, reading, writing, mathematics, etc.] in grades 2 to 11 as it reasonably relates to the progress of pupils toward [STAR test statewide standards]; and
- Evaluate and assess permanent certificated, instructional, and non-instructional employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated. The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district.¹⁶⁸

The Parameters and Guidelines further require the claimant to identify the state or federal law mandating the educational program being performed by the employee being evaluated and assessed. ¹⁶⁹

The Controller disallowed reimbursement for evaluations completed for employees that are not within the scope of the mandate. Specifically, as disputed here, the Controller disallowed reimbursement for evaluations of the following employees:

 Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists who are not certificated instructional employees; and

¹⁶⁸ Exhibit A, IRC, pages 31-33 [Parameters and Guidelines, pp. 4-6].

¹⁶⁹ Exhibit A, IRC, pages 31-33 [Parameters and Guidelines, pp. 4-6]. Note that this caveat is not stated under section IV.A.2. of the Parameters and Guidelines, with respect to certificated instructional employees that teach STAR test subjects in grades 2 to 11 (presumably because simply claiming costs under this very specific activity makes clear which state and federal laws are implicated).

• Preschool teachers [because they] do not perform the requirements of the program that is mandated by state or federal law. 170

The claimant argues that all certificated employees are "instructional personnel even if they are not 'classroom teachers'" and that preschool teachers are not excluded by the Parameters and Guidelines. ¹⁷¹ Addressing preschool instructors specifically, claimant argues that "[t]he audit report excludes preschool teachers in general based on the Controller's opinion that preschool teachers do not perform the requirements of an educational program mandated by state or federal law." ¹⁷² The claimant further argues that the Commission identified voluntary programs for which reimbursement is not required in a footnote in the Test Claim Decision, "and preschool is not included in that enumeration." ¹⁷³ Accordingly, claimant asserts that "[t]here is no stated basis to exclude certificated preschool instructors." ¹⁷⁴

With respect to other personnel, such as administrators, librarians, and others for whom evaluations and assessments were excluded from reimbursement, the claimant states that the audit report misstates the standard for judging which employees' evaluations are reimbursable and which are not:

The intent of this component is to evaluate the elements of classroom instruction. Principals, vice principals, directors, coordinators, counselors, psychologists, librarians, and library media specialists do not provide classroom instruction and are considered "non-instructional" certificated personnel.¹⁷⁵

The claimant concedes that "the portion of the mandate relating to the evaluation of compliance with the testing assessment standards (the STAR component) is limited to classroom teachers because the parameters and guidelines specifically state 'employees that teach' specified curriculum." However, the claimant maintains that all certificated employees are instructional personnel and that "[i]t has not been established as a matter of law that involvement in the educational process requires a 'classroom." ¹⁷⁷

The claimant is wrong on both counts. The Test Claim Decision analyzed at length the distinction between instructional and non-instructional personnel, in an attempt to isolate the higher level of service imposed by the test claim statutes. The Commission found that prior law "required school districts to develop evaluation and assessment guidelines and to evaluate both instructional and non-instructional certificated employees based on the guidelines on a

¹⁷⁰ Exhibit A, IRC, pages 73-74 [Final Audit Report, pp. 14-15].

¹⁷¹ Exhibit A, IRC, pages 18-19 and 71.

¹⁷² Exhibit A, IRC, page 18.

¹⁷³ Exhibit A, IRC, page 19.

¹⁷⁴ Exhibit A, IRC, page 19.

¹⁷⁵ Exhibit A, IRC, page 17 [quoting Controller's Final Audit Report, p. 15 (Exhibit A, IRC, p. 74)].

¹⁷⁶ Exhibit A, IRC, page 71 [Controller's Final Audit Report, p. 12].

¹⁷⁷ Exhibit A, IRC, page 18 and 71.

continuing basis."¹⁷⁸ The Commission also found case law to support the conclusion that the Stull Act, prior to the test claim statutes, applied to both instructional and non-instructional certificated personnel.¹⁷⁹ In analyzing the test claim statutes the Commission found, and the Department of Finance and the test claimant agreed, that the new categories of "instructional techniques and strategies," and "the employee's adherence to curricular objectives," represented new criteria for the evaluation and assessment of certificated *instructional* personnel equating the term "instructional" with "teachers."¹⁸⁰

Accordingly, Part IV.A.1. of the Parameters and Guidelines limits reimbursement for the higher level of service imposed by the test claim statutes to "certificated *instructional* employees," and to the *two new components* of the evaluation, both of which relate to the provision of *instruction*: "instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives." In addition, as noted, Part IV.A.1. *requires the claimant* to identify the state or federal law mandating the educational program being performed by the certificated instructional personnel. Therefore, this section provides reimbursement for evaluation and assessment of *instructional* employees only, and only those performing the requirements of educational programs mandated by state or federal law. Although administrators, librarians, counselors, and psychologists are positions requiring certification, they generally do not provide instruction to students. The claimant argues that these employees are *not excluded* by the

California Code of Regulations, title 5, section 80049.1 also authorizes a school counselor with a services credential to "develop, plan, implement and evaluate a school counseling and guidance program that includes academic, career, personal and social development; advocate for the higher academic achievement and social development of all students; provide school-wide prevention and intervention strategies and counseling services; provide consultation, training and staff development to teachers and parents regarding students' needs; and supervise a district-approved advisory program as described in Education Code Section 49600."

¹⁷⁸ Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, page 22.

¹⁷⁹ Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, pages 22-23.

¹⁸⁰ Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, pages 28-30; 21 [The plain language of these statutes does not distinguish between instructional employees (teachers) and non-instructional employees (principals, administrators), or specifically exclude certificated non-instructional employees.].

¹⁸¹ Exhibit A, IRC, page 31 [Parameters and Guidelines, p. 4].

¹⁸² Exhibit A, IRC, page 31 [Parameters and Guidelines, p. 4].

¹⁸³ Education Code section 44065, which governs teaching and services credential requirements. See also, California Code of Regulations, title 5, section 80049.1, which authorizes a school psychologist with a services credential to "provide services that enhance academic performance; design strategies and programs to address problems of adjustment; consult with other educators and parents on issues of social development, behavioral and academic difficulties; conduct psycho-educational assessments for purposes of identifying special needs; provide psychological counseling for individuals, groups and families; and coordinate intervention strategies for management of individual and school-wide crises."

Parameters and Guidelines, but neither do they necessarily fall within the higher level of service that the Commission determined to be reimbursable, absent some evidence that they are indeed performing the requirements of educational programs mandated by state or federal law; a requirement that the Parameters and Guidelines expressly requires the claimant to establish and for which the claimant has submitted no evidence. Thus, the Controller correctly concludes that "instructional" employees excludes administrators, librarians, counselors, and psychologists, and others, absent additional evidence. ¹⁸⁴

With regard to preschool instruction, the claimant mistakenly relies on a footnote in the Test Claim Decision, which listed examples of voluntary educational programs funded by the Budget Act, to suggest that preschool instruction, which was not among the programs listed, must therefore be mandatory. The list in the Test Claim Decision was not intended to represent an exhaustive cataloging of voluntary (or non-mandatory) educational programs, as the claimant suggests. Rather, the Parameters and Guidelines expressly require the claimant to specifically identify the educational programs mandated by state or federal law being performed by the certificated instructional employee in order to get reimbursed for the evaluation, which the claimant has not done. In addition, Education Code section 48200 et seq., provides for compulsory education for pupils aged 6 to 18, but does not as a matter of law apply to preschoolaged children. The claimant argues that federal special education law requires preschool instruction for pupils when part of a pupil's Individualized Education Plan. However, the claimant has not provided any evidence that preschool teachers evaluated and claimed provided

California Code of Regulations, title 5, section 80053, authorizes the librarian with a services credential to "instruct students in accessing, evaluating, using and integrating information and resources in the library program; to plan and coordinate school library programs with the instructional programs of a school district through collaboration with teachers; to select materials for school and district libraries; to develop programs for and deliver staff development for school library services; to coordinate or supervise library programs at the school, district or county level; to plan and conduct a course of instruction for those pupils who assist in the operation of school libraries; to supervise classified personnel assigned school library duties; and to develop procedures for and management of the school and district libraries."

California Code of Regulations, title 5, section 80054.5, authorizes the school administrator with a services credential to develop, coordinate, and assess instructional programs; supervise and evaluate certificated and classified personnel; discipline students; manage fiscal services; develop, coordinate, and supervise student support services.

And, Code of Regulations, title 5, section 16043 states that persons employed by a school district as librarians may supplement classroom instruction, or conduct "a planned course of instruction for those pupils who assist in the operation of school libraries."

¹⁸⁴ Exhibit A, IRC, pages 73-74 [Final Audit Report, pp. 14-15].

¹⁸⁵ Exhibit A, IRC, pages 18-19.

¹⁸⁶ Exhibit X, Test Claim Decision, *The Stull Act*, 98-TC-25, page 12, Fn 42.

¹⁸⁷ Exhibit A, IRC, pages 71-74 [Controller's Final Audit Report, pp. 12-15].

instruction in educational programs mandated by federal law, as required by the Parameters and Guidelines.

In addition, Part IV.A.2. requires reimbursement only for evaluations of "certificated instructional employees that teach..." STAR test subjects in grades 2 to 11. 188 This provision also excludes non-instructional administrative and support personnel, and excludes preschool teachers, based on nothing more than its plain language.

Part IV.B.1. does provide for reimbursement for evaluation and assessment of certificated instructional *and* non-instructional employees, but only those whose last regularly-scheduled evaluation resulted in an unsatisfactory evaluation (i.e., off-year evaluations for permanent certificated employees, and more often than once every five years for permanent "tenured" certificated employees). Part IV.B.1. also includes the same caveat as above, that the claimant must identify the state or federal law mandating the educational program being performed. There has been no specific argument or evidence in the record to support a finding that any of the non-instructional personnel whose evaluations were disallowed were evaluated on the basis of having a previously unsatisfactory evaluation.

The claimant, with all of its arguments, attempts to shift the burden to the Controller to support its reductions, but it is the claimant's burden to make out its claim. In addition, sections 1185.1(f)(3), 1185.2(d) and (e)of the Commission's regulations require that any assertions of fact by the parties to an IRC must be supported by documentary evidence. The Parameters and Guidelines specifically and expressly require the *claimant* to identify the state or federal law mandating the educational program being performed by the employee(s) evaluated, except in the case of STAR subject instructors in grades 2 to 11 (for whom the mandatory nature of the educational program is presumed). The claimant has not complied with the Parameters and Guidelines.

Based on the foregoing, the Commission finds that the Controller's disallowance of 46 completed evaluations that were beyond the scope of the mandate is correct as a matter of law and not arbitrary, capricious, or entirely lacking in evidentiary support.

#### V. Conclusion

Based on the foregoing, the Commission finds that the IRC was timely filed and denies this IRC. The Commission finds that the Controller's reduction of costs based the denial of 19 activities included in the claimant's time study and the disallowance of 46 completed evaluations that were beyond the scope of the mandate, are correct as a matter of law and not arbitrary, capricious, or entirely lacking in evidentiary support.

¹⁸⁸ Exhibit A, IRC, pages 31-32 [Parameters and Guidelines, pp. 4-5].

¹⁸⁹ Gilbert v. City of Sunnyvale (2005) 130 Cal.App.4th 1264, 1274-1275.

¹⁹⁰ Exhibit A, IRC, pages 31-33 [Parameters and Guidelines, pp. 4-6].

#### **DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On May 22, 2018, I served the:

• Draft Proposed Decision, Schedule for Comments, and Notice of Hearing issued May 22, 2018

The Stull Act, 14-9825-I-02

Education Code Sections 44660-44665;

Statutes 1983, Chapter 498; Statutes 1999, Chapter 4

Fiscal Years: 2005-2006, 2006-2007, 2007-2008, and 2008-2009

Carlsbad Unified School District, Claimant

by making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on May 22, 2018 at Sacramento, California.

Jill L. Magee

Commission on State Mandates 980 Ninth Street, Suite 300 Sacramento, CA 95814

(916) 323-3562

## **COMMISSION ON STATE MANDATES**

#### **Mailing List**

Last Updated: 5/22/18

**Claim Number:** 14-9825-I-02

Matter: The Stull Act

Claimant: Carlsbad Unified School District

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Each commission mailing list is continuously updated as requests are received to include or remove any party or person on the mailing list. A current mailing list is provided with commission correspondence, and a copy of the current mailing list is available upon request at any time. Except as provided otherwise by commission rule, when a party or interested party files any written material with the commission concerning a claim, it shall simultaneously serve a copy of the written material on the parties and interested parties to the claim identified on the mailing list provided by the commission. (Cal. Code Regs., tit. 2, § 1181.3.)

