

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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Test Claim Decision, *The Stull Act*, 98-TC-25

SixTen and Associates

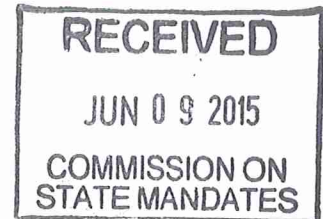
Mandate Reimbursement Services

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June 4, 2015

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



RE: 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,

A handwritten signature in blue ink, appearing to read "Keith B. Petersen".

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
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Filing Date:	<i>For GSM Use Only</i> RECEIVED JUN 09 2015 COMMISSION ON STATE MANDATES
IRC #:	14-9825-I-02

4. IDENTIFICATION OF STATUTES OR EXECUTIVE ORDERS

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

5. AMOUNT OF INCORRECT REDUCTION

<u>Fiscal Year</u>	<u>Amount of Reduction</u>
2005-2006	\$ 45,637
2006-2007	\$ 124,851
2007-2008	\$ 60,859
2008-2009	\$ 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 <u>1</u> to <u>19</u>
8. Controller's Payment Letters:	Exhibit <u>A</u>
9. Parameter's and Guidelines:	Exhibit <u>B</u>
10. Claiming Instructions:	Exhibit <u>C</u>
11. Final SCO Audit Report:	Exhibit <u>D</u>
12. Annual Reimbursement Claims:	Exhibit <u>E</u>

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 _____ Date 6-2-15

1 Claim Prepared by:
2 Keith B. Petersen, President
3 SixTen and Associates
4 P. O. Box 340430
5 Sacramento, California 95834-0430
6 Voice: (916) 419-7093
7 Fax: (916) 263-9701
8 kbpsixten@aol.com

9 BEFORE THE
10 COMMISSION ON STATE MANDATES
11 STATE OF CALIFORNIA

12 INCORRECT REDUCTION CLAIM OF:)

No. CSM _____

13)
14) Statutes 1983, Chapter 498

15) Statutes 1999, Chapter 4

16) Education Code Sections 44660-44665

17)
18 **CARLSBAD UNIFIED**)

The Stull Act

19)
20) **School District**)

Annual Reimbursement Claims:

21)
22) Claimant.)

Fiscal Year 2005-06

23) Fiscal Year 2006-07

24) Fiscal Year 2007-08

25) Fiscal Year 2008-09

26)
27)
28 _____) INCORRECT REDUCTION CLAIM FILING

29 PART I. AUTHORITY FOR THE CLAIM

30 The Commission on State Mandates has the authority pursuant to Government
31 Code Section 17551(d) to "... to hear and decide upon a claim by a local agency or
32 school district, filed on or after January 1, 1985, that the Controller has incorrectly
33 reduced payments to the local agency or school district pursuant to paragraph (2) of
34 subdivision (d) of Section 17561." Carlsbad Unified School District (hereafter "District")

Incorrect Reduction Claim of Carlsbad Unified School District
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1 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.

4 This incorrect reduction claim is timely filed. Title 2, CCR, Section 1185.1,
5 subdivision (c), requires incorrect reduction claims to be filed no later than three years
6 following the date of the Controller's remittance advice notifying the claimant of a
7 reduction. A Controller's audit report (Exhibit "D") dated June 15, 2012 has been
8 issued and constitutes a demand for repayment and adjudication of the claim. On July
9 13, 2012, the Controller issued "results of review letters" (Exhibit "A") reporting the audit
10 results and amounts due the state and this constitutes a payment action.

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

14 PART II. SUMMARY OF THE CLAIM

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

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

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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>	<u><\$29,533></u>
4	4 year Total	\$512,761	\$274,101	\$89,625	\$149,035

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

7 PART III. PREVIOUS INCORRECT REDUCTION CLAIMS

8 The District has not filed any previous incorrect reduction claims for this mandate
9 program. The District is aware of one incorrect reduction claim having been filed
10 (14-9825-I-01, Oceanside Unified School District), but it has not yet been adjudicated.

11 PART IV. BASIS FOR REIMBURSEMENT

12 1. Mandate Legislation

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

20 2. Test Claim

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

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1 Education Code sections 44553, 44662, 44663, and 44664, mandate a new program or
2 higher level of service for school districts within the meaning of article XIII B, section 6
3 of the California Constitution, and impose increased costs mandated by the state
4 pursuant to Government Code section 17514, for the following activities (SOD, 35-7):

- 5 - Evaluate and assess the performance of certificated instructional employees that
6 perform the requirements of educational programs mandated by state or federal
7 law as it reasonably relates to the instructional techniques and strategies used
8 by the employee and the employee's adherence to curricular objectives
9 Education Code section 44662, subdivision (b), as amended by Statutes 1983,
10 Chapter 498).

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

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

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1 evaluated agree.

2 - Evaluate and assess the performance of certificated instructional employees that
3 teach reading, writing, mathematics, history/social science, and science in
4 grades 2 to 11 as it reasonably relates to the progress of pupils towards the state
5 adopted academic content standards as measured by state adopted assessment
6 tests (Education Code section 44662, subdivision (b), as amended by Statutes
7 1999, Chapter 4).

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

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

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1 evaluated agree.

2 - Assess and evaluate permanent certificated, instructional and non-instructional,
3 employees that perform the requirements of educational programs mandated by
4 state or federal law and receive an unsatisfactory evaluation in the years in
5 which the permanent certificated employee would not have otherwise been
6 evaluated pursuant to Education Code section 44664 (i.e., every other year). The
7 additional evaluations shall last until the employee achieves a positive
8 evaluation, or is separated from the school district. (Education Code section
9 44664, as amended by Statutes 1983, Chapter 498). This additional evaluation
10 and assessment of the permanent certificated employee requires the school
 district to perform the following activities:

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

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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));

- o transmit a copy of the written evaluation to the certificated employee
12 (Education Code section 44663, subdivision (a));

- 13 o 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 o conduct a meeting with the certificated employee to discuss the evaluation
17 (Education Code section 44553, subdivision (a)).

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

1 3. Parameters and Guidelines

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

5 4. Claiming Instructions

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

12 (http://www.sco.ca.gov/Files-ARD-Local/Manuals/sd_1314_tsa260.pdf). However,

13 since the Controller's claim forms and instructions have not been adopted as
14 regulations, they have no force of law, and, therefore, have no effect on the outcome of
15 this incorrect reduction claim.

16 PART V. STATE CONTROLLER CLAIM ADJUDICATION

17 The Controller conducted an audit of the District's annual reimbursement claims
18 for Fiscal Years 2005-06, 2006-07, 2007-08, and 2008-09. The audit concluded that
19 46% of the District's costs, as claimed, were allowable. A copy of the June 15, 2012,
20 audit report is attached as Exhibit "D" and is incorporated herein by reference.

21 /

1 PART VI. CLAIMANT'S RESPONSE TO THE STATE CONTROLLER

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

6 PART VII. STATEMENT OF THE ISSUES

7 **FINDING Overstated salaries and benefits and related indirect costs**

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

12 **PART A. TIME STUDY ACTIVITIES**

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

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1 adjustment to the claimed costs.

2 3 Activities Allowed

- 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 19 Disallowed Activities

- 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;
- 11 5. Conducting actual conference with teachers;
- 12 6. Preparing or organizing notes from meetings with teachers;
- 13 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;

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- 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 19 activities can be organized into four groups of related activities:

10 1. Evaluation Conferences

11 Evaluation conferences are a method of implementing this mandate, and not just
12 a subject matter activity. The audit report (A.R., p. 7) concluded that:

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

18 The Controller has confused the subject matter of the old and new mandates
19 with the method of implementation. The Commission has already determined (SOD, p.
20 29, 30) that:

21 Under prior law, the evaluation had to be reduced to writing and a copy of the
22 evaluation given to the employee. An evaluation meeting had to be held between
23 the certificated employee and the evaluator to discuss the evaluation and
24 assessment.

25 The 1983 test claim statute still requires school districts to reduce the evaluation

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

- 8 0 the progress of students toward the established standards of expected
9 student achievement at each grade level in each area of study;
10 0 the instructional techniques and strategies used by the employee;
11 0 the employee's adherence to curricular objectives; and
12 0 the establishment and maintenance of a suitable learning environment,
13 within the scope of the employee's responsibilities.

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

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

1 2. Preparation Activities

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

18 3. Training Activities

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

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

1 original claims.

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

4 4. STAR Testing Results

5 The audit disallows the time to review the STAR test results without explanation.
6 The Commission (SOD, p. 32) determined that "the review of the results of the STAR
7 test as it reasonably relates to the performance of those certificated employees that
8 teach reading, writing, mathematics, history/social science, and science in grades 2 to
9 11, and to include in the written evaluation of those certificated employees the
10 assessment of the employee's performance based on the STAR results for the pupils
11 they teach during the evaluation periods specified in Education Code section 44664 . .
12 . ." is reimbursable.

13 PART B. COMPLETED EVALUATIONS

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

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

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1 The audit report (A.R., p. 15) asserts that these certificated employees are not
2 instructional personnel because:

3 The intent of this component is to evaluate the elements of classroom
4 instruction. Principals, vice principals, directors, coordinators, counselors,
5 psychologists, librarians, and library media specialists do not provide classroom
6 instruction and are considered "non-instructional" certificated personnel.
7 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 As enacted, the Stull Act was placed in Chapter 2 of Division 10 of the 1971
12 Education Code, a chapter addressing "Certificated Employees." Certificated
13 employees are those employees directly involved in the educational process and
14 include both instructional and non-instructional employees such as teachers,
15 administrators, supervisors, and principals." Certificated employees must be
16 properly credentialed for the specific position they hold. A "certificated person"
17 was defined in former Education Code section 12908 as "a person who holds
18 one or more documents such as a certificate, a credential, or a life diploma,
19 which singly or in combination license the holder to engage in the school service
20 designated in the document or documents." The definition of "certificated person"
21 governs the construction of Division 10 of the former Education Code and is not
22 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 Former Education Code section 13487 was also repealed and reenacted by
27 Statutes 1975, chapter 1216, as follows (amendments relevant to this issue are
28 underlined):

29 (a) The governing board of each school district shall establish standards of
30 expected student achievement at each grade level in each area of study.

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1 (b) The governing board of each school district shall evaluate and assess
2 certificated employee competency as it reasonably relates to (1) the
3 progress of students toward the established standards, (2) the
4 performance of those noninstructional duties and responsibilities,
5 including supervisory and advisory duties, as may be prescribed by the
6 board, and (3) the establishment and maintenance of a suitable learning
7 environment within the scope of the employee's responsibilities.

8 (c) The governing board of each school district shall establish and define job
9 responsibilities for those certificated noninstructional personnel, including,
10 but not limited to, supervisory and administrative personnel, whose
11 responsibilities cannot be evaluated appropriately under the provisions of
12 subdivision (b), and shall evaluate and assess the competency of such
13 noninstructional employees as it reasonably relates to the fulfillment of
14 those responsibilities. . . .

15 Without foundation in fact or law, the Controller has determined that certificated
16 personnel who are not supervisors or administrators are also not "instructional"
17 personnel because they may not provide full time classroom instruction. The Stull Act
18 does not make this distinction and neither did the Commission. It has not been
19 established as a matter of law that involvement in the educational process requires a
20 "classroom."

21 2. Preschool teachers do not perform the requirements of the program.

22 The audit report (A.R., p. 15) excludes preschool teachers in general based on
23 the Controller's opinion that preschool teachers do not perform the requirements of an
24 educational program *mandated by state or federal law*. The parameters and guidelines
25 (p. 3) state that:

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

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1 The Commission (SOD, p. 11) identified the voluntary programs in footnote 42 and
2 preschool is not included in that enumeration. In addition, the Stull Act only explicitly
3 excluded (SOD 17, 18) community college certificated employees, hourly adult
4 education instructors, and hourly and temporary certificated employees and substitute
5 teachers, but at the discretion of the local governing board. There is no stated basis to
6 exclude certificated preschool instructors.

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

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

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

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

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

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

1 properly disallowed evaluations, if any.

2 PART C. CALCULATION OF TRAINING COSTS

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

5 PART VIII. RELIEF REQUESTED

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

19 The District requests that the Commission make findings of fact and law on each
20 and every adjustment made by the Controller and each and every procedural and
21 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

3 By my signature below, I hereby declare, under penalty of perjury under the laws
4 of the State of California, that the information in this incorrect reduction claim
5 submission is true and complete to the best of my own knowledge or information or
6 belief, and that the attached documents are true and correct copies of documents
7 received from or sent by the state agency which originated the document.

8 Executed on June 2 2015, at Carlsbad, California, by

9 

10 **Suzanne O'Connell, Deputy Superintendent**
11 Administrative Services
12 Carlsbad Unified School District
13 6225 El Camino Real
14 Carlsbad, CA 92009-1604
15 Voice: 760-331-5036
16 Fax: 760-331-5094
17 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.