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RECEIVED

May 29, 2018

Commission on
State Mandates

# BETTY T. YEE California State Controller

May 23, 2018

Heather Halsey, Executive Director Commission on State Mandates 980 Ninth Street, Suite 300 Sacramento, CA 95814

Re: Draft Proposed Decision

Incorrect Reduction Claim

The Stull Act, 14-9825-I-02

Education Code Sections 44660-44665;

Statutes of 1983, Chapter 498; Statutes of 1999, Chapter 4

Fiscal Years: 2005-2006, 2006-2007, 2007-2008, and 2008-09

Carlsbad Unified School District, Claimant

Dear Ms. Halsey:

The State Controller's Office has reviewed the Commission on State Mandates' (Commission) draft proposed decision dated May 22, 2018, for the above incorrect reduction claim filed by Carlsbad Unified School District. We agree with the Commission's conclusion to support our reduction of costs claimed for fiscal years (FY) 2005-06 through FY 2008-09.

If you have any questions, please contact me by telephone at (916) 327-3138.

Sincerely,

LISA KUROKAWA, Bureau Chief

**Division of Audits** 

LK/kw

19132

#### **DECLARATION OF SERVICE BY EMAIL**

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95814.

On May 29, 2018, I served the:

• Controller's Comments on the Draft Proposed Decision filed May 29, 2018

The Stull Act, 14-9825-I-02

Education Code Sections 44660-44665;

Statutes 1983, Chapter 498; Statutes 1999, Chapter 4

Fiscal Years: 2005-2006, 2006-2007, 2007-2008, and 2008-2009

Carlsbad Unified School District, Claimant

By making it available on the Commission's website and providing notice of how to locate it to the email addresses provided on the attached mailing list.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on May 29, 2018 at Sacramento, California.

Lorenzo Duran

Commission on State Mandates 980 Ninth Street, Suite 300 Sacramento, CA 95814

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### **COMMISSION ON STATE MANDATES**

#### **Mailing List**

Last Updated: 5/22/18

**Claim Number:** 14-9825-I-02

Matter: The Stull Act

Claimant: Carlsbad Unified School District

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# BEFORE THE COMMISSION ON STATE MANDATES STATE OF CALIFORNIA

IN RE TEST CLAIM ON:

Education Code Sections 44660-44665 (Former Ed. Code, §§ 13485-13490);

Statutes 1975, Chapter 1216; Statutes 1983, Chapter 498; Statutes 1986, Chapter 393; Statutes 1995, Chapter 392; Statutes 1999, Chapter 4;

Filed on July 7, 1999;

By Denair Unified School District, Claimant.

No. 98-TC-25

The Stull Act

STATEMENT OF DECISION PURSUANT TO GOVERNMENT CODE SECTION **17500** ET SEQ.; CALIFORNIA CODE OF REGULATIONS, TITLE 2, DIVISION 2, CHAPTER 2.5, ARTICLE 7

(Adopted on May 27, 2004)

#### STATEMENT OF DECISION

The attached Statement of Decision of the Commission on State Mandates is hereby adopted in the above-entitled matter.

PAULA HIGASHI, Executive Director

Date

6-1-2004

#### BEFORE THE

## COMMISSION ON STATE MANDATES

#### STATE OF CALIFORNIA

IN RE TEST CLAIM ON:

Education Code Sections 44660-44665 (Former Ed. Code, §§ 1348513490);

Statutes 1975, Chapter 1216; Statutes 1983, Chapter 498; Statutes 1986, Chapter 393; Statutes 1995, Chapter 392; Statutes 1999, Chapter 4;

Filed on July 7, 1999;

By Denair Unified School District, Claimant.

No. 98-TC-25

The Stull Act

STATEMENT OF DECISION PURSUANT TO GOVERNMENT CODE SECTION 17500 ET SEQ.; CALIFORNIA CODE OF REGULATIONS, TITLE 2, DIVISION 2, CHAPTER 2.5, ARTICLE 7

(Adopted on May 27, 2004)

#### PROPOSED STATEMENT OF DECISION

The Commission on State Mandates (Commission) heard and decided this test claim during a regularly scheduled hearing on May 27, 2004. David E. Scribner appeared for the claimant, Denair Unified School District. Barbara Taylor appeared for the Department of Finance.

The law applicable to the Commission's determination of a reimbursable state-mandated program is article XIII B, section 6 of the California Constitution, Government Code section 17500 et seq., and related case law.

The Commission adopted the staff analysis at the hearing by a vote of 4 to 0.

#### **BACKGROUND**

This test claim addresses the Stull Act. The Stull Act was originally enacted in 197 1 to establish a uniform system of evaluation and assessment of the performance of "certificated personnel" within each school district. (Former Ed. Code, §§ 13485-13490.)¹ The Stull Act required the governing board of each school district to develop and adopt specific guidelines to evaluate and assess certificated personnel², and to avail itself of the advice of certificated instructional personnel before developing and adopting the guidelines.' The evaluation and assessment of the certificated personnel was required to be reduced to writing and a copy transmitted to the employee no later than sixty days before the end of the school year.⁴ The employee then had the right to initiate a written response to the evaluation, which became a permanent part of the

² Former Education Code section 13487.

³ Former Education Code section 13486.

⁴ Former Education Code section 13488.

Statutes 197 1, chapter 361.

employee's personnel file.⁵ The school district was also required to hold a meeting with the employee to discuss the evaluation!

Former Education Code section 13489 required that the evaluation and assessment be continuous. For probationary employees, the evaluation had to occur once each school year. For permanent employees, the evaluation was required every other year. Fonner section 13489 also required that the evaluation include recommendations, if necessary, for areas of improvement in the performance of the employee. If the employee was not performing his or her duties in a satisfactory manner according to the standards, the "employing authority" was required to notify the employee in writing, describe the unsatisfactory performance, and confer with the employee malting specific recommendations as to areas of improvement and endeavor to assist in the improvement.

In 1976, the Legislature renumbered the provisions of the Stull Act. The Stull Act can now be found in Education Code sections 44660-44665.

The test claim legislation, enacted between 1975 and 1999, amended the Stull Act. The claimant alleges that the amendments constitute a reimbursable state-mandated program within the meaning of article XIII B, section 6 of the California Constitution."

In addition, the claimant, a school district, alleges that compliance with the Stull Act is new as to county offices of education and, thus, counties are entitled to reimbursement for all activities under the Stull Act. ¹⁰

However, no county office of education has appeared in this action as a claimant, nor filed a declaration alleging mandated costs exceeding \$1000, as expressly required by Government Code section 17564 and section 1183 of the Commission's regulations.

Therefore, the test claim has not been perfected as to county offices of education. The findings in this analysis, therefore, are limited to school districts.

⁶ Ibid.

⁵ Ibid.

⁷ Former Education Code section 13490 defined "employing authority" as "the superintendent of the school district in which the employee is employed, or his designee, or in the case of a district which has no superintendent, a school principal or other person designated by the governing board."

⁸ Statutes 1976, chapter 1010.

⁹ In 1999, the Legislature added Education Code section 44661.5 to the Stull Act. (Stats. 1999, ch. 279.) Education Code section 44661.5 authorizes a school district to include objective standards from the National Board for Professional Teaching Standards or any objective standards from the California Standards for the Teaching Profession when developing evaluation and assessment guidelines. The claimant did not include Education Code section 4466 1.5 in this test claim.

¹⁰ Exhibit A (Test Claim, pages 7-9) to Item 9 of the May 27, 2004 Commission Hearing.

#### Claimant's Position

The claimant contends that the test claim legislation constitutes a reimbursable state-mandated program for the following "new" activities:

- Rewrite standards for employee assessment to reflect expected student "achievement" (as opposed to the prior requirement of expected student "progress") and to expand the standards to reflect expected student achievement at each "grade level." (Stats. 1975, ch. 1216.)
- Develop job responsibilities for certificated non-instructional personnel, including but not limited to, supervisory and administrative personnel. (Stats. 1975, ch. 1216.)
- Assess and evaluate non-instructional personnel. (Stats. 1975, ch. 1216; Stats. 1995, ch. 392.)
- Receive and review responses from certificated non-instructional personnel regarding the employee's evaluation. (Stats. 1986, ch. 393.)
- Conduct a meeting between the certificated non-instructional employee and the evaluator to discuss the evaluation and assessment. (Stats. 1986, ch. 393.)
- Conduct additional evaluations of certificated employees who receive an unsatisfactory evaluation. (Stats. 1983, ch. 498.)
- Review the results of a certificated instructional employee's participation in the Peer Assistance and Review Program for Teachers as part of the assessment and evaluation. (Stats. 1999, ch. 4.)
- Assess and evaluate the performance of certificated instructional personnel as it relates to the instructional techniques and strategies used and the employee's adherence to curricular objectives. (Stats. 1983, ch. 498.)
- Assess and evaluate certificated instructional personnel as it relates to the progress of pupils towards the state adopted academic content standards, if applicable, as measured by state adopted criterion referenced assessments. (Stats. 1999, ch. 4.)
- Assess and evaluate certificated personnel employed by county superintendents of education. (Stats. 1975, ch. 1216.)¹¹

#### **Department of Finance's Position**

The Department of Finance filed comments on March 6, 2001, contending that most of the activities requested by the claimant do not constitute reimbursable state-mandated activities. The Department of Finance states, however, that the following activities "may" be reimbursable:

 Assess and evaluate the performance of certificated instructional personnel as it relates to the progress of students toward the attainment of state academic standards, as measured by state-adopted assessments.

¹¹ Exhibit A (Test Claim) to Item 9 of the May 27, 2004 Commission Hearing.

- Modification of assessment and evaluation methods to determine whether instructional staff is adhering to the curricular objectives and instructional techniques and strategies associated with the updated state academic standards.
- Assess and evaluate permanent certificated staff that has received an unsatisfactory
  evaluation at least once each year, until the employee receives a satisfactory evaluation,
  or is separated from the school district.
- Implementation of the Stull Act by county offices of education."

#### Discussion

The courts have found that article XIII B, section 6 of the California Constitution¹³ recognizes the state constitutional restrictions on the powers of local government to tax and spend. ¹⁴ "Its purpose is to preclude the state from shifting financial responsibility for carrying out governmental functions to local agencies, which are 'ill equipped' to assume increased financial responsibilities because of the taxing and spending limitations that articles XIII A and XIII B impose." ¹⁵ A test claim statute or executive order may impose a reimbursable state-mandated program if it orders or commands a local agency or school district to engage in an activity or task. ¹⁶ In addition, the required activity or task must be new, constituting a "new program," or it must create a "higher level of service" over the previously required level of service.

¹² Exhibit B to Item 9 of the May 27, 2004 Commission Hearing.

¹³ Article XIII B, section 6 provides: "Whenever the Legislature or any state agency mandates a new program or higher level of service on any local government, the state shall provide a subvention of funds to reimburse **such** local government for the costs of such program or increased level of service, except that the Legislature may, but need not, provide such subvention of funds for the following mandates: (a) Legislative mandates requested by the local agency affected; (b) Legislation defining a new crime or changing an existing definition of a crime; or (c) Legislative mandates enacted prior to January 1, 1975, or executive orders or regulations initially implementing legislation enacted prior to January 1, 1975."

¹⁴ Department of Finance v. Commission on State Mandates (2003) 30 Cal.4th 727, 735.

¹⁵ County of San Diego v. State of California (1997) 15 Cal.4th 68, 81.

Long Beach Unified School Dist.v. State of California (1990) 225 Cal.App.3d 155, 174. In Department of Finance v. Commission on State Mandates, supra, 30 Cal.4th at page 742, the court agreed that "activities undertaken at the option or discretion of a local government entity (that is, actions undertaken without any legal compulsion or threat of penalty for nonparticipation) do not trigger a state mandate and hence do not require reimbursement of funds - even if the local entity is obligated to incur costs as a result of its discretionary decision to participate in a particular program or practice." The court left open the question of whether non-legal compulsion could result in a reimbursable state mandate, **such** as in a case where failure to participate in a program results in severe penalties or "draconian" consequences. (*Id.*, at p. 754.)

¹⁷ Lucia Mar Unified School District v. Honig (1988) 44 Cal.3d 830, 835-836.

The courts have defined a "program" subject to article XIII B, section 6, of the California Constitution, as one that carries out the governmental function of providing public services, or a law that imposes unique requirements on local agencies or school districts to implement a state policy, but does not apply generally to all residents and entities in the state? To determine if the program is new or imposes a higher level of service, the test claim legislation must be compared with the legal requirements in effect immediately before the enactment of the test claim legislation." Finally, the newly required activity or increased level of service must impose costs mandated by the state. ²⁰

The Commission is vested with exclusive authority to adjudicate disputes over the existence of state-mandated programs within the meaning of article XIII B, section 6.²¹ In malting its decisions, the Commission must strictly construe article XIII B, section 6 and not apply it as an "equitable remedy to cure the perceived unfairness resulting from political decisions on funding priorities."

### Issue 1: Is the test claim legislation subject to article XIII B, section 6 of the California Constitution?

<u>Certain statutes in the test claim legislation do not require school districts to perform activities and, thus, are not subject to article XIII B, section 6.</u>

In order for a statute to be subject to article XIII B, section 6 of the California Constitution, the statutory language must require local agencies or school districts to perform an activity or task. If the statutory language does not mandate local agencies or school districts to perform a task, then compliance with the test claim statute is within the discretion of the local entity and a reimbursable state-mandated program does not exist.

Here, there are two test claim statutes, Education Code section 44664, subdivision (b) (as amended by Stats. 1983, ch, 498 and Stats. 1999, ch. 4) and Education Code section 44662, subdivision (d) (as amended by Stats. 1999, ch. 4) that do not require school districts to perform activities and, thus, are not subject to article XIII B, section 6 of the California Constitution.

Education Code section 44664, sub&vision (b), as amended by Statutes 1983, chapter 498. In 1983, the Legislature amended Education Code section 44664 by adding subdivision (b). Subdivision (b) authorizes a school district to require a certificated employee that receives an

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¹⁸ County of Los Angeles v. State of California (1987) 43 Cal.3d 46, 56; Lucia Mar, supra, 44 Cal.3d 830, 835.

¹⁹ Lucia Mar, supra, 44 Cal.3d 830, 835.

²⁰ County of Fresno v. State of California (1991) 53 Cal.3d 482, 487; County of Sonoma v. Commission on State Mandates (2000) 84 Cal.App.4th 1265, 1284; Government Code sections 17514 and 17556.

²¹ Kinlaw v. State of California (1991) 54 Cal.3d 326, 331-334; Government Code sections 17551, 17552.

²² City of San Jose v. State of California (1996) 45 Cal.App.4th 1802, 18 17; County of Sonoma, supra, 84 Cal.App.4th 1265, 1280.

unsatisfactory evaluation to participate in a program to improve the employee's performance. Education Code section 44664, subdivision (b), stated the following:

Any evaluation performed pursuant to this article which contains an unsatisfactory rating of an employee's performance in the area of teaching methods or instruction *may* include the requirement that the certificated employee shall, as detennined by the employing authority, participate in a program designed to improve appropriate areas of the employee's performance and to further pupil achievement and the instructional objectives of the employing authority. (Emphasis added.)

The plain language of the statute authorizes, but does not mandate, a school district to require i ts certificated employees to participate in a program designed to improve performance if the employee receives an unsatisfactory evaluation. Thus, the Commission finds that Education Code section 44664, subdivision (b), as amended by Statutes 1983, chapter 498, does not mandate school districts to perform an activity and, thus, it is not subject to article XIII B, section 6 of the California Constitution.

Education Code section 44662, subdivision (d), and Education Code section 44664, subdivision (b), as amended by Statutes 1999, chapter 4. In 1999, the Legislature amended Education Code section 44664, subdivision (b), by adding the following underlined sentence:

Any evaluation performed pursuant to this article which contains an unsatisfactory rating of an employee's performance in the area of teaching methods or instruction may include the requirement that the certificated employee shall, as determined by the employing authority, participate in a program designed to improve appropriate areas of the employee's performance and to further pupil achievement and the instructional objectives of the employing authority. If a district participates in the Peer Assistance and Review Program for Teachers established pursuant to Article 4.5 (commencing with Section 44500), any certificated employee who receives an unsatisfactory rating on an evaluation performed pursuant to this section shall participate in the Peer Assistance and Review Program for Teachers.

The 1999 test claim legislation also amended Education Code section 44662 by adding subdivision (d), which states:

Results of an employee's participation in the Peer Assistance and Review Program for Teachers established by Article 4.5 (commencing with Section 44500) shall be made available as part of the evaluation conducted pursuant to this section.

The claimant requests reimbursement to "receive and review, for purposes of a certificated employee's assessment and evaluation, if applicable, the results of an employee's participation in the Peer Assistance and Review Program for Teachers established by Article 4.5 (commencing with section 44500.)""

²³ Exhibit A (Test Claim, page 7) to Item 9 of the May 27, 2004 Commission Hearing.

The Department of Finance contends that reviewing the results of the Peer Assistance and Review Program, as part of the Stull Act evaluation of the employee's performance, is not a reimbursable state-mandated activity because participation in the Peer Assistance and Review Program is voluntary.²⁴

In response to the Department of Finance, the claimant states the following:

The legislative intent behind the amendments to the Stull Act was to ensure that school districts adopt objective, uniform evaluation and assessment guidelines that effectively assess certificated employee performance. To meet this desired goal, school districts that participate in the Peer Assistance and Review Program must include an employee's results of participation in the employee's evaluation. If this information was not considered by the district, inconsistent, incomplete, and inaccurate evaluations and assessments would occur a result contrary to the Legislature's stated intent. Therefore, the claimant contends that the activities associated with the receipt and review of an employee's participation in the Peer Assistance and Review Program impose reimbursable state-mandated activities upon school districts.²⁵

For the reasons described below, the Commission finds that the receipt and review of the results of an employee's participation in the Peer Assistance and Review Program is not a statemandated activity and, therefore, the 1999 amendments to Education Code sections 44662 and 44664 are not subject to article XIII B, section 6 of the California Constitution.

In *Department of Finance* v. *Commission* on *State Mandates*²⁶, the Supreme Court reviewed test claim legislation that required school site councils to post a notice and an agenda of their meetings. The court determined that school districts were not legally compelled to establish eight of the nine school site councils and, thus, school districts were not mandated by the state to comply with the notice and agenda requirements for these school site councils." The court reviewed the ballot materials for article XIII B, which provided that "a state mandate comprises something that a local government entity is required or forced to do." The ballot summary by the Legislative Analyst further defined "state mandates" as "requirements imposed on local governments by legislation or executive orders."

The court also reviewed and affirmed the holding of the *City of Merced* case.^{30, 31} The court stated the following:

³⁰ Id. at page 743,

²⁴ Exhibit B to Item 9 of the May 27, 2004 Commission Hearing.

²⁵ Exhibit C (Claimant Rebuttal, page 7) to Item 9 of the May 27, 2004 Commission Hearing.

²⁶ Department of Finance, supra, 20 Cal.4th 727.

²⁷ *Id.* at page 731.

²⁸ *Id.* at page 737.

²⁹ *Ibid*.

³¹ City of Merced v. State of California (1984) 153 Cal.App.3d 777.

In *City of Merced*, the city was under no legal compulsion to resort to eminent domain-but when it elected to employ that means of acquiring property, its obligation to compensate for lost business goodwill was not a reimbursable state mandate, because the city was not required to employ eminent domain in the first place. Here as well, if a school district elects to participate in or continue participation in any underlying *voluntary* education-related funded program, the district's obligation to comply with the notice and agenda requirements related to that program does not constitute a reimbursable state mandate. (Emphasis in original.)³²

Thus, the Supreme Court held as follows:

[W]e reject claimants' assertion that they have been legally compelled to incur notice and agenda costs, and hence are entitled to reimbursement from the state, based merely upon the circumstance that notice and agenda provisions are mandatory elements of education-related programs in which claimants have participated, without regard to whether claimant's participation in the underlying program is voluntary or compelled. [Emphasis added.]³³

The Supreme Court left undecided whether a reimbursable state mandate "might be found in circumstances short of legal compulsion-for example, if the state were to impose a substantial penalty (independent of the program funds at issue) upon any local entity that declined to participate in a given program."³⁴

The decision of the California Supreme Court in *Departnzent of Finance* is relevant and its reasoning applies in this case. The Supreme Court explained that "the proper focus under a legal compulsion inquiry is upon the nature of the claimants' participation in the underlying programs themselves." Thus, based on the Supreme Court's decision, the Commission is required to determine if the underlying program (in this case, participation in the Peer Assistance and Review Program) is a voluntary decision at the local level or is legally compelled by the state.

The Peer Assistance and Review Program and the amendment to the Stull Act to reflect the Peer Assistance and Review Program were sponsored by Governor Davis and were enacted by the Legislature during the 1999 special legislative session on education. As expressly provided in the legislation, the intent of the Legislature, in part, was to coordinate the Peer Assistance and Review Program with the evaluations of certificated employees under the Stull Act. Section 1 of the 1999 test claim legislation states the following:

It is the intent of the Legislature to establish a teacher peer assistance and review system as a critical feedback mechanism that allows exemplary teachers to assist

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³² *Ibid*.

³³ *Id.* at page 731.

³⁴ Ibid.

³⁵ *Id.* at page 743.

veteran teachers in need of development in subject matter knowledge or teaching strategies, or both,

It is further the intent of the Legislature that a school district that operates a program pursuant to Article 4.5 (commencing with Section 44500) of Chapter 3 of Part 25 of the Education Code coordinate its employment policies and procedures for that program with its activities for professional staff development, the Beginning Teacher Support and Assessment Program, and the biennial evaluations of certificated employees required pursuant to Section 44664 [of the S tull Act].

The plain language of Education Code section 44500, subdivision (a), authorizes, but does not require, school districts to participate in the Peer Assistance and Review Program. That section states in pertinent part that "[t]he governing board of a school district and the exclusive representative of the certificated employees in the school district *may* develop and implement a program authorized by this article that meets local conditions and conforms with the principles set forth in subdivision (b)." (Emphasis added.) If a school district implements the program, the program must assist a teacher to improve his or her teaching skills and knowledge, and provide that the final evaluation of a teacher's participation in the program be made available for placement in the personnel file of the teacher receiving assistance. (Ed. Code, § 44500, subd. (b).) Furthermore, school districts that participate in the Peer Assistance and Review Program receive state funding pursuant to Education Code sections 44505 and 44506.

Therefore, the Commission finds that school districts are not legally compelled to participate in the Peer Assistance and Review Program and, thus, not legally compelled to receive and review the results of the program as part of the Stull Act evaluation.

The Commission further finds that school districts are not practically compelled to participate in the Peer Assistance and Review Program and review the results as part of the Stull Act evaluation. In *Department of Finance*, the California Supreme Court, when considering the practical compulsion argument raised by the school districts, reviewed its earlier decision in City of Sacramento v. State of California (1990) 50 Cal.3d 51.36 The City of Sacramento case involved test claim legislation that extended mandatory coverage under the state's unemployment insurance law to include state and local governments and nonprofit corporations. The state legislation was enacted to conform to a 1976 amendment to the Federal Unemployment Tax Act, which required for the first time that a "certified" state plan include unemployment coverage of employees of public agencies, States that did not comply with the federal amendment faced a loss of a federal tax credit and an administrative subsidy.³⁷ The local agencies, knowing that federally mandated costs are not eligible for state subvention, argued against a federal mandate. The local agencies contended that article XIII B, section 9 requires clear legal compulsion not present in the Federal Unemployment Tax Act.³⁸ The state, on the other hand, contended that California's failure to comply with the federal "carrot and stick" scheme was so substantial that the state had no realistic "discretion" to refuse. Thus, the state

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³⁶ Department of Finagora, e, 30at Cal.4phge 49-751.

³⁷ City of Sacransupra, 50 at Cal. 3 ages 57-58.

³⁸ Id. at page 71.

contended that the test claim statute merely implemented a federal mandate and that article XIII B, section 6 does not require strict legal compulsion to apply.³⁹

The Supreme Court in *City of Sacramento* concluded that although local agencies were not strictly compelled to comply with the test claim legislation, the legislation constituted a federal mandate. The Supreme **Court** concluded that because the financial consequences to the state and its residents for failing to participate in the federal plan were so onerous and punitive, and the consequences amounted to "certain and severe federal penalties" including "double taxation" and other "draconian" measures, the state was mandated by federal law to participate in the plan.""

The Supreme Court applied the same analysis in the *Department of Finance* case and found that the practical compulsion finding for a state mandate requires a showing of "certain and severe penalties" such as "double taxation" and other "draconian" consequences. The <code>court</code> stated the following:

Even assuming, for purposes of analysis only, that our construction of the term "federal mandate" in *City of Sacramento* [citation omitted], applies equally in the context of article XIII B, section 6, for reasons set below we conclude that, contrary to the situation we described in that case, claimants here have not faced "certain and severe . . . penalties" such as "double . . . taxation" and other "draconian" consequences . , . ⁴¹

Although there are statutory consequences for not participating in the Peer Assistance and Review Program, the Commission finds, as explained below, that the consequences do not constitute the type of draconian penalties described in the *Department of Finance* case.