21 

22 **Suzanne O'Connell, Deputy Superintendent**
23 Administrative Services
24 Carlsbad Unified School District

6-2-15

Date

25 Attachments:

26 Exhibit "A" Controller's "results of review" letters July 13, 2012
27 Exhibit "B" Parameters and guidelines September 27, 2005
28 Exhibit "C" Controller's claiming Instructions December 12, 2005
29 Exhibit "D" Controller's audit report dated June 15, 2012
30 Exhibit "E" Annual claims FY 2005-06, 2006-07, 2007-08, and 2008-09



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

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 002
 2012/07/13

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 6225 EL CAMINO REAL
 CARLSBAD CA 92009

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 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,

JAY LAL, MANAGER

LOCAL REIMBURSEMENT SECTION
 P.O. BOX 942850 SACRAMENTO, CA 94250-5875



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

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 CARLSBAD CA 92009

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 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	-	<u>124,851.00</u>

AMOUNT DUE CLAIMANT		<u>\$ 43,370.00</u>
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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,

JAY LAL, MANAGER

LOCAL REIMBURSEMENT SECTION
 P.O. BOX 942850 SACRAMENTO, CA 94250-5875



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

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

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 JUL 16 2012
 FISCAL SERVICES

DEAR CLAIMANT:

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,

JAY LAL, MANAGER

LOCAL REIMBURSEMENT SECTION
 P.O. BOX 942850 SACRAMENTO, CA 94250-5875



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

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 2012/07/13

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BOARD OF TRUSTEES
 CARLSBAD UNIFIED SCHOOL DIST
 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 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	\$	<u>29,533.00</u>

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	-	42,754.00	
TOTAL ADJUSTMENTS			- 42,754.00
PRIOR PAYMENTS:			
SCHEDULE NO. MA03125A			
PAID 01-25-2011		-7,077.00	
SCHEDULE NO. MA04209A			
PAID 12-06-2010		-82,548.00	
TOTAL PRIOR PAYMENTS			-89,625.00

2008-09

SINCERELY,

JAY LAL, MANAGER

LOCAL REIMBURSEMENT SECTION
 P.O. BOX 942850 SACRAMENTO, CA 94250-5875

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;
 - 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.
- 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;
 - 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 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));
 - 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

- o 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:
 - 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.

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:

- 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.

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. Direct Cost Reporting

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, 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, 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 www.sco.ca.gov/ard/local/locreim/index.shtml.

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;
 - 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.
- 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;
 - 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 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));
 - 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

- o 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:
 - 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.

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:

- 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.

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, subs. (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. Direct Cost Reporting

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.

CLAIM FOR PAYMENT		For State Controller Use Only		Program
Pursuant to Government Code Section 17561		(19) Program Number 00260		260
THE STULL ACT		(20) Date Filed ___/___/___		
		(21) LRS Input ___/___/___		
L A B E L H E R E	(01) Claimant Identification Number		Reimbursement Claim Data	
	(02) Claimant Name		(22) SA -1, (03)(a)	
	County of Location		(23) SA -1, (03)(b)	
	Street Address or P.O. Box Suite		(24) SA -1, (04)(A)(1)(a)(f)	
	City State Zip Code		(25) SA -1, (04)(A)(1)(b)(f)	
	Type of Claim	Estimated Claim	Reimbursement Claim	(26) SA -1, (04)(A)(2)(a)(f)
		(03) Estimated <input type="checkbox"/>	(09) Reimbursement <input type="checkbox"/>	(27) SA -1, (04)(A)(2)(b)(f)
		(04) Combined <input type="checkbox"/>	(10) Combined <input type="checkbox"/>	(28) SA -1, (04)(B)(1)(a)(f)
		(05) Amended <input type="checkbox"/>	(11) Amended <input type="checkbox"/>	(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 Payment Received		(15)	(33) SA -1, (06)	
Net Claimed Amount		(16)	(34) SA -1, (07)	
Due from State	(08)	(17)	(35) SA -1, (09)	
Due to State		(18)	(36) SA -1, (10)	
(37) CERTIFICATION OF CLAIM				
<p>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.</p> <p>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.</p> <p>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.</p>				
Signature of Authorized Officer			Date	
_____			_____	
Type or Print Name			Title	
(38) Name of Contact Person for Claim			Telephone Number () - Ext.	
_____			_____	
E-Mail Address			_____	

Program 260	THE STULL ACT Certification Claim Form Instructions	FORM FAM-27
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- (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 filing a reimbursement claim, enter an "X" in the box on line (09) Reimbursement.
- (10) If filing 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 form 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 line (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**

Program 260	MANDATED COSTS THE STULL ACT CLAIM SUMMARY	FORM SA-1				
(01) Claimant		(02) Type of Claim Reimbursement <input type="checkbox"/> Estimated <input type="checkbox"/>				
		Fiscal Year ___ / ___				
(03) (a) Number of Certificated Instructional Employees (CIE's) evaluated per (04)(A)						
(b) Number of CIE's and Non-Instructional Employees (NIE's) evaluated per (04)(B)						
Direct Costs	Object Accounts					
(04) Reimbursable Components	(a) Salaries and Benefits	(b) Materials and Supplies	(c) Contract Services	(d) Fixed Assets	(e) Travel and Training	(f) Total
A. CIE's						
1.	Evaluation/Assessment - Ed. Code §44662, subd. (b), as amended by Ch. 498/83; Reimbursement period begins fy 1997-98					
a.	Review employee's techniques and strategies					
b.	Evaluation of techniques and strategies					
2.	Evaluation/Assessment - Ed. Code §44662, subd. (b), as amended by Ch. 4/99; Reimbursement period begins 03/15/99					
a.	Review STAR results					
b.	Assessment per STAR					
B. CIE's and NIE's						
1.	Evaluation/Assessment - Ed. Code §44664, subd. (b), as amended by Ch. 498/83; Reimbursement period begins fy 1997-98					
a.	Evaluating and assessing CIE per certain criteria					
b.	Writing evaluation					
c.	Transmitting evaluation					
d.	Attaching to personnel file					
e.	Discussing evaluation					
(05)	Total Direct Costs					
Indirect Costs						
(06)	Indirect Cost Rate [From J-380 or J-580]					%
(07)	Total Indirect Costs [Line (06) x line (05)(a)]					
(08)	Total Direct and Indirect Costs [Line (05)(f) + line (07)]					
Cost Reduction						
(09)	Less: Offsetting Savings					
(10)	Less: Other Reimbursements					
(11)	Total Claimed Amount [Line (08) - (line (09) + line (10))]					

Revised 01/06

Program 260	THE STULL ACT CLAIM SUMMARY Instructions	FORM SA-1
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- (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.

Program <b style="font-size: 24pt;">260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM SA-2
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(01) Claimant	(02) Fiscal Year
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE

<input type="checkbox"/> Review employee's techniques and strategies	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies
<input type="checkbox"/> Review STR Results	<input type="checkbox"/> Assessment based on STR results

B. CIE & NIE

<input type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing	<input type="checkbox"/> Transmitting evaluation to CIE
<input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Discussing evaluation with CIE	

(04) Description of Expenses			Object Accounts				
(a) Employee Names, Job Classifications, Functions Performed and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training

(05) Total <input type="checkbox"/> Subtotal <input type="checkbox"/> Page: ___ of ___						
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Program 260	THE STULL ACT COMPONENT/ACTIVITY COST DETAIL Instructions	FORM SA-2
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- (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.
- (04) 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 Accounts	Columns								Submit supporting documents with the claim
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	
Salaries and Benefits	Employee Name/Title	Hourly Rate	Hours Worked	Salaries = Hourly Rate x Hours Worked					
Salaries									
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	
Travel									
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.

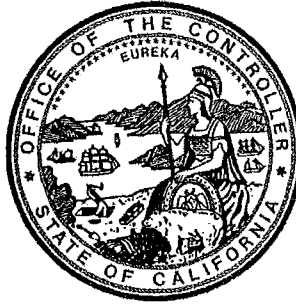
CARLSBAD UNIFIED SCHOOL DISTRICT

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

Schedule 1 (continued)

Cost Elements	Actual Costs Claimed	Allowable per Audit	Audit Adjustment
<u>July 1, 2008, through June 30, 2009</u>			
Direct costs:			
Salaries and benefits			
Evaluation activities	\$ 96,252	\$ 56,594	\$ (39,658)
Training	608	—	(608)
Total direct costs	96,860	56,594	(40,266)
Indirect costs	5,986	3,498	(2,488)
Total program costs	<u>\$ 102,846</u>	60,092	<u>\$ (42,754)</u>
Less amount paid by the State		(89,625)	
Allowable costs claimed in excess of (less than) amount paid		<u>\$ (29,533)</u>	
<u>Summary: July 1, 2005, through June 30, 2009</u>			
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	<u>\$ 512,761</u>	238,660	<u>\$ (274,101)</u>
Less amount paid by the State		(89,625)	
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 149,035</u>	

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:

	Fiscal Year				Total
	2005-06	2006-07	2007-08	2008-09	
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:

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

	Fiscal Year				Total
	2005-06	2006-07	2007-08	2008-09	
(A) Allowable evaluations	160	106	201	147	
(B) Allowable hours per evaluation	× 5.14	× 5.14	5.14	5.14	
(C) Total annual hours [(A) × (B)]	822.4	544.8	1,033.1	755.6	
(D) Average PHR	× \$65.76	× \$69.67	× \$68.34	× \$74.90	
Total evaluation salaries and benefits [(C) × (D)]	\$ 54,081	\$ 37,956	\$ 70,602	\$ 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:

	Fiscal Year				Total
	2005-06	2006-07	2007-08	2008-09	
Claimed	\$ 2,193	\$ 2,965	\$ 1,640	\$ 608	\$ 7,406
Allowable	2,193	2,775	1,549	—	6,517
Audit adjustment	\$ —	\$ (190)	\$ (91)	\$ (608)	\$ (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 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.

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 than 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				Total
	2005-06	2006-07	2007-08	2008-09	
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**



Carlsbad Unified School District

6225 El Camino Real • Carlsbad, CA 92009
(760) 331-5000 • FAX (760) 431-6707

... 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
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.

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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.*

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.

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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.

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. Millikin 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

Mr. Jim Spano

5

May 9, 2012

05/06/09 Evaluation -- 5 Year
10/19/09 Signed 5-Year Evaluation Agreement

Christine Kunkel

02/21/08 Changed status from Temporary to Probationary
06/13/08 Evaluation -- Probationary
05/11/09 Evaluation -- Permanent (1st year)

Joseph Purser

02/13/07 Evaluation -- Temporary
05/02/08 Evaluation -- Probationary
05/12/09 Evaluation -- Permanent
04/29/11 Evaluation -- Permanent

Management Representation Letter

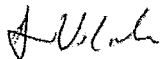
The District will not be providing the requested management representation letter since it could be construed as a waiver of future appeal rights.

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

c: 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 ten and Associates Mandate Reimbursement Services

KEITH B. PETERSEN, President

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

Sacramento
3270 Arena Blvd., Suite 400-363
Sacramento, CA 95834
Telephone: (916) 419-7093
Fax: (916) 263-9701
E-Mail: kbpsixten@aol.com

CLAIM FILE COPY

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	Caregiver 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,



for Larry Hendee, Vice-President

CLAIM FOR PAYMENT Pursuant to Government Code Section 17561 THE STULL ACT	For State Controller Use Only	Program 260
	(19) Program Number 00260	
	(20) Date Filed <u> </u> / <u> </u> / <u> </u>	
	(21) LRS Input <u> </u> / <u> </u> / <u> </u>	

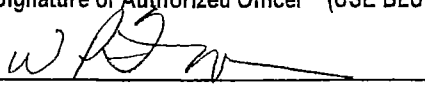
Claimant Identification Number: S37030		Reimbursement Claim Data	
(02) Claimant Name	Carlsbad Unified School District	(22) FORM-1, (03)(A)(f)	28,491
Address	San Diego County	(23) FORM-1, (03)(B)(f)	13,696
	6225 El Camino Real	(24) FORM-1, (03)(C)(f)	36,876
	Carlsbad CA 92009	(25) FORM-1, (03)(D)(f)	17,431
Type of Claim	Estimated Claim	Reimbursement Claim	
	(03) Estimated <input type="checkbox"/>	(09) Reimbursement <input checked="" type="checkbox"/>	(26) FORM-1, (03)(E)(f) 146
	(04) Combined <input type="checkbox"/>	(10) Combined <input type="checkbox"/>	(27) FORM-1, (03)(F)(f) 88
	(05) Amended <input type="checkbox"/>	(11) Amended <input type="checkbox"/>	(28) FORM-1, (03)(G)(f) 59
			(29) FORM-1, (03)(H)(f) 73
Fiscal Year of cost	(06) 2008-2009	(12)	(30) FORM-1, (03)(I)(f)
Total Claimed Amount	(07) \$ 102,846	(13)	(31) FORM-1, (05) 6
Less: 10% Late Penalty (refer to claiming instructions)	(14) \$	(14)	(32) FORM-1, (06) 5,986
Less: Prior Claim Payment Received	(15) \$	(15)	(33) FORM-1, (08)
Net Claimed Amount	(16) \$ 102,846	(16)	(34) FORM-1, (09)
Due from State	(08) \$ 102,846	(17)	(35)
Due to State	(18)	(18)	(36)

(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.