Pursuant to Education Code section 44504, subdivision (b), school districts that do not participate in the Peer Assistance and Review Program are not eligible to receive state funding for specified programs. Education Code section 44504, subdivision (b), states the following:

A school district that does not elect to participate in the program authorized under this article by July 1, 200 1, is not eligible for any apportionment, allocation, or other funding from an appropriation for the program authorized pursuant to this article or for any apportionments, allocations, or other funding from funding for local assistance appropriated pursuant to the Budget Act Item 6 11 O-23 I-000 1, funding appropriated for the Administrator Training and Evaluation Program set forth in Article 3 (commencing with Section 44681) of Chapter 3.1 of Part 25, from an appropriation for the Instructional Time and Staff Development Reform Program as set forth in Article 7.5 (commencing with Section 44579) of Chapter 3, or from an appropriation for school development plans as set forth in Article 1 (commencing with Section 44670.1) of Chapter 3.1 and the Superintendent of Public Instruction shall not apportion, allocate, or otherwise provide any funds to the district pursuant to those programs.

³⁹ *Ibid*.

⁴⁰ *Id.* at pages 73-76.

⁴¹ Department of Finance, supra, 30 Cal.4th at page 75 1.

The funding appropriated under the programs specified in Education Code section 44504, subdivision (b), are not state-mandated programs. Most are categorical programs undertaken at the discretion of the school district in order to receive grant funds. For example, the funding appropriated pursuant to the Budget Act Item 6 11 O-23 I-0001 is local assistance funding to school districts "for the purpose of the Proposition 98 educational programs specified in subdivision (b) of Section 12.40 of this act." (Stats. 1999, ch. 50, State Budget Act.) The education programs specified in subdivision (b) of Section 12.40 of the 1999 State Budget Act include the Tenth Grade Counseling Program, the Reader Service for Blind Teacher Program, and the Home to School Transportation Program. (A full list of the educational programs identified in section 12.40 of the 1999 State Budget Act is provided in the footnote below.)"

The same is true for the other programs identified in Education Code section 44504, subdivision (b), all of which are voluntary: i.e., the Administrator Training and Evaluation Program, the Instructional Time and Staff Development Reform Program, and the School Development Plans Program.

Accordingly, the Commission finds that the 1999 amendment to Education Code sections 44662, subdivision (d), and 44664, subdivision (b), does not impose a mandate on school districts to receive and review the results of the Peer Assistance and Review Program as part of the Stull Act

⁴² Section 12.40 of the 1999 State Budget Act identifies the following programs: Item 6 1 10-108-000 1 Tenth Grade Counseling (Ed. Code, § 4843 1.7); Item 6 1 10-11 0-0001 Reader Service for Blind Teachers (Ed. Code, §§ 45371, 44925); Item 6110-1 1 1-0001 – Home to School Transportation and Small District Transportation (Ed. Code, § 41850, 42290); Item 611 O-1 16-0001 - School Improvement Program (Ed. Code, § 52000 et seq.); Item 611 O-1 18-0001 - State Vocational Education (in lieu of funds otherwise appropriated pursuant to Business and Professions Code section 19632); Item 6 1 IO- 119-0001 Educational Services for Foster Youth (Ed. Code, § 42920 et seq.); Item 6 1 10- 120-000 1 – Pupil Dropout Prevention Programs (Ed. Code, §§ 52890, 52900, 54720, 58550); Item 6110-122-0001 - Specialized Secondary Programs (Ed. Code, § 58800 et seq.); Item 611 O-124-0001 Gifted and Talented Pupil Program (Ed. Code, § 52200 et seq.); Item 611 O-126-0001 - Miller-Unruh Basic Reading Act of 1965 (Ed. Code, § 54100 et seq.); Item 611 O-127-0001 – Opportunity Classes and Programs (Ed. Code, § 48643 et seq.); Item 6110-128-0001 - Economic Impact Aid (Ed. Code, § 54020, 5403 1, 54033, 54040); Item 61 10- 13 1-0001 American Indian Early Childhood Education Program (Ed. Code, § 52060 et seq.); Item 6110-1 46-0001 - Demonstration Programs in Intensive Instruction (Ed. Code, § 5 8600 et seq.); Item 6 1 10- 15 1-000 1 — California Indian Education Centers (Ed. Code, § 33380); Item 6110-163-0001 The Early Intervention for School Success Program (Ed. Code, § 54685 et seq.); Item 6110-167-0001 – Agricultural Vocational Education Incentive Program (Ed. Code, § 52460 et seq.); Item 6 11 O-1 80-0001 grant money pursuant to the federal Technology Literacy Challenge Grant Program; Item 6 11 0-18 1-000 1 Educational Technology Programs (Ed. Code, § 5 1870 et seq.); Item 6 1 10- 193-000 1 - Administrator Training and Evaluation Program, School Development Plans and Resource Consortia, Bilingual Teacher Training Program; Item 6 1 10- 197-0001 - Instructional Support-Improving School Effectiveness - Intersegmental Programs; Item 6110-203-0001 Nutrition Programs (Ed. Code, §§ 41311, 49536, 49501, 49550, 49552, 49559); Item 6110-204-000 1 – 7" and 8th Grad Math Academies; and Item 6 11 O-209-000 1 – Teacher Dismissal Apportionments (Ed. Code, § 44944).

evaluation and, thus, these sections are not subject to article XIII B, section 6 of the California Constitution.

The remaining requirements imposed by the test claim legislation constitute a state-mandated program only for those certificated employees that perform the duties mandated by state and federal law.

The remaining test claim legislation requires school districts, in their evaluation of certificated personnel, to perform the following activities:

- assess and evaluate the performance of non-instructional certificated personnel (former Ed. Code, §§ 13485, 13487, as amended by Stats. 1975, ch. 1216; Ed. Code, § 44663, as amended by Stats. 1986, ch. 393);
- establish standards of expected student achievement at each grade level in each area of study to be included in a district's evaluation and assessment guidelines (former Ed. Code, § 13487, as repealed and reenacted by Stats. 1975, ch, 1216);
- evaluate and assess the performance of instructional certificated employees as it reasonably relates to the instructional techniques and strategies used by certificated employees, the certificated employee's adherence to curricular objectives, and the progress of pupils towards the state adopted academic content standards (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498 and Stats. 1999, ch. 4); and
- assess and evaluate certificated personnel that receive an unsatisfactory evaluation once each year until the employee achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498).

Pursuant to the Supreme Court's decision in the *Department* of *Finance* case, the Commission finds that the evaluation and assessment activities required by the test claim legislation constitute state-mandated activities only for those certificated employees that perform the duties mandated by state or federal law. The activities associated with evaluating and assessing certificated personnel employed in local, discretionary educational programs do not constitute statemandated activities and, thus, are not subject to article XIII B, section 6 of the California Constitution.

In Department of Finance, supra, the Court found, on page 73 1 of the decision, that:

[W]e reject claimants' assertion that they have been legally compelled to incur notice and agenda costs, and hence are entitled to reimbursement from the state, based merely upon the circumstance that notice and agenda provisions are mandatory elements of education-related program in which claimants have participated, without regard to whether claimant's participation in the underlying program is voluntary or compelled. [Emphasis added.]

In the present case, the California Constitution gives the Legislature plenary authority over education by requiring the Legislature to encourage by all suitable means the promotion of education and to provide for a system of common schools.⁴³ A system of common schools

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⁴³ California Constitution, article IX, sections 1, 5; *Hayes* v. *Commission on state Mandates* (1992) 11 Cal. App.4th 1564, 1579, fn. 5.

means one system, which prescribes the courses of study and educational progression from grade to grade. ⁴⁴ Schools are required to meet the minimum standards and guidelines regarding course instruction and educational progression established by the Legislature. ⁴⁵

Given this background, the Legislature has historically mandated specified educational programs that school districts are required to follow. For example, Education Code section 48200 provides that each person between the ages of six and 18 years is subject to compulsory full-time education. School districts are required to adopt a course of study for grades 1 to 6 that shall include English, Mathematics, Social Sciences, Science, Visual and Performing Arts, Health, and Physical Education. 46 School districts are required to offer the following courses for grades 7 to 12: English, Social Sciences, Foreign Language, Physical Education, Science, Mathematics, Visual and Performing Arts, Career Technical Education; and Driver Education. 47 Education Code section 5 1225.3 describes the state-mandated courses of instruction required for high school graduation. In addition, in the appropriate elementary and secondary grade levels, the required course of study shall include instruction in personal and public safety and accident prevention (Ed. Code, § 5 1202), instruction about the nature and effects of alcohol, narcotics, and restricted dangerous drugs (Ed. Code, § 5 1203), and, in grades 7 and 8, instruction on parenting skills and education (Ed. Code, 5 1220.5). Finally, Education Code section 44805 states that "every teacher in the public schools shall enforce the course of study . . . prescribed for schools."

In addition, federal law requires school districts to provide a free and appropriate education to all handicapped children.⁴⁸

Thus, school districts are required to employ certificated personnel to fulfill the requirements of the state and federal mandated educational programs. Accordingly, pursuant to the *Department of Finance* case, school districts are mandated by the state to perform the test claim requirements to evaluate and assess the certificated personnel perfonning the mandated functions.

Moreover, the Commission finds that the test claim requirements to evaluate and assess the certificated personnel performing mandated functions constitutes a program subject to article XIII B, section 6 of the California Constitution. The California Supreme Court, in the case of County of Los Angeles v. State of California⁴⁹, defined the word "program" within the meaning of article XIII B, section 6 as a program that carries out the governmental function of providing a

⁴⁴ Wilson v. State Board of Education (1999) 75 Cal.App.4th 1123, 1135-I 136. In Wilson, the court determined that charter schools fall within the system of common schools because their educational programs are required to meet the same state standards, including minimum duration of instruction applicable to all public schools, measurement of student progress by the same assessments required of all public school students, and students are taught by teachers meeting the same minimum requirements as all other public school teachers. (ICE. at p. 1138.)

⁴⁵ Burton v. Pasadena City Board of Education (1977) 71 Cal.App.3d 52, 58.

⁴⁶ Education Code section 5 1210.

⁴⁷ Education Code section 5 1220.

⁴⁸ Hayes, supra, 11 Cal. App. 4th at page 1592.

⁴⁹ County of Los Angeles, supra, 43 Cal.3d at page 56.

service to the public, or laws which, to implement a state policy, impose unique requirements on local governments and do not apply generally to all residents and entities in the state, Only one of these findings is necessary to trigger the applicability of article XIII B, section 6.50

Legislative intent of the test claim legislation is provided in Education Code section 44660 as follows:

It is the intent of the Legislature that governing boards establish a uniform system of evaluation and assessment of the performance of all certificated personnel within each school district of the state, including schools conducted or maintained by county superintendents of education. The system shall involve the development and adoption by each school district of objective evaluation and assessment guidelines, which may, at the discretion of the governing board, be uniform throughout the district, or for compelling reasons, be individually developed for territories or schools within the district, provided that all certificated personnel of the district shall be subject to a system of evaluation and assessment adopted pursuant to this article?

The Commission finds that objectively evaluating the performance of certificated personnel performing mandated functions within a school district carries out the governmental function of providing a service to the public. Public education is a governmental function within the meaning of article XIII B, section 6. The California Supreme Court in *Lucia Mar* stated that "the contributions called for [in the test claim legislation] are used to fund a 'program' . . . for the education of handicapped children is clearly a governmental function providing a service to the public." Additionally, the court in the *Long Beach Unified School District* case held that "although numerous private schools exist, education in our society is considered to be a peculiarly governmental function." In addition, the test claim legislation imposes unique requirements on school districts.

However, the activities associated with evaluating and assessing certificated personnel employed in local, discretionary educational programs do not constitute state-mandated activities and, thus, are not subject to article XIII B, section 6 of the California Constitution. Pursuant to existing law, school districts are encouraged to develop their own local programs that best fit the needs and interests of the pupils. Unless the Legislature expressly imposes statutory requirements on school districts, school districts have discretionary control with their educational programs."

 $^{^{50}}$  Carmel Valley Fire Protection Dist., supra, 190 Cal.App.3d at page 537.

⁵¹ As originally enacted, former Education Code section 13485 stated the legislative intent as follows: "It is the intent of the Legislature to establish a uniform system of evaluation and assessment of the performance of certificated personnel within each school district of the state. The system shall involve the development and adoption by each school district of objective evaluation and assessment guidelines."

⁵² Lucia Mar, supra, 44 Cal.3d at page 835.

⁵³ Long Beach Unified School District, supra, 225 Cal. App.3d at page 172.