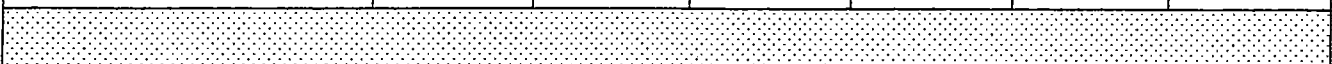
The amounts for this Estimated Claim and/or Reimbursement Claim are hereby claimed from the State for payment of estimated and/or actual costs set forth on the attached statements. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Signature of Authorized Officer (USE BLUE INK) 	Date 1-25-10
Walter Freeman Type or Print Name	Assistant Superintendent, Business Services Title
3) Name of Contact Person for Claim SixTen and Associates	Telephone Number: (858) 514-8605 E-mail Address: kbpsixten@aol.com

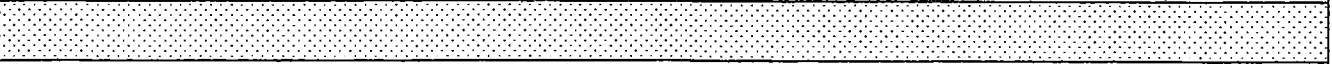
Program 260	MANDATED COSTS THE STULL ACT CLAIM SUMMARY	FORM 1
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(01) Claimant: Carlsbad Unified School District	(02)	Fiscal Year 2008-2009
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Direct Costs		Object Accounts					
(03) Reimbursable Activities		(a) Salaries and Benefits	(b) Materials and Supplies	(c) Contract Services	(d) Fixed Assets	(e) Travel and Training	(f) Total
A.	Reviewing Employee's Techniques and Strategies	\$ 28,490.72	\$ -	\$ -	\$ -	\$ -	\$ 28,490.72
B.	Reviewing STR Results	\$ 13,695.88	\$ -	\$ -	\$ -	\$ -	\$ 13,695.88
C.	Evaluation to Include Assessment of Techniques and Strategies	\$ 36,876.34	\$ -	\$ -	\$ -	\$ -	\$ 36,876.34
D.	Assessing Based on STR Results	\$ 17,431.12	\$ -	\$ -	\$ -	\$ -	\$ 17,431.12
E.	Evaluating and Assessing CIE Based on Certain Criteria	\$ 146.48	\$ -	\$ -	\$ -	\$ -	\$ 146.48
F.	Attaching Response to Personnel File	\$ 87.89	\$ -	\$ -	\$ -	\$ -	\$ 87.89
G.	Reducing Evaluation to Writing	\$ 58.59	\$ -	\$ -	\$ -	\$ -	\$ 58.59
H.	Discussing Evaluation with CIE	\$ 73.24	\$ -	\$ -	\$ -	\$ -	\$ 73.24
I.	Transmitting Evaluation to CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(04) Total Direct Costs		\$ 96,860.26	\$ -	\$ -	\$ -	\$ -	\$ 96,860.26



Indirect Costs		
(05) Indirect Cost Rate	[From J-380 or J-580]	6.18%
(06) Total Indirect Costs	[Line (05) x line (04)(a)]	\$ 5,985.96
(07) Total Direct and Indirect Costs	[Line (04)(f) + line (06)]	\$ 102,846.22



Cost Reduction		
(08) Less: Offsetting Savings		\$ -
(09) Less: Other Reimbursements		\$ -
(10) Total Claimed Amount	[Line (07) - {Line (08) + Line (09)}]	\$ 102,846.22

Revised 01/09

**MANDATED COSTS
THE STULL ACT
COMPONENT/ACTIVITY COST DETAIL**

**FORM
2**

(01) Claimant: **Marlehead Unified School District** (02) Fiscal Year: **2008-2009**

(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

A. CIE

Review employee's techniques and strategies Evaluation to include assessment of techniques and strategies

Review STR Results Assessment based on STR results

B. CIE & NIE

Evaluating and assessing CIE according to certain criteria Reducing evaluation to writing Transmitting evaluation to CIE

Attaching response to personnel file Discussing evaluation with CIE

(04) Description of Expenses			Object Accounts				
(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	\$64.41	1.0	\$ 64.41				
Lord, Bill Assistant Principal	\$71.73	1.5	\$ 107.60				
Morales, J. Cesar Assistant Principal	\$71.01	2.0	\$ 142.02				
Discussing the CIE's goals and objectives							
Administrators Various	\$73.24	136.5	\$ 9,997.26				
Observation conference and discussion with CIE							
Administrators Various	\$73.24	110.2	\$ 8,071.05				
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				

(05) Total Subtotal Page 1 of 1 \$ 28,490.72 \$ - \$ - \$ - \$ -

Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM 2
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(01) Claimant Madison Unified School District	(02) Fiscal Year 2008-2009
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(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

A. CIE

<input type="checkbox"/> Review employee's techniques and strategies	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies
<input checked="" type="checkbox"/> Review STR Results	<input type="checkbox"/> Assessment based on STR results

B. CIE & NIE

<input type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing	<input type="checkbox"/> Transmitting evaluation to CIE
<input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Discussing evaluation with CIE	

(04) Description of Expenses	Object Accounts						
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Discussing the CIE's goals and objectives 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				
Preparing to evaluate and assess the performance of a CIE Administrators Various	\$73.24	66.5	\$ 4,870.46				
(05) Total <input checked="" type="checkbox"/> Subtotal <input type="checkbox"/>			\$ 13,695.88	\$ -	\$ -	\$ -	\$ -

Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM 2
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(01) Claimant Ardenwood Unified School District	(02) Fiscal Year 2008-2009
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE

<input type="checkbox"/> Review employee's techniques and strategies	<input checked="" type="checkbox"/> Evaluation to include assessment of techniques and strategies
<input type="checkbox"/> Review STR Results	<input type="checkbox"/> Assessment based on STR results

B. CIE & NIE

<input type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing	<input type="checkbox"/> Transmitting evaluation to CIE
<input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Discussing evaluation with CIE	

(04) Description of Expenses	Object Accounts						
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) 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				
Reducing evaluation to writing, forward to personnel file Administrators Various	\$73.24	62.9	\$ 4,606.80				

(05) Total	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	Page 1 of 1	\$ 36,876.34	\$ -	\$ -	\$ -	\$ -
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Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM 2
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(01) Claimant Ardsbad Unified School District	(02) Fiscal Year 2008-2009
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE

<input type="checkbox"/> Review employee's techniques and strategies	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies
<input type="checkbox"/> Review STR Results	<input checked="" type="checkbox"/> Assessment based on STR results

B. CIE & NIE

<input type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing	<input type="checkbox"/> Transmitting evaluation to CIE
<input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Discussing evaluation with CIE	

(04) Description of Expenses			Object Accounts								
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) 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 Administrators Various	\$73.24	75.2	\$ 5,507.65								
Post-observation conference and discussion with CIE Administrators Various	\$73.24	69.6	\$ 5,097.50								
<table style="width:100%;"> <tr> <td style="width:5%;">(05) Total</td> <td style="width:5%; text-align: center;"><input checked="" type="checkbox"/></td> <td style="width:15%;">Subtotal</td> <td style="width:5%; text-align: center;"><input type="checkbox"/></td> </tr> </table>			(05) Total	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	\$ 17,431.12	\$ -	\$ -	\$ -	\$ -
(05) Total	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>								

Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM 2
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(01) Claimant Lisle Unified School District	(02) Fiscal Year 2008-2009
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(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

A. CIE	<input type="checkbox"/> Review employee's techniques and strategies	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies
	<input type="checkbox"/> Review STR Results	<input type="checkbox"/> Assessment based on STR results
B. CIE & NIE	<input checked="" type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing
	<input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Discussing evaluation with CIE
		<input type="checkbox"/> Transmitting evaluation to CIE

(04) Description of Expenses				Object Accounts			
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Classroom observation to evaluate and assess performance Administrators Various	\$73.24	0.7	\$ 51.27				
Pre-observation conference and discussion with CIE or NIE Administrators 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				

(05) Total <input checked="" type="checkbox"/>	Subtotal <input type="checkbox"/>	Page 1 of 1	\$ 146.48	\$ -	\$ -	\$ -	\$ -
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Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM 2
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(01) Claimant Parkland Unified School District	(02) Fiscal Year 2008-2009
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE <input type="checkbox"/> Review employee's techniques and strategies <input type="checkbox"/> Review STR Results	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies <input type="checkbox"/> Assessment based on STR results
B. CIE & NIE <input type="checkbox"/> Evaluating and assessing CIE according to certain criteria <input checked="" type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Reducing evaluation to writing <input type="checkbox"/> Transmitting evaluation to CIE <input type="checkbox"/> Discussing evaluation with CIE

(04) Description of Expenses			Object Accounts				
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Forward the evaluation to the personnel file of the CIE or NIE Administrators Various	\$73.24	1.2	\$ 87.89				

(05) Total <input checked="" type="checkbox"/>	Subtotal <input type="checkbox"/>	Page 1 of 1	\$ 87.89	\$ -	\$ -	\$ -	\$ -
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Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM 2
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(01) Claimant ... Unified School District	(02) Fiscal Year 2008-2009
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE <input type="checkbox"/> Review employee's techniques and strategies <input type="checkbox"/> Review STR Results	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies <input type="checkbox"/> Assessment based on STR results
B. CIE & NIE <input type="checkbox"/> Evaluating and assessing CIE according to certain criteria <input type="checkbox"/> Attaching response to personnel file	<input checked="" type="checkbox"/> Reducing evaluation to writing <input type="checkbox"/> Discussing evaluation with CIE

(04) Description of Expenses	Object Accounts						
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Reducing evaluation of CIE or NIE to writing Administrators Various	\$73.24	0.8	\$ 58.59				

(05) Total <input checked="" type="checkbox"/>	Subtotal <input type="checkbox"/>	Page 1 of 1	\$ 58.59	\$ -	\$ -	\$ -	\$ -
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Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM 2
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(01) Claimant Madison Unified School District	(02) Fiscal Year 2008-2009
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE	<input type="checkbox"/> Review employee's techniques and strategies	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies
	<input type="checkbox"/> Review STR Results	<input type="checkbox"/> Assessment based on STR results
B. CIE & NIE	<input type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing
	<input type="checkbox"/> Attaching response to personnel file	<input checked="" type="checkbox"/> Discussing evaluation with CIE
		<input type="checkbox"/> Transmitting evaluation to CIE

(04) Description of Expenses			Object Accounts				
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Post-observation conference and discussion with CIE or NIE Administrators Various	\$73.24	1.0	\$ 73.24				

(05) Total <input checked="" type="checkbox"/>	Subtotal <input type="checkbox"/>	Page 1 of 1	\$ 73.24	\$ -	\$ -	\$ -	\$ -
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Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
08-09	66.50	Administrators	Various	\$73.24	\$4,870.46	Preparing to evaluate and assess the performance of a CIE	Review STAR results
08-09	134.00	Administrators	Various	\$73.24	\$9,814.16	Preparing to evaluate and assess the performance of a CIE	Review employee's techniques and strategies
08-09	66.30	Administrators	Various	\$73.24	\$4,855.81	Discussing the CIE's goals and objectives	Review STAR results
08-09	136.50	Administrators	Various	\$73.24	\$9,997.26	Discussing the CIE's goals and objectives	Review employee's techniques and strategies
08-09	54.20	Administrators	Various	\$73.24	\$3,969.61	Pre-observation conference and discussion with CIE	Review STAR results
08-09	110.20	Administrators	Various	\$73.24	\$8,071.05	Pre-observation conference and discussion with CIE	Review employee's techniques and strategies
08-09	93.20	Administrators	Various	\$73.24	\$6,825.97	Classroom observation to evaluate and assess performance	Assessment based on STAR results
08-09	175.30	Administrators	Various	\$73.24	\$12,838.97	Classroom observation to evaluate and assess performance	Evaluation to include assessment of techniques and strategies
08-09	69.60	Administrators	Various	\$73.24	\$5,097.50	Post-observation conference and discussion with CIE	Assessment based on STAR results
08-09	118.30	Administrators	Various	\$73.24	\$8,664.29	Post-observation conference and discussion with CIE	Evaluation to include assessment of techniques and strategies
08-09	75.20	Administrators	Various	\$73.24	\$5,507.65	Discussing evaluation and write-up with CIE	Assessment based on STAR results
08-09	147.00	Administrators	Various	\$73.24	\$10,766.28	Discussing evaluation and write-up with CIE	Evaluation to include assessment of techniques and strategies
08-09	62.90	Administrators	Various	\$73.24	\$4,606.80	Reducing evaluation to writing, forward to personnel file	Evaluation to include assessment of techniques and strategies
08-09	0.70	Administrators	Various	\$73.24	\$51.27	Preparing to evaluate and assess the performance of a CIE or NIE	Evaluating and assessing CIE according to certain criteria
08-09	0.60	Administrators	Various	\$73.24	\$43.94	Pre-observation conference and discussion with CIE or NIE	Evaluating and assessing CIE according to certain criteria
08-09	0.70	Administrators	Various	\$73.24	\$51.27	Classroom observation to evaluate and assess performance	Evaluating and assessing CIE according to certain criteria
08-09	0.80	Administrators	Various	\$73.24	\$58.59	Reducing evaluation of CIE or NIE to writing	Reducing evaluation to writing
08-09	1.00	Administrators	Various	\$73.24	\$73.24	Post-observation conference and discussion with CIE or NIE	Discussing evaluation with CIE
08-09	1.20	Administrators	Various	\$73.24	\$87.89	Forward the evaluation to the personnel file of the CIE or NIE	Attaching response to personnel file
	1,314.20	Administrators Total			\$96,252.01		
08-09	1.50	Bloomquist, Tom	Assistant Principal	\$75.31	\$112.97	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	1.50	Bloomquist, Tom Total			\$112.97		
08-09	1.50	Giordani, Marjorie	Assistant Principal	\$67.98	\$101.97	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	1.50	Giordani, Marjorie Total			\$101.97		
08-09	1.00	Kalk, Dave	Assistant Principal	\$64.41	\$64.41	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	1.00	Kalk, Dave Total			\$64.41		
08-09	1.50	Lord, Bill	Assistant Principal	\$71.73	\$107.60	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	1.50	Lord, Bill Total			\$107.60		
08-09	1.00	Millikin, Carolyn	Principal	\$79.28	\$79.28	Training staff that will be performing the evaluations	Review employee's techniques and strategies
	1.00	Millikin, Carolyn Total			\$79.28		
08-09	2.00	Morales, J. Cesar	Assistant Principal	\$71.01	\$142.02	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	2.00	Morales, J. Cesar Total			\$142.02		
	1,322.70	Grand Total			\$96,860.26		

Combined Schedule 1
 Carlsbad Unified School District
 Stull Act 498/83
 Temporary, 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**

- (A) 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
 Temporary, 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
	<u>66.5</u>	<u>134.0</u>
Code 12		
Temporary	10.3	23.2
Probationary	1.4	3.1
Permanent	54.6	110.3
	<u>66.3</u>	<u>136.5</u>
Code 13		
Temporary	9.1	19.0
Probationary	1.0	1.9
Permanent	44.1	89.3
	<u>54.2</u>	<u>110.2</u>
Code 14		
Temporary	12.7	29.6
Probationary	1.8	4.0
Permanent	78.8	141.8
	<u>93.2</u>	<u>175.3</u>
Code 15		
Temporary	10.1	21.1
Probationary	1.7	2.6
Permanent	57.8	94.5
	<u>69.6</u>	<u>118.3</u>
Code 16		
Temporary	10.6	23.2
Probationary	1.7	3.1
Permanent	63.0	120.8
	<u>75.2</u>	<u>147.0</u>
Code 17		
Temporary		9.3
Probationary		1.1
Permanent		52.5
		<u>62.9</u>

***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

Conclusion: Findings go to Combined Schedule 1.

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

***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

Conclusion: Findings will go forward to Combined Schedule 2.

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

District/COE: Carlsbad Unified Sch. Dist.

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 Statistical Data	Fiscal Year		
	06-07	07-08	08-09
1 A K-12 Probationary Teachers- Total Number			6
1 B K-12 Permanent Teachers- Total Number			484
1 C K-12 Temporary Teachers- Total Number			29
1 D K-12 Classroom Teachers- A + B+ C = Total Number			519
2 A K-12 Probationary Teachers- Total Number Evaluated			5
2 B K-12 Permanent Teachers- Total Number Evaluated			189
2 C K-12 Temporary Teachers- Total Number Evaluated			38
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated			232
3* K-12 Categorical/Grant Teachers- Total Number Evaluated			5
4 Reimbursable K-12 Evaluations- Line 2 D subtract Line 3			227

*E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52176 LEP/Bilingual
 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
 U.S.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant- funded personnel

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 Mary Kuhn Date 9-28-08
 Print Employee Name Mary Kuhn Position or Title Exec. Asst. Personnel
 If you have any questions, please contact Mary Kuhn at 760-331-5026
 PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

*Activity Codes in Minutes	2006-2007		2007-2008		2008-2009		Average	
	A	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

***Evaluation Criteria**

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

Conclusion: Findings to go forward to Schedule 1A

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

Schoolsite	Staff	*Activity Codes in Minutes															
		11				12				13				14			
		A	B	C	D	A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Elementary																	
Aviara Oaks Middle	David Kalk	5	5	5	5	10	10	10	10	10	10	10	10	10	10	10	10
Buena Vista	Carolyn Millikin	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Calavera Hills Elementary	Tina Howard	5	5	5	5	20				5				10	10	5	5
Calavera Hills Middle	Leslie Harden	10				15	15				5	5		5	15	15	10
Carlsbad High	Tom Bloomquist	15				15				15				**240			
	Marjorie Giordani	15				15				15				5			
	Bill Lord	15				15				15				120			
	Margaret Stanchi	30				30				30				**300			
Carlsbad Village Academy	Keith Holley	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
Hope	Richard Tubbs	10				10	10	10	10	10	10	10	10	10	15	15	10
Jefferson	Jane Hartman	**200	10	10	10	**300	**200	**200	**100	20	20	20	20	30	30	30	30
Kelly	Tressie Armstrong	10	10	10	10	50	50	50	50	25	25	25	25	25	25	25	25
Magnolia	Jimmy Hines				15				30				15				30
Pacific Rim	Robert Devich																30
Poinsettia	Steve Ahl	10	10	10	10	10	10	10	10	10	10	10	10		30		
Valley Middle	Chad Lund					20	20	20	20	20	20	20	20	30	30	30	30
	J. Cesar Morales					15	15	15	15	12	12	12	12	12	12	12	12
Averages		20	19	20	19	23	26	27	27	21	21	21	21	24	24	23	21
Summation of criteria B and C		39				52				44				47			
Averages to be used		20	35			20	50			20	40			25	45		

***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

Conclusion: Findings will go forward to Schedule 1AA.

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

Schoolsite	Staff	*Activity Codes in Minutes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Elementary													
Aviara Oaks Middle	David Kalk	10	10	10	10	20	20	20	10	5	5	5	5
	Carolyn Millikin	10	10	10	10	15	15	15	15	5	5	5	5
Buena Vista	Tina Howard	5	5	5	5	10	10	10	5	5	20	20	20
Calavera Hills Elementary	Leslie Harden	5	10	10	5	5	10	10	5		30		
Calavera Hills Middle													
	Tom Bloomquist	40				20							
Carlsbad High	Marjorie Giordani	30				30							
	Bill Lord	30				30							
	Margaret Stanchi	45				30				**120			
Carlsbad Village Academy	Keith Holley	30	30	30	30	90	90	90	90	60	60	60	60
Hope	Richard Tubbs	5	10	15	10	5	10	5	5	10	15	15	10
Jefferson	Jane Hartman	20	20	20	20	20	20	20	20	20	20	20	20
Kelly	Tressie Armstrong	30	30	30	30	30	30	30	30	30	30	30	30
Magnolia	Jimmy Hines				15				30				
Pacific Rim	Robert Devich				30				30				
Poinsettia	Steve Ahl				15								
Valley Middle	Chad Lund	20	20	20	20	20	20	20	20		5		
	J. Cesar Morales	12	12	12	12	18	12	12	12				
Averages		22	16	16	16	24	24	23	23	24	21	22	21
Summation of criteria B and C		32				46				22			
Averages to be used		20	30			20				20			

***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

Conclusion: Findings will go forward to Schedule 1AA.

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

SA 1.7-1A

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.

CLUSD
 District/COE

Acorn
 Department/Location

David Kane
 Employee Name

Asst. Principal
 Exact Position Title

Telephone # _____
 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	5	5	5	5
Code 12	Goals and objectives conference with instructor	10	10	10	10
Code 13	Pre-observation conference with instructor	10	10	10	10
Code 14	Classroom observation of instructor	5	20	20	5
Code 15	Post-observation conference with instructor	10	10	10	10
Code 16	Final conference with instructor	10	20	20	10
Code 17	District Reporting	5	5	5	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 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 [Signature] Date 9/28/09

you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Caroly

SA 1.7-1A

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.

Carlsbad USD
District/COE

Aoms
Department/Location

Carolyn Millikin
Employee Name

Principal
Exact Position Title

331-6199
Telephone #

12mo/11mo/10mo/hrly
Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
Circle the years for which you are responding.

3
Temps

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	10	10	10	10
Code 12 Goals and objectives conference with instructor	10	10	10	10
Code 13 Pre-observation conference with instructor	10	10	10	10
Code 14 Classroom observation of instructor		20	20	10
Code 15 Post-observation conference with instructor		10	10	10
Code 16 Final conference with instructor		15	15	15
Code 17 District Reporting		5	5	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 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 Carolyn Millikin Date 9-28-09

if you have any questions, please contact _____, at _____
PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

CUSD
 District/COE

B-V
 Department/Location

Tina Howard
 Employee Name

Principal
 Exact Position Title

331-5199 Telephone #
12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	5	5	5	5
Code 12	Goals and objectives conference with instructor	20			
Code 13	Pre-observation conference with instructor	5			
Code 14	Classroom observation of instructor	10	10	5	5
Code 15	Post-observation conference with instructor	5	5	5	5
Code 16	Final conference with instructor	10	10	5	5
Code 17	District Reporting	20	20	20	20

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 [Signature] Date 10/24/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

District/COE CUSD

Department/Location CHE

Employee Name L Hardie

Exact Position Title Principal

Telephone # 3316300 12mo/11mo/10mo/hry
 Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding

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
- 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

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			
		A	B	C	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	-	5	5	-
Code 14	Classroom observation of instructor	5	15	15	10
Code 15	Post-observation conference with instructor	5	10	10	5
Code 16	Final conference with instructor	5	10	10	5
Code 17	District Reporting		30		

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 L Hardie Date 11/24/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

CUSD
 District/COE

CHS / Admin.
 Department/Location

Tom Bloomquist
 Employee Name

Assistant Principal
 Exact Position Title

331-5198 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
		A	B	C	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	240			
Code 15	Post-observation conference with instructor	40			
Code 16	Final conference with instructor	20			
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 [Signature] Date 9-22-09

if you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

Carlsbad Unified
 District/COE

CHS Administration
 Department/Location

Marjorie Giordani
 Employee Name

Assistant Principal
 Exact Position Title

(760) 331-5196 Telephone # 12mo / (11mo) / 10mo/hrly
 Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	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	5			
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 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 M. Giordani Date 9/22/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CUSD
 District/COE

Admin/CHS
 Department/Location

Bill Lord
 Employee Name

Assist Principal
 Exact Position Title

3315197 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	120			
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 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 [Signature] Date 9/29/09

if you have any questions, please contact Bill Lord at 3315197

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

SA 1.7-1A

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.

CUSD
 District/COE

CHS
 Department/Location

MARGARET Stanchi
 Employee Name

Principal
 Exact Position Title

760-331-5199 Telephone #
12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	30			
Code 12	Goals and objectives conference with instructor	30			
Code 13	Pre-observation conference with instructor	30			
Code 14	Classroom observation of instructor	200			
Code 15	Post-observation conference with instructor	45			
Code 16	Final conference with instructor	30			
Code 17	District Reporting	120			

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 Margaret Stanchi Date 9/24/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Handwritten initials

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

SA 1.7-1A

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.

CUSD
 District/COE

CVA
 Department/Location

Keith Holley
 Employee Name

Director
 Exact Position Title

331-5200 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	90	90	90	90
Code 12	Goals and objectives conference with instructor	90	90	90	90
Code 13	Pre-observation conference with instructor	90	90	90	90
Code 14	Classroom observation of instructor	60	60	60	60
Code 15	Post-observation conference with instructor	30	30	30	30
Code 16	Final conference with instructor	90	90	90	90
Code 17	District Reporting	60	60	60	60

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 Keith Holley Date 7/25/09

if you have any questions, please contact Keith Holley, at 331-5200

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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.

CARLSBAD
 District/COE

HOPE
 Department/Location

RICHARD TOBBS
 Employee Name

PRINCIPAL
 Exact Position Title

331-5400 Telephone #
12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10			
Code 12	Goals and objectives conference with instructor	10	10	10	10
Code 13	Pre-observation conference with instructor	10	10	10	0
Code 14	Classroom observation of instructor	10	15	15	10
Code 15	Post-observation conference with instructor	5	10	15	10
Code 16	Final conference with instructor	5	10	5	5
Code 17	District Reporting	10	15	15	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 your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature Richard Tobbs Date 9/28/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

C. S. S. S. S.
 District/COE

J. S. S. S.
 Department/Location

Jane Hartman
 Employee Name

Principal
 Exact Position/Title

760 331-5599 Telephone # 12mo Work year length(circle)
 11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	200	10	10	10
Code 12	Goals and objectives conference with instructor	300	200	200	150
Code 13	Pre-observation conference with instructor	20	20	20	20
Code 14	Classroom observation of instructor	30	30	30	30
Code 15	Post-observation conference with instructor	20	20	20	20
Code 16	Final conference with instructor	20	20	20	20
Code 17	District Reporting	20	20	20	20

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 Jane Hartman Date 9-11-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

District/COE CLUSD

KELLY SCHOOL

Department/Location

Employee Name Tressie Armstrong

Exact Position Title Principal

Telephone # _____
 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	10	10	10
Code 12	Goals and objectives conference with instructor	50	50	50	50
Code 13	Pre-observation conference with instructor	25	25	25	25
Code 14	Classroom observation of instructor	25	25	25	25
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

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 T. Armstrong Date 9/15/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

*George Ford
 Principal
 10/12/09*

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.