⁵⁴ California Constitution, article IX, section 14; Education Code sections 35 160, 35 160.1, 51002,

For example, the Supreme *Court* in the *Department of Finance* case found that eight of the nine educational programs were voluntary and not mandated by the state. These include the following programs: School Improvement Program (Ed. Code, § 52010 et seq.); American Indian Early Childhood Education Program (Ed. Code, § 52060 et seq.); School-Based Coordinated Categorical Program (Ed. Code, § 52850 et seq.); Compensatory Education Programs (Ed. Code, § 54420 et seq.); Migrant Education Program (Ed. Code, § 54440 et seq.); Motivation and Maintenance Program (Ed. Code, § 54720 et seq.); Parental Involvement Program (Ed. Code, § 11500 et seq.); and Federal Indian Education Program (25 U.S.C, § 2604).⁵⁵

The Commission finds that school districts are free to discontinue their participation in these underlying voluntary programs and free to discontinue employing certificated personnel funded by these programs. Accordingly, the test claim requirements to evaluate and assess certificated personnel funded or employed in local discretionary programs are not mandated by the state and not subject to article XIII B, section 6 of the California Constitution?

Since the parties did not file comments in response to the request for additional briefing on this issue, the determination of the certificated employees performing mandated functions for which schools districts are eligible to receive reimbursement will be addressed during the parameters and guidelines phase.

## Issue 2: Does the test claim legislation impose a new program or higher level of service within the meaning of article XIII B, section 6 of the California Constitution?

The California Supreme Court and the courts of appeal have held that article XIII B, section 6 was not intended to entitle local agencies and school districts for all costs resulting from legislative enactments, but only those costs mandated by a new program or higher level of service imposed on them by the state. ⁵⁷ Generally, to detennine if the program is new or imposes a higher level of service, the analysis must compare the test claim legislation with the legal requirements in effect immediately before the enactment of the test claim legislation?

As indicated above, the Stull Act was enacted in 197 1. The test claim legislation, enacted from 1975 to 1999, amended the Stull Act. The issue is whether the amendments constitute a new program or higher level of service within the meaning of article XIII B, section 6 of the California Constitution.

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⁵⁵ Department of Finance, supra, 30 Cal.4th at page 745.

⁵⁶ The court did not conclude whether school districts were legally compelled to participate in the Bilingual-Bicultural Education program (Ed. Code, § 52160 et seq.) since the case was denied on other grounds. (*Department of Finance, supra, 30* Cal.4th at p. 746-747.)

⁵⁷ Lucia Mar Unified School Dist., supra, 44 Cal.3d at page 834; City of San Jose v. State of California (1996) 45 Cal.App.4th 1802, 18 16.

⁵⁸ Lucia Mar Unified School Dist., supra, 44 Cal.3d at page 835.

Develop job responsibilities for certificated non-instructional personnel, and assess and evaluate the performance of certificated non-instructional personnel (Former Ed. Code, §§ 13485, 13487, as amended by Stats, 1975, ch. 1216; Ed. Code, § 44663, as amended by Stats, 1986, ch. 393).

The claimant is requesting reimbursement for the following activities relating to certificated non-instructional employees:

- Establish and define job responsibilities for certificated non-instructional personnel, including, but not limited to, supervisory and administrative personnel.
- Evaluate and assess the performance of certificated non-instructional personnel as it reasonably relates to the fulfillment of the established job responsibilities.
- Prepare and draft a written evaluation of the certificated non-instructional employee, The evaluation shall include recommendations, if necessary, as to areas of improvement.
- Receive and review from a certificated non-instructional employee written responses regarding the evaluation.
- Prepare and hold a meeting between the certificated non-instructional employee and the evaluator to discuss the evaluation and assessment.⁵⁹

As originally enacted in 197 1, the Stull Act stated in former Education Code section 13485 the following:

It is the intent of the Legislature to establish a uniform system of evaluation and assessment of the performance of certificated personnel within each school district of the state. The system shall involve the development and adoption by each school district of objective evaluation and assessment guidelines.

Former Education Code section 13486 stated the following:

In the development and adoption of these guidelines and procedures, the governing board shall avail itself of the advice of the certificated instructional personnel in the district's organization of certificated personnel.

Former Education Code section 13487 required school districts to develop and adopt specific evaluation and assessment guidelines for certificated personnel. Former section 13487 stated the following:

The governing board of each school district shall develop and adopt specific evaluation and assessment guidelines which shall include but shall not necessarily be limited in content to the following elements:

- (a) The establishment of standards of expected student progress in each area of study and of techniques for the assessment of that progress.
- (b) Assessment of certificated personnel as it relates to the established standards.
- (c) Assessment of other duties normally required to be performed by certificated employees as an adjunct to their regular assignments.

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⁵⁹ Exhibit A (Test Claim, page 6) to Item 9 of the May 27, 2004 Commission Hearing.

(d) The establishment of procedures and techniques for ascertaining that the certificated employee is maintaining proper control and is preserving a suitable learning environment.

Former Education Code section 13488 required that the evaluation and assessment be reduced to writing, that an opportunity to respond be given to the certificated employee, and that a meeting be held between the certificated employee and the evaluator to discuss the evaluation. Former section 13488 stated the following:

Evaluation and assessment made pursuant to this article shall be reduced to writing and a copy thereof shall be transmitted to the certificated employee not later than 60 days before the end of each school year in which the evaluation takes place. The certificated employee shall have the right to initiate a written reaction or response to the evaluation. Such response shall become a permanent attachment to the employee's personnel file. Before the end of the school year, a meeting shall be held between the certificated personnel and the evaluator to discuss the evaluation.

And, former Education Code section 13489 required that the evaluation and assessment be performed on a continuing basis, and that the evaluation include necessary recommendations as to areas of improvement. Former Education Code section 13489, as enacted in 1971, stated the following:

Evaluation and assessment of the performance of each certificated employee shall be made on a continuing basis, at least once each school year for probationary personnel, and at least every other year for personnel with permanent status. The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. In the event an employee is not performing his duties in a satisfactory manner according to the standards prescribed by the governing board, the employing authority shall notify the employee in writing of such fact and describe such unsatisfactory performance. The employing authority shall thereafter confer with the employee malting specific recommendations as to areas of improvement in the employee's performance and endeavor to assist him in such performance.

In addition, section 42 of the 1971 statute provided a specific exemption for certificated employees of community colleges if a related bill was enacted. Section 42 stated the following:

Article 5 (commencing with Section 1340 1) and Article 5.5 (commencing with Section 13485) of Chapter 2 of Division 10 of the Education Code shall not apply to certificated employees in community colleges if Senate Bill No. 696 or Assembly Bill No. 3032 is enacted at the 1971 Regular Session of the Legislature.

According to the history, Senate Bill 696 was enacted as Statutes 1971, chapter 1654. **Thus**, certificated employees of community colleges were not required to comply with the Stull Act.

In 1972, former Education Code section 13485 was amended to specifically exclude from the requirements of the Stull Act certificated personnel employed on an hourly basis in adult education classes.⁶⁰

In 1973, former Education Code section 13489 was amended to exclude hourly and temporary certificated employees and substitute teachers, at the discretion of the governing board, from the requirement to evaluate and assess on a continuing basis.⁶¹

**Thus**, under prior law, school districts were required to perform the following activities as they related to "certificated personnel:"

- Develop and adopt specific evaluation and assessment guidelines for the performance of "certificated personnel."
- Evaluate and assess "certificated personnel" as it relates to the established standards.
- Prepare and draft a written evaluation of the "certificated employee." The evaluation shall include recommendations, if necessary, as to areas of improvement.
- Receive and review from a "certificated employee" written responses regarding the evaluation.
- Prepare and hold a meeting between the "certificated employee" and the evaluator to discuss the evaluation and assessment.

The test claim legislation, in 1975 (Stats. 1975, ch. 1216), amended the Stull Act by adding language relating to certificated "non-instructional" employees. As amended, former Education Code section 13485 stated in relevant part the following (with the amended language underlined):

It is the intent of the Legislature that governing boards establish a uniform system of evaluation and assessment of the performance of <u>all</u> certificated personnel within each school district of the state . . . .

Former Education Code section 13487 was also repealed and reenacted by Statutes 1975, chapter 12 16, as follows (amendments relevant to this issue are underlined):

- (a) The governing board of each school district shall establish standards of expected student achievement at each grade level in each area of study.
- (b) The governing board of each school district shall evaluate and assess certificated employee competency as it reasonably relates to (1) the progress of students toward the established standards, (2) the performance of those noninstructional duties and responsibilities, including supervisory and advisory duties, as may be prescribed by the board, and (3) the establishment and maintenance of a suitable learning environment within the scope of the employee's responsibilities.

⁶⁰ Statutes 1972, chapter 535.

⁶¹ Statutes 1972, chapter 1973.

(c) The governing board of each school district shall establish and define job responsibilities for those certificated noninstructional personnel, including, but not limited to, supervisory and administrative personnel, whose responsibilities cannot be evaluated appropriately under the provisions of subdivision (b), and shall evaluate and assess the competency of such noninstructional employees as it reasonably relates to the fulfillment of those responsibilities. . . .

The 1975 test claim legislation did not amend the requirements in fonner Education Code sections 13488 or 13489 to prepare written evaluations of certificated employees, receive responses to those evaluations, and conduct a meeting with the certificated employee to discuss the evaluation.

Additionally, in 1986, the test claim legislation (Stats. 1986, ch. 393) amended Education Code section 44663 (which derived from former Ed. Code, § 13488) by adding subdivision (b) to provide that the evaluation and assessment of certificated non-instructional employees shall be reduced to writing before June 30 of the year that the evaluation is made, that an opportunity to respond be given to the certificated non-instructional employee, and that a meeting be held between the certificated non-instructional employee and the evaluator to discuss the evaluation before July 30. Education Code section 44663, subdivision (b), as added by the test claim legislation, states the following:

In the case of a certificated noninstructional employee, who is employed on a 12-month basis, the evaluation and assessment made pursuant to this article shall be reduced to writing and a copy thereof shall be transmitted to the certificated employee no later than June 30 of the year in which the evaluation and assessment is made. A certificated noninstructional employee, who is employed on a 12-month basis shall have the right to initiate a written reaction or response to the evaluation. This response shall become a permanent attachment to the employee's personnel file. Before July 30 of the year in which the evaluation and assessment take place, a meeting shall be held between the certificated employee and the evaluator to discuss the evaluation and assessment.

The claimant contends that the Stull Act, as originally enacted in 197 1, required the assessment and evaluation of teachers, or certificated instructional employees, only. The claimant argues that when the Stull Act was amended in 1975 and 1986, it added the requirement for schools districts to develop job responsibilities to assess and evaluate the performance of non-instructional personnel. The claimant contends that under the rules of statutory construction, an amendment indicates the legislative intent to change the law. The claimant contends that this amendment imposed additional activities on school districts to develop job responsibilities and evaluate certificated non-instructional employees, which constitute a higher level of service?

The Department of Finance argues that school districts have always had the requirement to assess and evaluate non-instructional personnel because the original legislation enacted in 197 1 refers to all certificated personnel. The Department of Finance contends that the subsequent

⁶² Exhibit C to Item 9 of the May 27, 2004 Commission Hearing.

amendments that specifically list certificated non-instructional personnel, were clarifying edits and not new requirements.⁶³

The Stull Act was an existing program when the test claim legislation was enacted. Thus, the issue is whether the 1975 and 1986 amendments to the Stull Act mandated an increased, or higher level of service to develop job responsibilities and to evaluate and ass&s certificated non-instructional employees. In 1987, the California Supreme Court in County of Los Angeles v. State **of** California expressly stated that the term "higher level of service" must be read in conjunction with the phrase "new program." Both are directed at state-mandated increases in the services provided by local agencies?"

In 1990, the Second District **Court** of Appeal decided the *Long Beach Unified School District* case, which challenged a test claim filed with the Board of Control on executive orders issued by the Department of Education to alleviate racial and ethnic segregation in schools. ⁶⁵ The court determined that the executive orders did not constitute a "new program" since schools had an existing constitutional obligation to alleviate racial segregation? However, the court found that the executive orders constituted a "higher level of service" because the requirements imposed by the state went beyond constitutional and case law requirements. The court stated in relevant part the following:

The phrase "higher level of service" is not defined in article XIII B or in the ballot materials. [Citation omitted.] A mere increase in the cost of providing a service which is the result of a requirement mandated by the state is not tantamount to a higher level of service. [Citation omitted.] However, a review of the Executive Order and guidelines shows that a higher level of service is mandated because the requirements go beyond constitutional and case law requirements. . , .While these steps fit within the "reasonably feasible" description of [case law], the point is that these steps are no longer merely being suggested as options which the local school district may wish to consider but are *required acts*. *These requirements constitute a higher level of service*. We are supported in our conclusion by the report of the Board to the Legislature regarding its decision that the Claim is reimbursable: "Only those costs that are above and beyond the regular level of service for like pupils in the district are reimbursable." 67, 68

⁶³ Exhibit B to Item 9 of the May 27, 2004 Commission Hearing.