CUSD
 District/COE

MAONOLIA
 Department/Location

TIMMY HINES
 Employee Name

PRINCIPAL
 Exact Position Title

760-331-5600 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation				15
Code 12	Goals and objectives conference with instructor				30
Code 13	Pre-observation conference with instructor				15
Code 14	Classroom observation of instructor				30
Code 15	Post-observation conference with instructor				15
Code 16	Final conference with instructor				30
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 *Jimmy Hines* Date 10/12/09

if you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

CUSD
 District/COE

Pac Rim
 Department/Location

Robert Devich
 Employee Name

Principal
 Exact Position Title

331-6200 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		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				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 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 [Signature] Date 9-29-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

CUSD
 District/COE

Poinsettia
 Department/Location

Steve Ahlb
 Employee Name

Principal
 Exact Position Title

(760) 331-6500
 Telephone #

(2mo) 11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	10	10	10	10
Code 12 Goals and objectives conference with instructor	10	10	10	10
Code 13 Pre-observation conference with instructor	10	10	10	10
Code 14 Classroom observation of instructor	30			30
Code 15 Post-observation conference with instructor		15		
Code 16 Final conference with instructor				
Code 17 District Reporting		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 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 [Signature] Date 11-10-09

If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

CLAD
 District/COE

Vms
 Department/Location

CLAD LWS
 Employee Name

AP
 Exact Position Title

321-4300 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation				
Code 12	Goals and objectives conference with instructor	20	20	20	20
Code 13	Pre-observation conference with instructor	20	20	20	20
Code 14	Classroom observation of instructor	30	30	30	30
Code 15	Post-observation conference with instructor	20	20	20	20
Code 16	Final conference with instructor	20	20	20	20
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 _____ Date 9/30/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1A

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.

District/COE CUSD J. CESAR MORALES
 Department/Location Valley Middle School
 Employee Name [Signature]
 Exact Position Title Principal
 Telephone # 760-321-5399 Work year length(circle) 12mo/11mo/10mo/hrly
 Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

- 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
 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

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			
		A	B	C	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	12
Code 15	Post-observation conference with instructor	12	12	12	12
Code 16	Final conference with instructor	12	12	12	12
Code 17	District Reporting	18	12	12	12

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 [Signature] Date 10-1-07
 you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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	5	5
Avg. time p/ evaluation preparation	16.0	31.7
Total Time (in minutes)	<u>80</u>	<u>158</u>
Per Hour	60	60
Hours Worked (Code 11)	<u>1.3</u>	<u>2.6</u>
# of reimbursable K-12 evaluations	5	5
Avg. time p/ goals & obj. conf. with instructor	16.7	36.7
Total Time (in minutes)	<u>83</u>	<u>183</u>
Per Hour	60	60
Hours Worked (Code 12)	<u>1.4</u>	<u>3.1</u>
# of reimbursable K-12 evaluations	5	5
Avg. time p/ pre-observation conf. with instructor	12.0	23.3
Total Time (in minutes)	<u>60</u>	<u>117</u>
Per Hour	60	60
Hours Worked (Code 13)	<u>1.0</u>	<u>1.9</u>
# of reimbursable K-12 evaluations	5	5
Avg. time p/ classroom observation of instructor	21.7	48.3
Total Time (in minutes)	<u>108</u>	<u>242</u>
Per Hour	60	60
Hours Worked (Code 14)	<u>1.8</u>	<u>4.0</u>
# of reimbursable K-12 evaluations	5	5
Avg. time p/ post-observation conf. with instructor	20.0	31.7
Total Time (in minutes)	<u>100</u>	<u>158</u>
Per Hour	60	60
Hours Worked (Code 15)	<u>1.7</u>	<u>2.6</u>
# of reimbursable K-12 evaluations	5	5
Avg. time p/ final conf. with instructor	20.0	36.7
Total Time (in minutes)	<u>100</u>	<u>183</u>
Per Hour	60	60
Hours Worked (Code 16)	<u>1.7</u>	<u>3.1</u>
# of reimbursable K-12 evaluations		5
Avg. time p/ district reporting		13.3
Total Time (in minutes)		<u>67</u>
Per Hour		60
Hours Worked (Code 17)		<u>1.1</u>

***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

Conclusion: Findings will go forward to Combined Schedule 2.

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

District/COE: Carlsbad Unified Sch. Dist.

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 Statistical Data	Fiscal Year		
	06-07	07-08	08-09
1 A K-12 Probationary Teachers- Total Number			6
1 B K-12 Permanent Teachers- Total Number			484
1 C K-12 Temporary Teachers- Total Number			29
1 D K-12 Classroom Teachers- A + B+ C = Total Number			519
2 A K-12 Probationary Teachers- Total Number Evaluated			5
2 B K-12 Permanent Teachers- Total Number Evaluated			189
2 C K-12 Temporary Teachers- Total Number Evaluated			38
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated			232
3* K-12 Categorical/Grant Teachers- Total Number Evaluated			5
4 Reimbursable K-12 Evaluations- Line 2 D subtract Line 3			227

*E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52176 LEP/Bilingual
 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
 U.S.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant- funded personnel

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 Mary Kuhn Date 9-28-08
 Print Employee Name Mary Kuhn Position or Title Exec. Ass't Personnel
 If you have any questions, please contact Mary Kuhn at 760-331-5026
 PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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 Stull Act.
 Source: Schedule 4.
 Findings:

Probationary Evaluations

*Activity Codes in Minutes	2006-2007		2007-2008		2008-2009		Average	
	A	B&C	A	B&C	A	B&C	A	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

***Evaluation Criteria**

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

Conclusion: Findings to go forward to schedule 1B.

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

Schoolsite	Staff	*Activity Codes in Minutes															
		11				12				13				14			
		A	B	C	D	A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Elementary	David Kalk	5	5	5	5	10	10	10	10	10	10	10	10	10	10	10	10
Aviara Oaks Middle	Carolyn Millikin	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Buena Vista	Tina Howard	5	5	5	5	20				5				10	10	5	5
Calavera Hills Elementary	Leslie Harden	10				15	15				5	5		5	15	15	10
Calavera Hills Middle	Tom Bloomquist	15				15				15				**240			
Carlsbad High	Marjorie Giordani	15				15				15				5			
	Bill Lord	15				15				15				120			
	Margaret Stanchi	30				20				20				**300			
Hope	Richard Tubbs	10				10	10	10	10	10	10	10	10	10	15	15	10
Kelly	Tressie Armstrong	10	10	10	10	50	50	50	50	25	25	25	25	25	25	25	25
Magnolia	Jimmy Hines				15				30				15				30
Pacific Rim	Robert Devich				30				60				30				30
Poinsettia	Steve Ahl	10	10	10	10	10	10	10	10	10	10	10	10				30
Valley Middle	Chad Lund					20	20	20	20	20	20	20	20	30	30	30	30
	J. Cesar Morales					15	15	15	15	12	12	12	12	12	12	12	12
Averages		13	8	8	12	17	18	18	24	35	24	14	13	13	13	17	17
Summation of criteria B and C		16				35				26				37			
Averages to be used		13				15				14				25			
		15				35				25				35			

***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

Conclusion: Findings will go forward to Schedule 1BB.

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

Schoolsite	Staff	*Activity Codes in Minutes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Elementary	David Kalk	10	10	10	10	10	20	20	10	5	5	5	5
Aviara Oaks Middle	Carolyn Millikin	10	10	10	10	15	15	15	15	5	5	5	5
Buena Vista	Tina Howard	5	5	5	5	10	10	5	5	20	20	20	20
Calavera Hills Elementary	Leslie Harden	5	10	10	5	5	10	10	5	30			
Calavera Hills Middle	Tom Bloomquist	40				20							
Carlsbad High	Marjorie Giordani	30				30							
	Bill Lord	30				30							
	Margaret Stanchi	45				30				**120			
Hope	Richard Tubbs	5	10	15	10	5	10	5	5	10	15	15	10
Kelly	Tressie Armstrong	30	30	30	30	30	30	30	30	30	30	30	30
Magnolia	Jimmy Hines				15				30				
Pacific Rim	Robert Devich				30				30				
Poinsettia	Steve Ahl				15								
Valley Middle	Chad Lund	20	20	20	20	20	20	20	20				
	J. Cesar Morales	12	12	12	12	18	18	18	18				
Averages		21	14	14	15	19	17	15	17	16	18	15	14
Summation of criteria B and C		28				32				16			
Averages to be used		20				15				15			

***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

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

SA 1.7-1B

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.

CUUSD
 District/COE

ADM
 Department/Location

David Kark
 Employee Name

Asst. Principal
 Exact Position Title

331-6100 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	5	5	5	5
Code 12	Goals and objectives conference with instructor	10	10	10	10
Code 13	Pre-observation conference with instructor	10	10	10	10
Code 14	Classroom observation of instructor	5	20	20	5
Code 15	Post-observation conference with instructor	10	10	10	10
Code 16	Final conference with instructor	10	20	20	10
Code 17	District Reporting	5	5	5	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 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 [Signature] Date 9/28/09

if you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

Carlsbad USD District/COE
Carolyn Millikin Employee Name
331-6199 Telephone #
12mo/11mo/10mo/hrly Work year length(circle)
Aoms Department/Location
Principal Exact Position Title
 Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

Prob

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	10	10	10
Code 12	Goals and objectives conference with instructor	10	10	10	10
Code 13	Pre-observation conference with instructor	10	10	10	10
Code 14	Classroom observation of instructor		20	20	10
Code 15	Post-observation conference with instructor		10	10	10
Code 16	Final conference with instructor		15	15	15
Code 17	District Reporting		5	5	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 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 Carolyn Millikin Date 9-28-09

if you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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.

CLUSD
 District/COE

B.V.
 Department/Location

Tina Howard
 Employee Name

Reimburse
 Exact Position Title

331-5499
 Telephone #

12mo/11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	5	5	5	5
Code 12	Goals and objectives conference with instructor	20			
Code 13	Pre-observation conference with instructor	5			
Code 14	Classroom observation of instructor	10	10	5	5
Code 15	Post-observation conference with instructor	5	5	5	5
Code 16	Final conference with instructor	10	10	5	5
Code 17	District Reporting	20	20	20	20

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 [Signature] Date 10/12/07

If you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

SA 1.7-1B

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 CUSD

Department/Location CHS

Employee Name L Harder

Exact Position Title Principal

Telephone # 3316300 Work year/length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation				
Code 12	Goals and objectives conference with instructor		10		
Code 13	Pre-observation conference with instructor	15	15		
Code 14	Classroom observation of instructor		5	5	
Code 15	Post-observation conference with instructor	5	15	15	10
Code 16	Final conference with instructor	5	10	10	5
Code 17	District Reporting	5	10	10	5
			30		

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 L Harder Date 11/21/09

If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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
 District/COE

CHS / Admin.
 Department/Location

Tom Bloomquist
 Employee Name

Assistant Principal
 Exact Position Title

331-5198
 Telephone #

12mo/11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding

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
- 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

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			
		A	B	C	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	340			
Code 15	Post-observation conference with instructor	40			
Code 16	Final conference with instructor	20			
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 [Signature] Date 9-22-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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.

Carlsbad Unified
 District/COE

CHS Administration
 Department/Location

Marjorie Giordani
 Employee Name

Assistant Principal
 Exact Position Title

(760) 331-5196 Telephone # 12mo (11mo) / 10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	5			
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 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 [Signature] Date 9/22/09

if you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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
 District/COE

Admin / CHS
 Department/Location

Bill Lora
 Employee Name

Assist Principal
 Exact Position Title

(260) 3315197 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	20			
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 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 [Signature] Date 9/29/09

If you have any questions, please contact Bill Lora, at 3315197

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

SA 1.7-1B

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.

CUUSD
 District/COE

CHS
 Department/Location

MARGARET STANCH
 Employee Name

PRINCIPAL
 Exact Position Title

331-5199 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	30			
Code 12	Goals and objectives conference with instructor	20			
Code 13	Pre-observation conference with instructor	20			
Code 14	Classroom observation of instructor	300			
Code 15	Post-observation conference with instructor	45			
Code 16	Final conference with instructor	30			
Code 17	District Reporting	120			

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 Margaret Stanch Date 9/24/09
 if you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

Handwritten initials

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

SA 1.7-1B

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 CARLSBAD

Department/Location HOPE

Employee Name RICHARD TOBBS

Exact Position Title PRINCIPAL

Telephone # 331-5900 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10			
Code 12	Goals and objectives conference with instructor	10	10	10	10
Code 13	Pre-observation conference with instructor	10	10	10	0
Code 14	Classroom observation of instructor	10	15	15	10
Code 15	Post-observation conference with instructor	5	10	15	10
Code 16	Final conference with instructor	5	10	5	5
Code 17	District Reporting	10	15	15	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 your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature Richard Tobbs Date 9/28/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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
 District/COE

KELLY SCHOOL

Tressie Armstrong
 Employee Name

Department/Location

Principal
 Exact Position Title

Telephone # 12mo/11mo/10mo/hrly
 Work-year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	10	10	10
Code 12	Goals and objectives conference with instructor	50	50	50	50
Code 13	Pre-observation conference with instructor	25	25	25	25
Code 14	Classroom observation of instructor	25	25	25	25
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

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 T. Armstrong Date 9/15/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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 CUSD

Department/Location Mammoth

Employee Name Jimmy Hines

Exact Position Title Principal

Telephone # 760-331-5600 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation				15
Code 12	Goals and objectives conference with instructor				30
Code 13	Pre-observation conference with instructor				15
Code 14	Classroom observation of instructor				30
Code 15	Post-observation conference with instructor				15
Code 16	Final conference with instructor				30
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 [Signature] Date 10/12/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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
 District/COE

Pac Rim
 Department/Location

Robert Devich
 Employee Name

Principal
 Exact Position Title

331-6200 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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				

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 [Signature] Date 9-29-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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.

CUUSD
 District/COE
Steve Ahl
 Employee Name
(760) 331-6500
 Telephone #

Pomona
 Department/Location
Principal
 Exact Position Title

(12)mo/11mo/10mo/hrly
 Work year length(circle)
 Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	10	10	10	10
Code 12 Goals and objectives conference with instructor	10	10	10	10
Code 13 Pre-observation conference with instructor		10		
Code 14 Classroom observation of instructor		30		
Code 15 Post-observation conference with instructor		15		
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 [Signature] Date 11-10-09

If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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 CUSD Department/Location Vms
 Employee Name CHAD CUMMIS Exact Position Title AP
 Telephone # 331-5300 Work year length(circle) 12mo/11mo/10mo/hrly Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation				
Code 12	Goals and objectives conference with instructor	20	20	20	20
Code 13	Pre-observation conference with instructor	20	20	20	20
Code 14	Classroom observation of instructor	30	30	30	30
Code 15	Post-observation conference with instructor	20	20	20	20
Code 16	Final conference with instructor	20	20	20	20
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 [Signature] Date 9/30/08
 If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1B

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
 District/COE

Valley Middle School
 Department/Location

P. Cesar Morales
 Employee Name

Teacher
 Exact Position Title

760-331-5399 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	12
Code 15	Post-observation conference with instructor	12	12	12	12
Code 16	Final conference with instructor	18	18	15	8
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 [Signature] Date 10/1/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

***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

Conclusion: Findings will go forward to Combined Schedule 1.

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

District/COE: Carlsbad Unified Sch. Dist.

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 Statistical Data	Fiscal Year		
	06-07	07-08	08-09
1 A K-12 Probationary Teachers- Total Number			6
1 B K-12 Permanent Teachers- Total Number			484
1 C K-12 Temporary Teachers- Total Number			29
1 D K-12 Classroom Teachers- A + B+ C = Total Number			519
2 A K-12 Probationary Teachers- Total Number Evaluated			5
2 B K-12 Permanent Teachers- Total Number Evaluated			189
2 C K-12 Temporary Teachers- Total Number Evaluated			38
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated			232
3* K-12 Categorical/Grant Teachers- Total Number Evaluated			5
4 Reimbursable K-12 Evaluations- Line 2 D subtract Line 3			227

*E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52176 LEP/Bilingual
 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
 U.S.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant- funded personnel

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 Mary Kuhn Date 9-28-08
 Print Employee Name Mary Kuhn Position or Title Exec. Asst. Personnel
 If you have any questions, please contact Mary Kuhn at 760-331-5026

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

Propose: To calculate a 3 year rolling average to be used for the 2008-2009 Stull Act.
 Source: Schedule 5.
 Findings:

Permanent Evaluations

*Activity Codes in Minutes	2006-2007		2007-2008		2008-2009		Average	
	A	B&C	A	B&C	A	B&C	A	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

***Evaluation Criteria**

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

Conclusion: Findings to go forward to Schedule 1C.

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

Schoolsite	Staff	*Activity Codes in Minutes											
		11			12			13			14		
		A	B	C	A	B	C	A	B	C	A	B	C
Aviara Oaks Elementary													
Aviara Oaks Middle	David Kalk	5	5	5	10	10	10	10	10	10	10	10	10
Calavera Hills Elementary	Carolyn Millikin	10	10	10	10	10	10	10	10	10	10	10	10
Calavera Hills Middle	Leslie Harden	10			15	15		5	5		5	15	15
	Catina Hancock	60			5	5	5	5	10	10	10	30	30
	Tom Bloomquist	15			15						120		
Carlsbad High	Marjorie Giordani	15			15			15			5		
	Bill Lord	15			15			15			60		
	Margaret Stanchi	20			20			15			**240		
Carlsbad Village Academy	Keith Holley	90	90	90	90	90	90	90	90	90	90	60	60
Hope	Richard Tubbs	5	5		5	10	5	5	5	5	5	10	10
Jefferson	Jane Hartman	30	5	5	15	15	15	5	5	5	5	15	15
Kelly	Tressie Armstrong	10	10	10	50	50	50	25	25	25	25	25	25
Magnolia	Jimmy Hines			15			30				15		30
Pacific Rim	Robert Devich			30			60				30		30
Poinsettia	Steve Ahi	10	10	10	10	10	10	10	10	10		30	
Valley Middle	J. Cesar Morales				15	15	15	12	12	12	12	12	12
	Chad Lund				**150	**150	**150	**450	**450	**450	**600	**600	**600
Averages		24	18	22	22	21	23	27	19	18	19	21	23
Summation of criteria B and C		40	40	40	46	45	45	37	37	37	47	47	47
Averages to be used		20	40	40	20	45	45	15	35	35	30	45	45

*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

Conclusion: Findings will go forward to Schedule 1CC.

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

Schoolsite	Staff	*Activity Codes in Minutes														
		15						16						17		
		A	B	C	D	A	B	C	D	A	B	C	D			
Aviara Oaks Elementary	David Kalk	10	10	10	10	10	20	20	10	5	5	5	5			
Aviara Oaks Middle	Carolyn Millikin	10	10	10	10	10	10	10	10	5	5	5	5			
Calavera Hills Elementary	Leslie Harden	5	10	10	5	5	10	10	5		30					
Calavera Hills Middle	Catrina Hancock	10	10	10	10	10	10	10	10							
Carlsbad High	Tom Bloomquist	20					20									
	Marjorie Giordani	30					30									
	Bill Lord	30					30									
	Margaret Stanchi	40					30			**120						
Carlsbad Village Academy	Keith Holley	30	30	30	30	90	90	90	60	60	60	60				
Hope	Richard Tubbs	5	10	10	10	5	10	10	5	10	15	10				
Jefferson	Jane Hartman	5	5	5	5	5	5	5	5	15	15	15				
Kelly	Tressie Armstrong	30	30	30	30	30	30	30	30	30	30	30				
Magnolia	Jimmy Hines				15				30							
Pacific Rim	Robert Devich				30				30							
Poinsettia	Steve Ahl		15													
Valley Middle	J. Cesar Morales	12	12	12	12	18	18	18	18							
	Chad Lund	**450	**450	**450	**450	**300	**300	**300	**300	**300	**300	**300	**300			
Averages		19	14	14	15	24	23	22	22	24	23	22	21			
Summation of criteria B and C		28					45				23					
Averages to be used		15	25			20	45			20	45		20			

- *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

Conclusion: Findings will go forward to Schedule 1CC.

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD
District/COE

Aviara OAK
Department/Location

Dario Kark
Employee Name

Asst Principal
Exact Position Title

331-6100 12mo/11mo/10mo/hrly
Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	5	5	5	5
Code 12	Goals and objectives conference with instructor	10	10	10	10
Code 13	Pre-observation conference with instructor	10	10	10	10
Code 14	Classroom observation of instructor	5	20	20	5
Code 15	Post-observation conference with instructor	10	10	10	10
Code 16	Final conference with instructor	10	20	20	10
Code 17	District Reporting	5	5	5	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 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 [Signature] Date 9/28/09

If you have any questions, please contact _____, at _____
PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

Carolyn

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.

Carlsbad USD
 District/COE

Aoms
 Department/Location

Carolyn Millikin
 Employee Name

Principal
 Exact Position Title

331-6199 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	10	10	10	10
Code 12 Goals and objectives conference with instructor	10	10	10	10
Code 13 Pre-observation conference with instructor	10	10	10	10
Code 14 Classroom observation of instructor		20	20	10
Code 15 Post-observation conference with instructor		10	10	10
Code 16 Final conference with instructor		10	10	10
Code 17 District Reporting		5	5	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 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 *Carolyn M. Millikin* Date 9-28-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

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/COE CUSD

Department/Location CSE

Employee Name L Harder

Exact Position Title Principal

Telephone # 3316300 Work year length(circle) 12mo / 11mo / 10mo/hrlly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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		5	5	
Code 14	Classroom observation of instructor	5	5	5	10
Code 15	Post-observation conference with instructor	5	10	10	5
Code 16	Final conference with instructor	5	10	10	5
Code 17	District Reporting		30		

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 L Harder Date 1/24/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE CUSD

Schoolsite/Department/Location Ctms CALAVERA HILLS

Employee Name Catina Hancock

Exact Position Title Principal

Telephone # 331-6400 Work year length(circle) 12mo/11mo/10mo/hrlly

Fiscal Year: 07-08 08-09 09-10
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	60			
Code 12	Goals and objectives conference with instructor	5	5	5	5
Code 13	Pre-observation conference with instructor	10	10	10	10
Code 14	Classroom observation of instructor		30	30	10
Code 15	Post-observation conference with instructor	10	10	10	10
Code 16	Final conference with instructor	10	10	10	10
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 [Signature] Date 11/16/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

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/COE CUSD

Department/Location CHS / Admin.

Employee Name Tom Bloomquist

Exact Position Title Assistant Principal

Telephone # 331-5198 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	120			
Code 15	Post-observation conference with instructor	20			
Code 16	Final conference with instructor	20			
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 [Signature] Date 9-22-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

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.

Carlsbad Unified
 District/COE

CHS Administration
 Department/Location

Mariorie Giordani
 Employee Name

Assistant Principal
 Exact Position Title

(760) 331-5198 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	5			
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 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 [Signature] Date 9/20/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

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.

CUSD
 District/COE

Admin / CHS
 Department/Location

Bill Lord
 Employee Name

Assist Principal
 Exact Position Title

(760) 3315197 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	60			
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 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 [Signature] Date 9/29/09
 if you have any questions, please contact Bill Lord at 3315197

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD
 District/COE
MARIA SANCHEZ
 Employee Name
331-5199
 Telephone #

CAS
 Department/Location
PRINCIPAL
 Exact Position Title
 Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	20			
Code 12	Goals and objectives conference with instructor	20			↓
Code 13	Pre-observation conference with instructor	15			
Code 14	Classroom observation of instructor	240			
Code 15	Post-observation conference with instructor	40			
Code 16	Final conference with instructor	30			
Code 17	District Reporting	120			

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: [Signature] Date: 9/24/19

If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

AP
11/5

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

SA 1.7-1C

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.

CUSD
 District/COE

CVA VILLAGES ACADEMY
 Department/Location

Keith Holley
 Employee Name

Director
 Exact Position Title

331-5200 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

- | | |
|---|---|
| Reimbursable Activities Codes: | Evaluation Criteria: |
| Code 11 Preparing for the evaluation | (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			
		A	B	C	D
Code 11	Preparing for the evaluation	90	90	90	90
Code 12	Goals and objectives conference with instructor	90	90	90	90
Code 13	Pre-observation conference with instructor	90	90	90	90
Code 14	Classroom observation of instructor	60	60	60	60
Code 15	Post-observation conference with instructor	30	30	30	30
Code 16	Final conference with instructor	90	90	90	90
Code 17	District Reporting	60	60	60	60

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 Keith Holley Date 9/24/07
 If you have any questions, please contact Keith Holley at 331-5200
 PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

SA 1.7-1C

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.

CARLSBAD
 District/COE

HOPE
 Department/Location

RICHARD TUBBS
 Employee Name

PRINCIPAL
 Exact Position Title

331-5900 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	5	5		
Code 12	Goals and objectives conference with instructor	5	10	5	5
Code 13	Pre-observation conference with instructor	5	5	5	5
Code 14	Classroom observation of instructor	5	10	10	10
Code 15	Post-observation conference with instructor	5	10	10	10
Code 16	Final conference with instructor	5	10	10	5
Code 17	District Reporting	10	15	15	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 your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature Richard Tubbs Date 9/28/07

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

Carlsbad
District/COE

Jefferson
Department/Location

Jane Hartman
Employee Name

Principal
Exact Position Title

391-5599 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
		A	B	C	D
Code 11	Preparing for the evaluation	30	5	5	5
Code 12	Goals and objectives conference with instructor	15	15	15	15
Code 13	Pre-observation conference with instructor	5	5	5	5
Code 14	Classroom observation of instructor	15	15	15	15
Code 15	Post-observation conference with instructor	5	5	5	5
Code 16	Final conference with instructor	5	5	5	5
Code 17	District Reporting	15	15	15	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 on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature Jane Hartman Date 9-11-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUUSD
 District/COE
Tressie Armstrong
 Employee Name

KELLY SCHOOL
 Department/Location
Principal
 Exact Position Title

Telephone # _____
12mo/11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	---	---	→
Code 12	Goals and objectives conference with instructor	50	---	---	→
Code 13	Pre-observation conference with instructor	25	---	---	→
Code 14	Classroom observation of instructor	25	---	---	→
Code 15	Post-observation conference with instructor	30	---	---	→
Code 16	Final conference with instructor	30	---	---	→
Code 17	District Reporting	30	---	---	→

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: [Signature] Date: 9/15/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

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/COE CUSD

Department/Location Manteca

Employee Name Jimmy Hines

Exact Position Title Principal

Telephone # 760-331-5600 12mo/11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation				
Code 12	Goals and objectives conference with instructor				15
Code 13	Pre-observation conference with instructor				30
Code 14	Classroom observation of instructor				15
Code 15	Post-observation conference with instructor				30
Code 16	Final conference with instructor				15
Code 17	District Reporting				30

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 [Signature] Date 10/12/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____ TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD
 District/COE

Pac Rim
 Department/Location

Robert Devich
 Employee Name

Principal
 Exact Position Title

331-6200 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
		A	B	C	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				

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 09-29-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

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.