⁶⁴ County of Los Angeles, supra, 43 Cal.3d at page 56.

⁶⁵ Long Beach Unified School District, supra, 225 Cal. App. 4th 155.

⁶⁶ *Id.* at page 173.

⁶⁷ Ibid., emphasis added.

⁶⁸ See also, County of Los Angeles v. Commission on State Mandates (2003) 110 Cal. App. 4th 1176, 1193-1194, where the Second District Court of Appeal followed the earlier rulings and held that in the case of an existing program, reimbursement is required only when the state is divesting itself of its responsibility to provide fiscal support for a program, or is forcing a new program on a locality for which it is ill-equipped to allocate funding.

Thus, in order for the 1975 and 1986 amendments to the Stull Act, relating to certificated non-instructional personnel, to impose a new program or higher level of service, the Commission must find that the state is imposing new required acts or activities on school districts beyond those already required by law.

For the reasons described below, the Commission finds that school districts have been required to develop job responsibilities for certificated non-instructional employees, evaluate and assess certificated non-instructional employees, draft written evaluations of certificated non-instructional employees, receive and review written responses to the evaluation from certificated non-instructional employees, and conduct meetings regarding the evaluation with certificated non-instructional employees under the Stull Act since 197 1, before the enactment of the test claim legislation.

Claimant argues that the statutory amendments to the Stull Act, by themselves, reflect the legislative intent to change the law. However, the intent to change the law may not always be presumed by an amendment, as suggested by the claimant. The court has recognized that changes in statutory language can be intended to clarify the law, rather than change it,

We assume the Legislature amends a statute for a purpose, but that purpose need not necessarily be to change the law. [Citation.] Our consideration of the suwounding circumstances can indicate that the Legislature made . . . changes in statutory language in an effort only to clarify a statute's true meaning. [Citations omitted.]"

Thus, to determine whether the Stull Act, as originally enacted in 197 1, applied to all certificated employees of a school district, instructional and non-instructional employees alike, the Commission must apply the rules of statutory construction. Under the rules of statutory construction, the first step is to look at the statute's words and give them their plain and ordinary meaning. Where the words of the statute are not ambiguous, they must be applied as written and may not be altered in any way. Moreover, the intent must be gathered with reference to the whole system of law of which it is a part so that all may be harmonized and have effect.⁷⁰

As indicated by the plain language of former Education Code sections 13485,13487, 13488, and 13489, school districts were required under prior law to develop evaluation and assessment guidelines for the evaluation of "certificated" employees, evaluate and assess "certificated" employees on a continuing basis, draft written evaluations of "certificated" employees, receive and review written response to the evaluation from "certificated" employees, and conduct meetings regarding the evaluation with "certificated" employees. The plain language of these statutes does not distinguish between instructional employees (teachers) and non-instructional employees (principals, administrators), or specifically exclude certificated non-instructional employees. When read in context with the whole system of law of which these statutes are a part, the requirements of the Stull Act originally applied to *all* certificated employees under prior law.

As enacted, the Stull Act was placed in Chapter 2 of Division 10 of the 1971 Education Code, a chapter addressing "Certificated Employees." Certificated employees are those employees

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⁶⁹ Western Security Bank v. Superior Court (1997) 15 Cal.4th 232, 243.

⁷⁰ People v. *Thomas* (1992) 4 Cal.4th 206, 210.

directly involved in the educational process and include both instructional and non-instructional employees such as teachers, administrators, supervisors, and principals." Certificated employees must be properly credentialed for the specific position they hold." A "certificated person" was defined in former Education Code section 12908 as "a person who holds one or more documents such as a certificate, a credential, or a life diploma, which singly or in combination license the holder to engage in the school service designated in the document or documents." The definition of "certificated person" governs the construction of Division 10 of the former Education Code and is not limited to instructional employees.⁷³

Thus, the plain language of former Education Code sections 13485,13487, 13488, and 13489 read within the context of Chapter 2 of Division 10 of the 1971 Education Code, a division that governs both instructional and non-instructional certificated employees, required school districts to develop evaluation and assessment guidelines and to evaluate both instructional and non-instructional certificated employees based on the guidelines on a continuing basis.

In addition, former Education Code section 13486, as enacted in 1971, expressly required school districts to avail themselves "of the advice of the *certificated instructional personnel* in the district's organization of certificated personnel" when developing and adopting the evaluation guidelines. (Emphasis added.) Fonner Education Code sections 13485,13487, 13488, and 13489, enacted at the same time, did not limit the evaluation and assessment requirements to "certificated instructional personnel" only. Rather, "certificated employees" were required to be evaluated. Thus, had the Legislature intended to require school districts to evaluate and assess only teachers, as argued by claimant, they would have limited the requirements of former Education Code sections 13485,13487, 13488, 13489 to "certificated instructional personnel." Under the rules of statutory construction, the Commission is prohibited from altering the plain language of a statute, or writing into a statute, by implication, express requirements that the Legislature itself has not seen fit to place in the statute.⁷⁴

Moreover, under prior law, the Legislature expressly excluded certain types of certificated employees from the requirements of the Stull Act, and never expressly excluded non-instructional employees. When the Stull Act was originally enacted in 1971, the Legislature excluded employees of community colleges from the requirements. In 1972, the Legislature revisited the Stull Act and expressly excluded certificated personnel employed on an hourly basis in adult education classes. In 1973, school districts were authorized to exclude hourly and temporary certificated employees, and substitute teachers from the evaluation requirement. Under the rules of statutory construction, where exceptions to a general rule are specified by

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⁷¹ Former Education Code section 13 187 et seq. of the 1971 Education Code.

⁷² Former Education Code section 1325 1 et seq. of the 1971 Education Code.

⁷³ Former Education Code 12901 of the 1971 Education Code.

⁷⁴ Whitcomb v. California Employment Commission (1944) 24 Cal.2d 753, 757; In re Rudy L. (1994) 29 Cal.App.4th 1007, 1011.

⁷⁵ Section 42 of Statutes 1971, chapter 361.

⁷⁶ Statutes 1972, chapter 535.

⁷⁷ Statutes 1973, chapter 220.

statute, other exceptions are not to be implied or presumed, absent a discernible and contrary legislative intent. Thus, it cannot be implied from the plain language of the legislation that the Legislature intended to exclude certificated non-instructional employees from the requirements of the Stull Act.

The conclusion that the Stull Act applied to non-instructional employees under prior law is further supported by case law. In 1977, the First District Court of Appeal considered *Grant* v. *Adams*. The *Grant* case involved a school district employee who was a certified teacher with credentials as an administrator who had been serving as a principal (a non-instructional employee) of an elementary school from 1973 through 1974. In May 1974, the employee was reassigned and demoted to a teaching position for the 1974-1975 school year. The employee made the argument that the Stull Act, when coupled with other statutory provisions, created a property interest in his position as a principal and required that an evaluation be conducted before termination of an administrative assignment. The court disagreed with the employee's argument, holding that the Stull Act evaluation was not a precondition to reassignment or dismissal.* When analyzing the issue, the court made the following findings:

In 197 1, the Legislature passed the so-called "Stull Act," Education Code sections 13485-13490. Among other things the Stull Act required that all school districts establish evaluation procedures for certificated personnel. (Ed. Code, § 13485.) The state board of education developed guidelines for evaluation of administrators and teachers pursuant to the Stull Act. Respondents [school district] adopted those guidelines without relevant change in June 1972. The guidelines called for evaluation of personnel on permanent status at least once every two years. Appellant was given no evaluation pursuant to the guidelines. (Emphasis added.)⁸²

In 1979, the California Supreme Court decided *Miller v. Chico Unified School District Board of Education*, a case with similar facts. ⁸³ In the *Miller* case, the employee was a principal of a junior high school from 1958 until 1976, when he was reassigned to a teaching position. In 1973, the school board adopted procedures to formally evaluate administrators pursuant to the Stull Act. ⁸⁴ The employee received a Stull Act evaluation in 1973, 1974, and 1975. ⁸⁵ In 1976, the school board requested the employee's cooperation in his fourth annual Stull evaluation report, but the employee refused on advice of counsel. ⁸⁶ The employee sought reinstatement to

81 *Id.* at pages 134-135.

⁷⁸ *Peoplev.Galambos* (2002) 104 Cal.App.4th 1147.

⁷⁹ Grant v. Adams (1977) 69 Cal. App.3d 127.

⁸⁰ *Id.* at page 130.

⁸² Id. at plage, footnote 3.

 $^{^{83}\,}Miller\,v.$  Chico Unified School District Board of Education (1979) 24 Cal.3d 703.

⁸⁴ *Id.* **pt**age 707.

⁸⁵ Id. **apt**age**3**08-710, 717.

⁸⁶ Id. at page 709.

his position as a principal on the ground that the school board failed to comply with the Stull Act.⁸⁷ The court denied the employee's request and made the following findings:

The record indicates, however, that the school board substantially complied with the Stull Act's mandate that the board fix performance guidelines for its certificated personnel, evaluate plaintiff in light of such guidelines, inform plaintiff of the results of any evaluation, and suggest to plaintiff ways to improve his performance.

The school board's guidelines provide for annual evaluations of supervisory personnel; accordingly, the board evaluated plaintiff in 1973, 1974, and 1975. Although plaintiff received generally satisfactory evaluations in 1973 and 1974, the board's evaluation report in 1974 contains suggestions for specific areas of improvement. . . .

Plaintiff's final Stull Act evaluation in June 1975 plainly notified plaintiff "in writing" of any unsatisfactory conduct on his part, and in addition provided a forum for plaintiffs supervisors to make "specific recommendations as to areas of improvement in the employee's performance and endeavor to assist him in such performance." [Former Ed. Code, § 13489.) . . . .

The court is surely obligated to understand the purpose of . . . [the Stull Act] and to apply those sections to the relevant facts.**

Finally, the legislative history of the 1986 test claim legislation supports the conclusion that the specific language added to the Stull Act was not intended to impose new required acts on school districts. As stated above, the test claim legislation (Stats. 1986, ch. 393) amended Education Code section 44663 by adding subdivision (b) to provide that the evaluation and assessment of certificated non-instructional employees shall be reduced to writing before June 30 of the year that the evaluation is made, that an opportunity to respond be given to the certificated non-instructional employee, and that a meeting be held between the certificated non-instructional employee and the evaluator to discuss the evaluation before July 30. The legislative history of Statutes 1986, chapter 393 (Assem. Bill No. 3878) indicates that the purpose of the bill was to extend for 45 days the *current* requirement for the evaluation of certificated non-instructional employees. The analysis of Assembly Bill 3878 by the Assembly Education Committee, dated

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⁸⁷ *Id.* at page 7 16.

⁸⁸ *Id.* at pages 717-718.

⁸⁹ Letter from San Diego Unified School District to the Honorable Teresa Hughes, Chairperson of the Assembly Education Committee, on Assembly Bill 3878, April 4, 1986; Assembly Education Committee, Republican Analysis on Assembly Bill 3878, April 7, 1986; Department of Finance, Enrolled Bill Report on Assembly Bill 3878, April 21, 1986; Legislative Analyst, Analysis of Assembly Bill 3878, April 24, 1986; Assembly Education Committee, Republican Analysis on Assembly Bill 3878, April 26, 1986; Senate Committee on Education, Staff Analysis on Assembly Bill 3878, May 28, 1986; Legislative Analyst, Analysis of Assembly Bill 3878, June 18, 1986. (Exhibit I to Item 9 of the May 27, 2004 Commission Hearing.)

### April 7, 1986, states the following:

Current statute requires evaluations of noninstructional certificated employees on 12 month contracts to be conducted within 30 days before the last school day. This apparently is a problem for San Diego [Unified School District] because all evaluations are jammed in at the end of the school year. They feel it would make more sense to allow extra time to evaluate those on 12 month contracts and spread the process out over a longer period of time.⁹⁰

The April 24, 1986 analysis of Assembly Bill 3878 by the Legislative Analyst states the following:

Our review indicates that this bill does not mandate any new duties on school district governing boards, but simply extends the date by which evaluations of certain certificated employees must be completed."

Based on the foregoing authorities, the Commission finds that school districts were required under prior law to perform the following activities:

- Develop and adopt specific evaluation and assessment guidelines for the performance of certificated non-instructional personnel.
- Evaluate and assess certificated non-instructional personnel as it relates to the established standards.
- Prepare and draft a written evaluation of the certificated non-instructional employee. The evaluation shall include recommendations, if necessary, as to areas of improvement.
- Receive and review from a certificated non-instructional employee written responses regarding the evaluation.
- Prepare and hold a meeting between the certificated non-instructional employee and the evaluator to discuss the evaluation and assessment.