CUSD
 District/COE

Poinsettia
 Department/Location

Steve Ahe
 Employee Name

Principal
 Exact Position Title

(76) 331-6500 Telephone # (12) mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	10	10	10	10
Code 12 Goals and objectives conference with instructor	10	10	10	10
Code 13 Pre-observation conference with instructor		10		
Code 14 Classroom observation of instructor		30		
Code 15 Post-observation conference with instructor		15		
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 Steve Ahe Date 11-10-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

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.

CUSD
 District/COE SICEST MORALE Department/Location UMS VALLEY MIDDLES
 Employee Name [Signature] Exact Position Title Principal
 Telephone # 760-271-1389 Work year length(circle) 12mo/11mo/10mo/hrly Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

- 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
 - 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

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			
		A	B	C	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	12
Code 15	Post-observation conference with instructor	12	12	12	12
Code 16	Final conference with instructor	18	18	18	18
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 [Signature] Date 10-1-09
 you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

SA 1.7-1C

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/COE CUSD

Department/Location VMS - office

Employee Name CHAD LUND

Exact Position Title Assist Principal

Telephone # 760)331-5300 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation				
Code 12	Goals and objectives conference with instructor	150	150	150	150
Code 13	Pre-observation conference with instructor	450	450	450	450
Code 14	Classroom observation of instructor	600	600	600	600
Code 15	Post-observation conference with instructor	450	450	450	450
Code 16	Final conference with instructor	300	300	300	300
Code 17	District Reporting	300	300	300	300

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 [Signature] Date 7/30/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

***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:

Schoolsite	Staff	*Activity Codes					
		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							
Calavera Hills Middle							
Carlsbad High	Margaret Stanchi	30	20	30	45	15	15
Carlsbad Village Academy							
Hope							
Jefferson							
Kelly							
Magnolia							
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

**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

District/COE: CUSD D.O.

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

Statistical Data: Certificate Staff on Unsatisfactory Status	Fiscal Year		
	06-07	07-08	08-09
5 K-12 Permanent Instructors:			
A. Number on unsatisfactory status			3
B. Number of re-evaluations			1
6 Permanent Non-Instructors:			
A. Number on unsatisfactory status			
B. Number of re-evaluations			
7 Reimbursable Re-evaluations 5 B + 6 B = Total			

Non-reimbursable re-evaluations (Do not include in the statistics above)

1. Any positions funded by these categoricals:

- E.C. 52012 School Improvement
- E.C. 52176 LEP/Bilingual
- E.C. 54425(b) Chapter 1 Federal compensatory education
- E.C. 54444.2 Migrant Children
- E.C. 62002.5 State Categorical
- E.C. 52065 Native American
- E.C. 52852 Coordinated Categorical
- E.C. 54724 Drop-out Prevention
- U.S.C. 25; 2604 Indian School Assistance Act

2. Any position that is grant-funded

3. Re-evaluations of temporary and long-term substitute teachers.

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 Mary Kuhn Date 9-30-09
 Print Name Mary Kuhn Position or Title Exec. Asst. Pers.
 If you have any questions, please contact Mary Kuhn at 760-331-5026
 PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

Employee AVERAGE Time Record for Mandated Costs
 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.

Carlsbad USD
 District/COE

Adams
 Department/Location

Carolyn Millikin
 Employee Name

Principal
 Exact Position Title

331-6199 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 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	50
Code 22 Meeting(s) with the employee	50
Code 23 Observation(s) of the employee	50
Code 24 Reducing the evaluation to writing	/
Code 25 Post-evaluation conference(s) with the employee	50
Code 26 Filing evaluation and recordkeeping	75

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: [Signature] Date 10/6/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Employee AVERAGE Time Record for Mandated Costs
 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
 District/COE

B.V.
 Department/Location

Tina Howard
 Employee Name

Principal
 Exact Position Title

331-5499 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
 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	12 hrs
Code 22 Meeting(s) with the employee	15 hrs
Code 23 Observation(s) of the employee	75 hrs
Code 24 Reducing the evaluation to writing	30 hrs
Code 25 Post-evaluation conference(s) with the employee	2 hrs
Code 26 Filing evaluation and recordkeeping	2 hrs.

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 Tina Howard Date 9/10/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Employee AVERAGE Time Record for Mandated Costs

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.

District/COE CU 50

Department/Location CHS

Employee Name MARGARET SANCHEZ

Exact Position Title Principal

Telephone # _____
 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 06-07 07-08 08-09
 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	30
Code 22	Meeting(s) with the employee	20
Code 23	Observation(s) of the employee	30
Code 24	Reducing the evaluation to writing	45
Code 25	Post-evaluation conference(s) with the employee	15
Code 26	Filing evaluation and recordkeeping	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 on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature Margaret Sanchez Date 9/24/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Employee AVERAGE Time Record for Mandated Costs

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
District/COE

Torrie Norton
Employee Name

760-331-5025
Telephone #

Personnel
Department/Location

Asst. Supt.
Exact Position Title

(12)mo/11mo/10mo/hrly
Work year length(circle)

Fiscal Year: 06-07 07-08 08-09
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:		# 1	Average Time in Minutes
Code 21	Preparing for the evaluation		20
Code 22	Meeting(s) with the employee		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 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 Mary Kuhn Date 9-30-09

If you have any questions, please contact Mary Kuhn at 760-331-5026

PLEASE SUBMIT THIS INFORMATION BY _____ TO _____

Mary Kuhn
9-30-09

Employee AVERAGE Time Record for Mandated Costs
 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 District/COE
Torrie Norton Employee Name
160-331-5025 Telephone #
Personnel Department/Location
Asst. Supt Exact Position Title
12mo/11mo/10mo/hrly Work year length(circle)
 Fiscal Year: 06-07 07-08 08-09
 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	2	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 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 Mary Kuhn Date 9-30-09
 If you have any questions, please contact Mary Kuhn at 760-331-5026
 PLEASE SUBMIT THIS INFORMATION BY _____ TO _____

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Employee AVERAGE Time Record for Mandated Costs

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.

<u>CUSD</u>	<u>Personnel</u>
District/COE	Department/Location
<u>Torrie Norton</u>	<u>Asst. Supt. Personnel</u>
Employee Name	Exact Position Title
<u>760-331-5000</u>	Fiscal Year: 06-07 07-08 08-09
Telephone #	Circle the years for which you are responding.
<u>(12mo/11mo/10mo/hrly)</u>	
Work year length(circle)	

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:	#3	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		—
Code 24 Reducing the evaluation to writing		20
Code 25 Post-evaluation conference(s) with the employee		—
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 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 Mary Kuhn Date 9-30-09

If you have any questions, please contact Mary Kuhn at 760-331-5026

PLEASE 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 CUSD Fiscal Year: 2008 - 09
Learning Keys - Data Walkers AOMS
 Type of Training Activity Training Location
October 2008 8⁰⁰ - 9⁰⁰ a.m.
 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 <u>David Kalk</u>	<u>Asst. Principal</u>	<u>AOMS</u>	Trainer <input checked="" type="radio"/> Trainee
2 <u>KALK</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 attach copy of agenda and materials:

The 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

Employee Signature [Signature] Date 9/28/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Call Dave

SA 1.7 - 3

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

District/COE Carlsbad USD Fiscal Year: 08-09
Learning Keys - Data Walks ADMS
Type of Training Activity Training Location
Oct. 2008 8-9^{am}
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 Dave Kalk	Asst. Principal	ADMS	Trainer <u>Trainee</u>
2 Carolyn Millikin	Principal	ADMS	<u>Trainer</u> 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 attach copy of agenda and materials:

Work together to develop common understanding of expectations during Data Walks.

The 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

Employee Signature Carolyn Millikin Date 9-28-09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE CUED Fiscal Year: 08/09
EVALUATIONS
 Type of Training Activity Sept. 2008 Training Location CHS
 Date of Activity _____ Start and End Times 1:00 - 2:30

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Tom Bloomquist	ASST PRIN	CHS	Trainer <u>Trainee</u>
2 Marlene Gironi	" "	CHS	Trainer <u>Trainee</u>
3 Bill Lord	" "	CHS	Trainer <u>Trainee</u>
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 attach copy of agenda and materials:

The 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

Employee Signature [Signature] Date 9/24/09

If you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

District/COE COSD

Fiscal Year: 08-09

Type of Training Activity Certificated Eval Process

Training Location DO/VMS

Date of Activity 8-11-09

Start and End Times 8:00am

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 <u>Josias Morales</u>	<u>Principal</u>	<u>VMS</u>	Trainer <u>Trainee</u>
2 <u>JASON MORALES</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 attach copy of agenda and materials:

The 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

Employee Signature [Signature] Date 10/1/09

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

SixTen and Associates
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	08-09
	AVERAGE ACCOUNTING TECHNICIAN	\$ 29.02	\$ 28.50
	AVERAGE ADMINISTRATIVE ASSISTANT	\$ 30.95	\$ 30.66
	AVERAGE ADMINISTRATOR (Principal/Vice Principal)	\$ 67.72	\$ 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	\$ 24.45
	AVERAGE HEALTH TECH	\$ 26.31	\$ 25.48
	AVERAGE INSTRUCTIONAL AIDE	\$ 22.76	\$ 22.35
	AVERAGE OFFICE ASSISTANT	\$ 22.06	\$ 20.47
	AVERAGE PRINCIPAL	\$ 71.89	\$ 75.09
	AVERAGE PSYCHOLOGIST		

PRODUCTIVE HOURLY RATE UPDATE

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	08-09
	AVERAGE ACCOUNTING TECHNICIAN	\$ 29.02	\$ 24.79
	AVERAGE ADMINISTRATIVE ASSISTANT	\$ 30.95	\$ 25.06
	AVERAGE ADMINISTRATOR (Principal/Vice Principal)	\$ 67.72	\$ 83.07
	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
	AVERAGE COUNSELOR	\$ 56.08	\$ 47.21
	AVERAGE DIRECTOR	\$ 72.51	\$ 68.49
	AVERAGE GUIDANCE TECH	\$ 24.66	\$ 20.12
	AVERAGE HEALTH TECH	\$ 26.31	\$ 20.12
	AVERAGE INSTRUCTIONAL AIDE	\$ 22.76	\$ 20.12
	AVERAGE OFFICE ASSISTANT	\$ 22.06	\$ 17.34
	AVERAGE PRINCIPAL	\$ 71.89	\$ 76.01
	AVERAGE PSYCHOLOGIST	\$	\$ 47.21

MONTHLY REIMBURSEMENT SERVICES

Name	Title	07-08	08-09
	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	\$ 67.39
ADAMS, GWEN	TEACHER	\$ 65.81	\$ 70.88
AGRAMONTE, DENISE	ADMINISTRATIVE ASSISTANT		\$ 33.27
AHLE, STEPHEN	PRINCIPAL (POINSETTIA)	\$ 71.23	\$ 79.28
ARMSTRONG, THERESA (TRESSIE)	ASSISTANT PRINCIPAL (KELLY ELEM)	\$ 60.76	\$ 69.59
ASHTON, BRIAN	COUNSELOR	\$ 60.09	\$ 64.72
BAIMA, LANE	PHYSICAL PERFORMANCE TEST COORDINATOR (TEACHER)	\$ 35.60	\$ 40.46
BATALLA, LILITTE	ACCOUNTANT		\$ 34.70
BEESON, JULIE	CAMPUS SUPERVISOR	\$ 19.14	\$ 19.74
BLOOMQUIST, THOMAS	ASSISTANT PRINCIPAL	\$ 69.93	\$ 75.31
BOLING, JEAN MARIE	ADMINISTRATIVE SECRETARY	\$ 37.05	\$ 36.39
BOSS, VICTORIA	LIBRARY TECHNICIAN	\$ 25.68	\$ 25.23
CAMPBELL LAHR, BETTY J	SPECIAL PROJECTS COORDINATOR-RETIRED 7/1/07	RETIRED	
CARTAGENA, RUTH	ADMINISTRATIVE ASSISTANT		\$ 27.12