The Commission further finds that the language added to former Education Code section 13487 by the 1975 test claim legislation to "establish and define job responsibilities" for certificated non-instructional personnel falls within the preexisting duty to develop and adopt objective evaluation and assessment guidelines for all certificated employees, does not mandate any new required acts, and, thus, does not constitute a new program or higher level of service,""

Accordingly, the Commission finds that the 1975 and 1986 amendments to former Education Code sections 13485 and 13487 and Education Code section 44663 as they relate to certificated non-instructional employees do not constitute a new program or higher level of service.⁹³

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⁹⁰ Id. at page 301.

⁹¹ *Id.* at page 306.

⁹² Long Bench Unified School District, supra, 225 Cal. App. 4th at page 173.

⁹³ It is noted that the analysis by the Legislative Analyst on Senate Bill 777, which was enacted as Statutes 1975, chapter 1216, concludes that "there would also be undetermined increased local costs due to the addition of... non-instructional certificated employees in evaluation and

Establish standards of expected pupil achievement at each grade level in each area of study [Former Ed, Code, § 13487, as repealed and reenacted by Stats. 1975, ch. 1216).

The claimant is requesting reimbursement to establish standards of expected pupil achievement at each grade level in each area of study.

Former Education Code section 13487, as originally enacted in 197 1, required school districts to develop and adopt specific evaluation and assessment guidelines for certificated personnel. Former section 13487 stated in relevant part the following:

The governing board of each school district shall develop and adopt specific evaluation and assessment guidelines which shall include but shall not necessarily be limited in content to the following elements:

(a) The establishment of standards of expected student progress in each area of study and of techniques for the assessment of that progress.

The test claim legislation, in Statutes 1975, chapter 1216, repealed and reenacted former Education Code section 13487, As reenacted, the statute provided the following (amendments relevant to this issue are reflected with strikeout and underline):

(a) The governing board of each school district shall establish standards of expected student progress achievement at each grade level in each area of study.

The claimant contends that the 1975 test claim legislation imposed a new program or higher level of service on school districts to rewrite standards for employee assessment to reflect expected student "achievement" (as opposed expected student "progress") and to expand the standards to reflect expected student achievement at each "grade level." The claimant further states the following:

Prior law only required that the standards of expected student achievement be established to show student progress. Under prior law, these standards may have tracked student progress over time. For example, a school district may have established reading standards for pupils upon graduating from eighth grade. Under the test claim legislation, school districts no longer have the ability to determine over what period standards of expected student achievement will be

assessment requirements." (See, Exhibit I, pp. 292-294.) The courts have determined, however, that legislative findings are not relevant to the issue of whether a reimbursable statemandated program exists:

[T]he statutory scheme [in Government Code section 17500 et seq.] contemplates that the Commission, as a quasi-judicial body, has the sole and exclusive authority to adjudicate whether a state mandate exists. Thus, any legislative findings are irrelevant to the issue of whether a state mandate exists . . . . " (City of San Jose, supra, 45 Cal.App.4th at pp. 1817-1818, quoting County of Los Angeles v. Commission on State Mandates (1995) 32 Cal. App.4th 805, 819, and Kinlaw v. State of California, supra, 54 Cal.3d at p. 333.)

⁹⁴ Exhibit A (Test Claim, page 4) to Item 9 of the May 27, 2004 Commission Hearing.

The Department of Finance contends that the 1975 amendment to former Education Code section 13487 does not constitute a new program or higher level of service. The Department states the following:

Finance notes that in practice, school district standards required by Chapter 36 1/7 1 would have had to have been differentiated by grade in order to provide a measure of "expected student progress." Finance also notes that changing the term "expected student progress" to the term "expected student achievement" is a wording change that would not require additional work on the part of school districts. These changes did not require additional work on the part of school districts, and therefore, are not reimbursable. ^{96,97}

In order for the 1975 reenactment of former Education Code section 13487 to constitute a new program or higher level of service, the Commission must find that the state is imposing new required acts or activities on school districts beyond those already required by law." For the reasons below, the Commission finds that the 1975 reenactment of former Education Code section 13487 does not constitute a new program or higher level of service.

On its face, the activities imposed by the 1975 reenactment of former Education Code section 13487 do not appear different than the activities required by the original 1971 version of former Education Code section 13487. Both versions require that standards for evaluation be established so that certificated personnel are evaluated based on student progress. As originally enacted in 197 1, "[t]he governing board of each school district shall develop and adopt specific evaluation and assessment guidelines which shall include . . . the establishment of standards of expected student progress in each area of study . . . [and the] . . . assessment of certificated personnel competence as it relates to the established standards." (Emphasis added.) As reenacted in 1975, "[t]he governing board of each school district shall establish standards of expected student achievement at each grade level in each area of study . . . and evaluate and assess certificated employee competency as it reasonably relates to . . . the progress of students toward the established standards." (Emphasis added.)

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⁹⁵ Exhibit C, page 2, to Item 9 of the May 27, 2004 Commission Hearing.

⁹⁶ Exhibit B, page 1, to Item 9 of the May 27, 2004 Commission Hearing.

⁹⁷ The Department of Finance's factual assertion is not supported by "documentary evidence . . . authenticated by declarations under penalty of perjury signed by persons who are authorized and competent to do so," as required by the Commission's regulations. (Cal. Code Regs., tit. 2, § 1183 .02, subd. (c)(l).)

⁹⁸ County of Los Angeles, supra, 43 Cal.3d at page 56; Long Beach Unified School Dist., supra, 225 Cal.App.4th at page 173; and County of Los Angeles, supra, 110 Cal.App.4th at pages 1193-1194.

In addition, the legislative history of the test claim statute, Statutes 1975, chapter 1216 (Sen. Bill No. 777), does not reveal an intention by the Legislature to impose new required acts. Legislative history simply indicates that the language was "modified.""

Moreover, claimant's argument, that the test claim statute imposes a higher level of service because, under prior law, school districts "may" have only tracked student progress over time (for example, by establishing "reading standards for pupils upon graduating from eighth grade"), is not persuasive. Under the claimant's interpretation, the performance of a first grade teacher could be evaluated and assessed based on reading standards for eighth grade students; students that the teacher did *not* teach. The Stull Act, as originally enacted, required the school district to evaluate and assess the performance of all certificated employees based on the progress of their pupils. In addition, the claimant's factual assertion is not supported by "documentary evidence ... authen ticated by declarations under penalty of perjury signed by persons who are authorized and competent to do so, " as required by the Commission's regulations. 100

Finally, assuming for the sake of argument only, that school districts were required to establish new standards of expected student achievement due to the 1975 test claim statute, that activity would have occurred outside the reimbursement period for this claim, The reimbursement period for this test claim, if approved by the Commission, begins July 1, 1998. The test claim statute was enacted in 1975, 23 years earlier than the reimbursement period. There is no requirement in the test claim statute that establishing the standards is an ongoing activity.

Therefore, based on the evidence in the record, the Commission finds that former Education Code section 13487 as reenacted by Statutes 1975, chapter 1216, does not impose a new program or higher level of service on school districts.

Evaluate and assess the performance of certificated instructional employees (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498 and Stats. 1999, ch. 4).

The claimant requests reimbursement to evaluate and assess the performance of certificated instructional employees as it reasonably relates to the following:

- the instructional techniques and strategies used by the certificated employee (Stats. 1983, ch. 498);
- the certificated employee's adherence to curricular objectives (Stats 1983, ch. 498); and
- the progress of pupils towards the state adopted academic content standards as measured by state adopted criterion referenced assessments (Stats. 1999, ch. 4).¹⁰¹

Senate Committee on Education, Staff Analysis on Senate Bill 777, as amended on May 7, 1975; Assembly Education Committee, Analysis of Senate Bill 777, as amended on August 12, 1975; Ways and Means Staff Analysis on Senate Bill 777, as amended on August 19, 1975; Legislative Analyst, Analysis of Senate Bill 777, as amended on August 19, 1975, dated August 22, 1975; Assembly Third Reading of Senate Bill 777, as amended on August 19, 1975. (Exhibit I to Item 9 of the May 27, 2004 Commission Hearing.)

¹⁰⁰ Cal. Code Regs., tit. 2, § 1183.02, subd. (c)(1).

Exhibit A (Test Claim, page 6) to Item 9 of the May 27, 2004 Commission Hearing.

The Department of Finance agrees that these activities constitute reimbursable state-mandated activities under article XIII B, section 6. 102

For the reasons described below, the Commission finds that evaluating and assessing the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law based on these factors constitutes a new program or higher level of service.

<u>The instructional techniques and strategies used by the employee, and the employee's adherence to curricular objectives</u>. In 1983, the test claim legislation amended Education Code section 44662, subdivision (b), to require the school district to evaluate and assess certificated employee competency as it reasonably relates to "the instructional techniques and strategies used by the employee," and "the employee's adherence to curricular objectives." (Stats. 1983, ch. 498.)

Before the 1983 test claim legislation was enacted, the Stull Act required school districts to establish an objective and uniform system of evaluation and assessment of the performance of certificated personnel. When developing these guidelines, school districts were required to receive advice from certificated instructional personnel. The court interpreted this provision to require districts to meet and confer, and engage in collective bargaining, with representatives of certificated employee organizations before adopting the evaluation guidelines?" **Thus**, certificated instructional employees were evaluated based on the guidelines developed through collective bargaining, and on the following criteria required by the state:

- the progress of students toward the established standards of expected student achievement at each grade level in each area of study; and
- the establishment and maintenance of a suitable learning environment within the scope of the employee's responsibilities. 105

Under prior law, the evaluation had to be reduced to writing and a copy of the evaluation given to the employee. An evaluation meeting had to be held between the certificated employee and the evaluator to discuss the evaluation and assessment. 106

The 1983 test claim statute still requires school districts to reduce the evaluation to writing, to transmit a copy to the employee, and to conduct a meeting with the employee to discuss the evaluation and assessment. ¹⁰⁷ These activities are not new. However, the 1983 test claim statute amended the evaluation requirements by adding two new evaluation factors: the instructional

¹⁰² Exhibit B to Item 9 of the May 27, 2004 Commission Hearing.

¹⁰³ Former Education Code sections 13485 and 13487.

¹⁰⁴ Certificated Employees Council of the Monterey Peninsula Unified School District v. Monterey Peninsula Unified School District (1974) 42 Cal.App.3d 328, 334,

¹⁰⁵ Former Education Code section 13487, subdivision (b), as amended by Statutes 1975, chapter 1216.

¹⁰⁶ Former Education Code sections 13485-13490, as originally enacted by Statutes 1971, chapter 361.

¹⁰⁷ Education Code sections 44662, 44663, 44664.

techniques and strategies used by the employee, and the employee's adherence to curricular objectives. Thus, school districts are now required by the state to evaluate and assess the competency of certificated instructional employees as it reasonably relates to:

- the progress of students toward the established standards of expected student achievement at each grade level in each area of study;
- the instructional techniques and strategies used by the employee;
- the employee's adherence to curricular objectives; and
- the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities.

School districts may have been evaluating teachers on their instructional techniques and adherence to curricular objectives before the enactment of the test claim statute based on the evaluation guidelines developed through the collective bargaining process. But, the state did not previously require the evaluation in these two areas. Government Code section 17565 states that "if a . . . school district, at its option, has been incurring costs which are subsequently mandated by the state, the state shall reimburse the . . . school district for those costs after the operative date of the mandate."

Accordingly, the Commission finds that Education Code section 44662, subdivision (b), as amended by Statutes 1983, chapter 498, imposes a new required act and, thus, a new program or higher level of service on school districts to evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives.

Reimbursement for this activity is limited to the review of the employee's instructional techniques and strategies and adherence to curricular objectives, and to include in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:

- once each year for probationary certificated employees;
- every other year for permanent certificated employees; and
- beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801)¹⁰⁸, and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree. ¹⁰⁹

¹⁰⁸ Section 7801 of title 20 of the United States Code defines "highly qualified" as a teacher that has obtained full state certification as a teacher or passed the state teacher licensing examination, and holds a license to teach, and the teacher has not had certification requirements waived on an emergency, temporary, or provisional basis.

¹⁰⁹ Education Code section 44664, subdivision (a)(3), as amended by Statutes 2003, chapter 566.

<u>State adopted academic content standards as measured by state adopted assessment tests.</u> In 1999, the test claim legislation (Stats. 1999, ch. 4) amended Education Code 44662, subdivision (b)(1), by adding the following underlined language:

The governing board of each school district shall evaluate and assess certificated employee competency as it reasonably relates to:

The progress of pupils toward the standards established pursuant to subdivision (a) [standards of expected pupil achievement at each grade level in each area of study] and, if applicable, the state adopted academic content standards as measured by state adopted criterion referenced assessments.

Before the 1999 test claim legislation, school districts were required to evaluate and assess certificated employees based on the progress of pupils. The progress of pupils was measured by standards, adopted by *local school districts*, of expected student achievement at each grade level in each area of study. The evaluation had to be reduced to writing and a copy of the evaluation given to the employee. An evaluation meeting had to be held between the certificated employee and the evaluator to discuss the evaluation and assessment."

The 1999 test claim legislation still requires school districts to evaluate and assess certificated employees based on the progress of pupils. It also still requires school districts to reduce the evaluation to writing, to transmit a copy to the employee, and to conduct a meeting with the employee to discuss the evaluation and assessment. These activities are not new.

However, the test claim legislation, beginning January 1, 2000¹¹², imposes a new requirement on school districts to evaluate the performance of certificated employees as it reasonably relates to the progress of pupils based not only on standards adopted by local school districts, but also on the academic content standards adopted by the *state*, as measured by the state adopted assessment tests.

The state academic content standards and the assessment tests that measure the academic progress of students were created in 1995 with the enactment of the California Assessment of Academic Achievement Act. The act required the State Board of Education to develop and adopt a set of statewide academically rigorous content standards in the core curriculum areas of reading, writing, mathematics, history/social science, and science to serve as the basis for assessing the academic achievement of individual pupils and of schools. In addition, the Act established the Standardized Testing and Reporting Program (otherwise known as the STAR Program) his, which requires each school district to annually administer to all pupils in grades 2 to 1 a nationally normed achievement test of basic skills, and an achievement test based on the

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Former Education Code sections 13485-1 3490, as originally enacted by Statutes 197 1, chapter 36 1.

¹¹ Education Code sections 44662, 44663, 44664.

¹¹² Statutes 1999, chapter 4 became operative and effective on January 1, 2000.

¹¹³ Education Code section 60600 et seq.

Education Code section 60605, subdivision (a).

¹¹⁵ Education Code section 60640, subdivision (a).

state's academic content standards? The Commission determined that the administration of the STAR test to pupils constitutes a partial reimbursable state-mandated program (CSM 97-TC-23).

Although evaluating the performance of a certificated employee based on the progress of pupils is not new, the Commission finds that the requirement to evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted criterion referenced assessments is a new required act and, thus a higher level of service within the meaning of article XIII B, section 6 of the California Constitution.

This higher level of service is limited to the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- once each year for probationary certificated employees;
- every other year for permanent certificated employees; and
- beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree. 117

Assess and evaluate permanent certificated, instructional and non-instructional, employees that receive an unsatisfactory evaluation once each year until the employee achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498).

The claimant is requesting reimbursement to conduct additional assessments and evaluations for permanent certificated employees that receive an unsatisfactory evaluation as follows:

Conduct additional annual assessments and evaluations of permanent certificated instructional and non-instructional employees who have received an unsatisfactory evaluation. The school district must conduct the annual assessment and evaluation of a permanent certificated employee until the employee achieves a positive evaluation or is separated from the school district. This mandated activity is limited to those annual assessments and evaluations that occur in years in which the employee would not have been required to be evaluated as per Section 44664 (i.e., permanent certificated employees shall be evaluated every other year). When conducting these additional evaluations the full cost of the

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¹¹⁶ Education Code section 60640, subdivision (b).

Education Code section 44664, subdivision (a)(3), as amended by Statutes 2003, chapter 566.

evaluation is reimbursable (e.g., evaluation under all criterion, preparing written evaluation, review of comments, and holding a hearing with the teacher).

The Department of Finance agrees that the 1983 amendment to Education Code section 44664 imposes a reimbursable state-mandated activity.

Before the enactment of the test claim legislation, former Education Code section 13489 (as last amended by Stats. 1973, ch. 220) required that an evaluation for permanent certificated employees occur every other year. Former Education Code section 13489 stated in relevant part the following:

Evaluation and assessment of the performance of each certificated employee shall be made on a continuing basis, at least once each school year for probationary personnel, and at *least every other year for personnel with permanent status*. The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. In the event an employee is not perfonning his duties in a satisfactory manner according to the standards prescribed by the governing board, the employing authority shall notify the employee in writing of such fact and describe such unsatisfactory performance. The employing authority shall thereafter confer with the employee malting specific recommendations as to areas of improvement in the employee's performance and endeavor to assist him in such performance. (Emphasis added.)

In 1976, former Education Code section 13489 was renumbered to Education Code section 44664." The test claim legislation (Stats. 1983, ch. 498) amended Education Code section 44664, by adding the following sentence: "When any permanent certificated employee has received an unsatisfactory evaluation, the employing authority shall *annually evaluate* the employee until the employee achieves a positive evaluation or is separated from the district." (Emphasis added.) ¹²⁰

The Commission finds that Education Code section 44664, as amended by Statutes 1983, chapter 498, imposes a new required act and, thus, a new program or higher level of service by requiring school districts to perform additional evaluations for permanent certificated employees that perform the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation.

This higher level of service is limited to those annual assessments and evaluations that occur in years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year) and lasts until the employee achieves a positive evaluation or is separated from the school district. This additional evaluation

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Exhibit A (Test Claim) to Item 9 of the May 27, 2004 Commission Hearing.

¹¹⁹ Statutes 1976, chapter 1010.

[&]quot;when" to "if." The language now states the following: "When If any permanent certificated employee has received an unsatisfactory evaluation, the employing authority shall annually evaluate the employee until the employee achieves a positive evaluation or is separated from the district."

and assessment of the permanent certificated employee requires the school district to perform the following activities:

- evaluate and assess the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));
- the evaluation and assessment shall be reduced to writing. (Ed. Code, § 44663, subd. (a).) The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
- transmit a copy of the written evaluation to the certificated employee (Ed. Code, § **44663**, subd. (a));
- attach any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and
- conduct a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a)).

# Issue 3: Does Education Code Section 44662 (As Amended by Stats. 1999, ch. 4) and Education Code Section 44664 (As Amended by Stats. 1983, ch. 498) Impose Costs Mandated by the State Within the Meaning of Government Code Section 17514?

As indicated above, the Commission finds that the following activities constitute a new program or higher level of service:

- evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498);
- evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Ed. Code, § 44662, subd. (b), as amended by Stats, 1999, ch. 4); and
- assess and evaluate permanent certificated, instructional and non-instructional, employees that perform the requirements of educational programs mandated by state or federal law

and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated until the employee receives achieves a positive evaluation, or is separated from the school district (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498).

The Commission must continue its inquiry to determine if these activities result in increased costs mandated by the state pursuant to Government Code section 175 14.

Government Code section 175 14 defines "costs mandated by the state" as any increased cost a local agency or school district is required to incur as a result of a statute that mandates a new program or higher level of service. The claimant states that it has incurred significantly more than \$200 to comply with the test claim statutes plead in this claim. ^{121, 122}

The Commission finds that there is nothing in the record to dispute the costs alleged by the claimant. The parties have not identified any sources of state or federal funds appropriated to school districts that can be applied to the activities identified above. Moreover, none of the exceptions to finding a reimbursable state-mandated program under Government Code section 17556 apply to this claim.

Therefore, the Commission finds that Education Code section 44662 (as amended by Stats. 1999, ch. 4) and Education Code section 44664 (as amended by Stats. 1983, ch. 498), result in costs mandated by the state under Government Code section 17514.

### **CONCLUSION**

The Commission concludes that Education Code section 44662, as amended by Statutes 1999, chapter 4, and Education Code section 44664, as amended by Statutes 1983, chapter 498, mandate a new program or higher level of service for school districts within the meaning of article XIII B, section 6 of the California Constitution, and impose costs mandated by the state pursuant to Government Code section 175 14 for the following activities only:

• Evaluate and assess the performance of certificated instructional employees that perform the requirements of educational programs mandated by state or federal law as it reasonably relates to the instructional techniques and strategies used by the employee and the employee's adherence to curricular objectives (Ed. Code, § 44662, subd. (b), as amended by Stats. 1983, ch. 498).

Reimbursement for this activity is limited to the review of the employee's instructional techniques and strategies and adherence to curricular objectives, and to include in the written evaluation of the certificated instructional employees the assessment of these factors during the following evaluation periods:

- o once each year for probationary certificated employees;
- o every other year for permanent certificated employees; and

Exhibit A to Item 9 of the May 27, 2004 Commission Hearing (Test Claim and Declaration of Larry S. Phelps, Superintendent of Denair Unified School District).

¹²² After this test claim was filed, Government Code section 17564 was amended to require that all test claims and reimbursement claims submitted exceed \$1000 in costs. (Stats. 2002, ch. 1 124.)

- beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- Evaluate and assess the performance of certificated instructional employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11 as it reasonably relates to the progress of pupils towards the state adopted academic content standards as measured by state adopted assessment tests (Ed. Code, § 44662, subd. (b), as amended by Stats. 1999, ch. 4).

Reimbursement for this activity is limited to the review of the results of the STAR test as it reasonably relates to the performance of those certificated employees that teach reading, writing, mathematics, history/social science, and science in grades 2 to 11, and to include in the written evaluation of those certificated employees the assessment of the employee's performance based on the STAR results for the pupils they teach during the evaluation periods specified in Education Code section 44664, and described below:

- o once each year for probationary certificated employees;
- o every other year for permanent certificated employees; and
- beginning January 1, 2004, every five years for certificated employees with permanent status who have been employed at least ten years with the school district, are highly qualified (as defined in 20 U.S.C. § 7801), and whose previous evaluation rated the employee as meeting or exceeding standards, if the evaluator and certificated employee being evaluated agree.
- Assess and evaluate permanent certificated, instructional and non-instructional, employees that perfonn the requirements of educational programs mandated by state or federal law and receive an unsatisfactory evaluation in the years in which the permanent certificated employee would not have otherwise been evaluated pursuant to Education Code section 44664 (i.e., every other year). The additional evaluations shall last until the employee achieves a positive evaluation, or is separated from the school district. (Ed. Code, § 44664, as amended by Stats. 1983, ch. 498). This additional evaluation and assessment of the permanent certificated employee requires the school district to perform the following activities:
  - evaluate and assess the certificated employee performance as it reasonably relates to the following criteria: (1) the progress of pupils toward the standards established by the school district of expected pupil achievement at each grade level in each area of study, and, if applicable, the state adopted content standards as measured by state adopted criterion referenced assessments; (2) the instructional techniques and strategies used by the employee; (3) the employee's adherence to curricular objectives; (4) the establishment and maintenance of a suitable learning environment, within the scope of the employee's responsibilities; and, if applicable, (5) the fulfillment of other job responsibilities established by the school district for certificated non-instructional personnel (Ed. Code, § 44662, subds. (b) and (c));

- o the evaluation and assessment shall be reduced to writing. (Ed. Code, § 44663, subd. (a).) The evaluation shall include recommendations, if necessary, as to areas of improvement in the performance of the employee. If the employee is not performing his or her duties in a satisfactory manner according to the standards prescribed by the governing board, the school district shall notify the employee in writing of that fact and describe the unsatisfactory performance (Ed. Code, § 44664, subd. (b));
- transmit a copy of the written evaluation to the certificated employee (Ed. Code, § 44663, subd. (a));
- o attach any written reaction or response to the evaluation by the certificated employee to the employee's personnel file (Ed. Code, § 44663, subd. (a)); and
- o conduct a meeting with the certificated employee to discuss the evaluation (Ed. Code, § 44553, subd. (a)).

The Commission further finds that the activities listed above do not constitute reimbursable state-mandated programs with respect to certificated personnel employed in local, discretionary educational programs.

Finally, the Commission finds that all other statutes in the test claim not mentioned above are not reimbursable state-mandated programs within the meaning of article XIII B, section 6 and Government Code section 175 14.

### DECLARATION OF SERVICE BY MAIL

I, the undersigned, declare as follows:

I am a resident of the County of Sacramento and I am over the age of 18 years, and not a party to the within action. My place of employment is 980 Ninth Street, Suite 300, Sacramento, California 95 8 14.

June 1, 2004, I served the:

### **Adopted Statement of Decision**

The Stull Act, 98-TC-25
Education Code Sections 44660 – 44665 (forrnerly Ed. Code §§ 13485-13490)
Statutes 1975, Chapter 1216; Statutes 1983, Chapter 498; Statutes 1986, Chapter 393; Statutes 1995, Chapter 392; Statutes 1999, Chapter 4
Denair Unified School District, Claimant

by placing a true copy thereof in an envelope addressed to:

Mr. David Scribner
Executive Director
School Mandates Group
3 113 Catalina Island Road
West Sacramento, CA 95691

State Agencies and Interested Parties (See attached mailing list);

and by sealing and depositing said envelope in the United States mail at Sacramento, California, with postage thereon fully paid.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that this declaration was executed on

June 1, 2004, at Sacramento, California.

VICTORIA SORIÂNO