SixTen and Associates

MANDATE REIMBURSEMENT SERVICES

Name	Title	07-08	08-09
DURHAM, ELLEN	ADMINISTRATIVE ASSISTANT	\$ 54.49	\$ 53.51
FLANAGAN, MELODY	ATTENDANCE CLERK	\$ 22.72	\$ 22.31
FORNELLI, LINDA	NURSE	\$ 32.95	\$ 47.56
FREEMAN, WALTER	ASSISTANT SUPERINTENDENT, BUSINESS SERVICES		\$ 117.07
GARCIA, ALICE	ADMINISTRATIVE SECRETARY	\$ 27.66	\$ 27.16
GEARING, HEATHER	ADMINISTRATIVE ASSISTANT	\$ 27.00	\$ 26.52
GEARING, LINDA	ACCOUNTING TECHNICIAN	\$ 28.33	\$ 27.83
GIORDANI, MARJORIE	ASSISTANT PRINCIPAL		\$ 67.98
GLENN, SUSAN	ADMINISTRATIVE SECRETARY-RETIRED 5/31/07	RETIRED	RETIRED
GOELTZ, KATHY	PSYCHOLOGIST	\$ 52.20	\$ 26.22
GUNZELMAN, CATHY	OFFICE ASSISTANT-SPLIT ASSIGNMENT 08/09	\$ 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	\$ 27.66	\$ 27.16
HANSEN, ROSE MARIE	ATTENDANCE CLERK	\$ 22.72	\$ 22.31
JONES HARDEN, LESLIE	PRINCIPAL		\$ 75.50
HARPER, DONNA	DIRECTOR, PURCHASING & STRS	\$ 64.58	\$ 63.42
HARTMAN, JANE	COORDINATOR OF SPECIAL PROGRAMS08/09	\$ 62.78	\$ 64.37
HETRICK, LINDY	ADMINISTRATIVE ASSISTANT	\$ 29.04	\$ 29.96

MONTHLY REIMBURSEMENT SERVICES

Name	Title	07-08	08-09
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	\$ 24.03
KUHN, MARY	ADMINISTRATIVE SECRETARY-CONFIDENTIAL	\$ 33.88	\$ 33.27
LANE, KIM	HEALTH TECHNICIAN	\$ 28.32	\$ 27.82
LARSON, JENNIFER	HEALTH TECHNICIAN	\$ 28.32	\$ 27.82
LARSON, LESLIE	HEALTH TECHNICIAN	\$ 24.46	\$ 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	\$ 24.03
MADDOX, SHEILA	PRINCIPAL-RETIRED 6/30/07		RETIRED
MARTINEZ, PAUL	MAINTENANCE WORKER	\$ 38.93	\$ 40.14

MONTHLY REIMBURSEMENT SERVICES

Name	Title	07-08	08-09
McCORMAC, KATHRYN	LEAD ACCOUNTANT	\$ 41.30	\$ 42.59
McCORMICK, LAURA JEAN	OFFICE ASSISTANT	\$ 24.38	\$ 23.94
McKEE, CAROL	COUNSELOR RETIRED-SPECIAL ASSIGNMENT BY STIPEND		STIPEND
MERCHANT, SHARAN	IS SPECIALIST	\$ 38.93	\$ 38.23
MILLIKIN, CAROLYN	PRINCIPAL (VALLEY MIDDLE)	\$ 73.61	\$ 79.28
MIRANDA, DOLORES	ATTENDANCE CLERK		\$ 22.31
MONDERINE, ROSEMARY	SENIOR BUYER	\$ 38.00	\$ 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	\$ 90.99	\$ 111.93
O'CONNELL, SUZANNE	ASSISTANT SUPERINTENDENT- INSTRUCTIONAL	\$ 90.99	\$ 111.93
OGAN, LAURA	ATTENDANCE CLERK	\$ 22.72	\$ 23.43
OHLIN, EVANGELINE (VANGIE)	ADMINISTRATIVE SECRETARY	\$ 23.89	\$ 24.65
PARKER, RACHEL	COUNSELOR	\$ 42.55	\$ 67.94
PFRANG, SHARON	OFFICE ASSISTANT-LEFT DISTRICT 6/30/07		LD
PIERCE, ROBERT	TEACHER	\$ 59.75	\$ 67.61
PINNER, ROBIN	ADMINISTRATIVE ASSISTANT	\$ 25.09	\$ 25.87
PRICE, JULIE	OFFICE ASSISTANT	\$ 21.09	\$ 20.72
PULASKI, LINDA	ATTENDANCE CLERK	\$ 26.31	\$ 25.83

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 = County
D = District

CA= Common Administration
J = Joint Powers Agency

				----- APPROVED RATES -----				
				For use with state and federal programs, as allowable, in:				
County Code	LEA Code	Type**	LEA Name	2004-05 <small>(based on 2002-03 expenditure data)</small>	2005-06 <small>(based on 2003-04 expenditure data)</small>	2006-07 <small>(based on 2004-05 expenditure data)</small>	2007-08 <small>(based on 2005-06 expenditure data)</small>	2008-09 <small>(based on 2006-07 expenditure data)</small>
37	10371	C	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 Elementary	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	D	Santee Elementary	5.14%	7.06%	6.98%	6.46%	7.44%
37	68379	D	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	D	Carlsbad Unified	5.73%	5.83%	6.48%	4.84%	6.18%
37	73569	D	Oceanside Unified	4.53%	4.44%	4.32%	3.21%	2.84%
37	73791	D	San Marcos Unified	4.07%	3.16%	3.74%	3.78%	3.61%
37	75416	D	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

183

Six ten 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

Sacramento
3841 North Freeway Blvd., Suite 170
Sacramento, CA 95834
Telephone: (916) 565-6104
Fax: (916) 564-6103

Claim File Copy

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

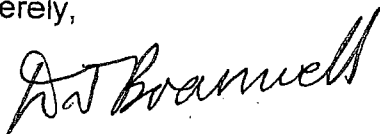
Dear Ms. Brummels:

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

CLAIM FOR PAYMENT
Pursuant to Government Code Section 17561
THE STULL ACT

For State Controller Use Only
(19) Program Number 00260
(20) Date Filed / /
(21) LRS Input / /

Program
260

(01) Claimant Identification Number:		S37030		Reimbursement Claim Data		
(02) Claimant Name		Carlsbad Unified School District		(22) SA-1, (03)(A)(f)	340	
County of Location		San Diego		(23) SA-1, (03)(B)(f)		
Street Address		6225 El Camino Real		(24) SA-1, (03)(A)(1)(a)(f)	37,021	
City	State	Zip Code		(25) SA-1, (03)(A)(1)(b)(f)	51,546	
Carlsbad	CA	92009		(26) SA-1, (03)(A)(2)(a)(f)	17,635	
Type of Claim	Estimated Claim		Reimbursement Claim		(27) SA-1, (03)(A)(2)(b)(f)	23,999
	(03) Estimated	<input type="checkbox"/>	(09) Reimbursement	<input checked="" type="checkbox"/>	(28) SA-1, (03)(B)(1)(a)(f)	
	(04) Combined	<input type="checkbox"/>	(10) Combined	<input type="checkbox"/>	(29) SA-1, (03)(B)(1)(b)(f)	
	(05) Amended	<input type="checkbox"/>	(11) Amended	<input type="checkbox"/>		
Fiscal Year of cost	(06)	(12)	2007-2008		(30) SA-1, (03)(B)(1)(c)(f)	
Total Claimed Amount	(07)	(13)	\$ 136,502		(31) SA-1, (03)(B)(1)(d)(f)	
Less: 10% Late Penalty		(14)	\$ -		(32) SA-1, (03)(B)(1)(e)(f)	
Less: Prior Claim Payment Received		(15)	\$ -		(33) SA-1, (05)	5
Net Claimed Amount		(16)	\$ 136,502		(34) SA-1, (06)	6,302
Due from State	(08)	(17)	\$ 136,502		(35) SA-1, (08)	
Due to State		(18)			(36) SA-1, (09)	

(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)

Walter Freeman

Date

2/10/09

Walter Freeman

Assistant Superintendent, Business Services

Type or Print Name

Title

(38) Name of Contact Person for Claim

SixTen and Associates

Telephone Number: (858) 514-8605

E-mail Address: kbpsixten@aol.com

Program 260	MANDATED COSTS THE STULL ACT CLAIM SUMMARY	FORM SA-1
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(1) () Int: Arilsbad Unified School District	(02) Type of Claim Reimbursement <input checked="" type="checkbox"/> X Estimated <input type="checkbox"/>	Fiscal Year 2007-2008
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Direct Costs	Object Accounts					
(3) Reimbursable Components	(a) Salaries and Benefits	(b) Materials and Supplies	(c) Contract Services	(d) Fixed Assets	(e) Travel and Training	(f) Total
Certificated Instructional Employees (CIE)	Claim Statistics: Number of CIE's evaluated per (03)(A)(1) and (03)(A)(2)					340
1. Evaluate and assess performance	Ed. Code §44662, subd. (b), as amended by Ch. 498/83; Reimbursement period begins fy 1997-98					
a. Review employee's techniques and strategies	\$ 37,020.57	\$ -	\$ -	\$ -	\$ -	\$ 37,020.57
b. Evaluation to include assessment of techniques and strategies	\$ 51,546.35	\$ -	\$ -	\$ -	\$ -	\$ 51,546.35
2. Evaluate and assess CIE who teach certain subjects	Ed. Code §44662, subd. (b), as amended by Ch. 4/99; Reimbursement period begins 03/15/99					
a. Review STAR results	\$ 17,635.01	\$ -	\$ -	\$ -	\$ -	\$ 17,635.01
Assessment based on STAR results	\$ 23,998.59	\$ -	\$ -	\$ -	\$ -	\$ 23,998.59
CIE and NIE Employees	Claim Statistics: Number of CIE's and NIE's evaluated per (03)(B)(1)					
Evaluate and assess CIE and NIE employees	Ed. Code §44664, subd. (b), as amended by Ch. 498/83; Reimbursement period begins fy 1997-98					
a. Evaluating and assessing CIE according to certain criteria	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
b. Reducing evaluation to writing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
c. Transmitting evaluation to CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
d. Attaching response to personnel file	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
e. Discussing evaluation with CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
1 Total Direct Costs	\$ 130,200.52	\$ -	\$ -	\$ -	\$ -	\$ 130,200.52
Indirect Costs						
Indirect Cost Rate	[From J-380 or J-580]					4.84%
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
Cost Reduction						
Setting Savings						\$ -
Less: Other Reimbursements						\$ -
Total Claimed Amount	[Line (07) - (Line (08) + Line (09))]					\$ 136,502.23

<div style="border: 1px solid black; padding: 2px;"> Program 260 </div>	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM SA-2
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(01) Claimant Arlsbad Unified School District	(02) Fiscal Year 2007-2008
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE <input checked="" type="checkbox"/> Review employee's techniques and strategies <input type="checkbox"/> Review STR Results	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies <input type="checkbox"/> Assessment based on STR results
B. CIE & NIE <input type="checkbox"/> Evaluating and assessing CIE according to certain criteria <input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Reducing evaluation to writing <input type="checkbox"/> Discussing evaluation with CIE <input type="checkbox"/> Transmitting evaluation to CIE

(04) Description of Expenses	Object Accounts						
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Preparing to evaluate and assess the performance of a CIE Administrators Various	\$69.32	191.7	\$ 13,288.64				
Discussing the CIE's goals and objectives Administrators Various	\$69.32	180.6	\$ 12,519.19				
Pre-observation conference and discussion with CIE Administrators Various	\$69.32	138.1	\$ 9,573.09				
Attendance at training required to perform evaluations							
Armstrong, Theresa Principal	\$60.76	1.5	\$ 91.14				
Bloomquist, Tom Assistant Principal	\$69.93	3.5	\$ 244.76				
Giordani, Marjorie Assistant Principal	\$63.55	3.5	\$ 222.43				
Hancock, Catina Principal	\$65.93	1.5	\$ 98.90				
Howard, Tina Assistant Principal	\$63.55	1.5	\$ 95.33				
Huesing, Kimberly Ann Principal	\$71.89	1.5	\$ 107.84				
Kalk, Dave Assistant Principal	\$58.15	1.5	\$ 87.23				
Lord, Bill Assistant Principal	\$66.60	3.5	\$ 233.10				
Lund, Chad Assistant Principal	\$63.55	1.5	\$ 95.33				
Morales, Julio Cesar Assistant Principal	\$58.15	1.5	\$ 87.23				
Sester, Phyllis Admin Assistant	\$27.66	2.0	\$ 55.32				
Sims, Cynthia Admin Assistant	\$27.66	2.0	\$ 55.32				
Smith, Emily Admin Assistant	\$26.34	2.0	\$ 52.68				
Training staff that will be performing the evaluations Vodicka, Devin Director	\$75.36	1.5	\$ 113.04				

(00)	Total	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	Page 1 of 1	\$ 37,020.57	\$ -	\$ -	\$ -	\$ -
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Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM SA-2
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(01) Claimant Wrlsbad Unified School District	(02) Fiscal Year 2007-2008
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE	<input type="checkbox"/>	Review employee's techniques and strategies	<input checked="" type="checkbox"/>	Evaluation to include assessment of techniques and strategies
	<input type="checkbox"/>	Review STR Results	<input type="checkbox"/>	Assessment based on STR results

B. CIE & NIE	<input type="checkbox"/>	Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/>	Reducing evaluation to writing	<input type="checkbox"/>	<input type="checkbox"/>	Transmitting evaluation to CIE
	<input type="checkbox"/>	Attaching response to personnel file	<input type="checkbox"/>	Discussing evaluation with CIE			

(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	Object Accounts				
			(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and 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	\$ 13,101.48				
Discussing evaluation and write-up with CIE Administrators Various	\$69.32	204.2	\$ 14,155.14				
Reducing evaluation to writing, forward to personnel file Administrators Various	\$69.32	80.0	\$ 5,545.60				
Total <input checked="" type="checkbox"/>			\$ 51,546.35	\$ -	\$ -	\$ -	\$ -
Subtotal <input type="checkbox"/>							

**MANDATED COSTS
THE STULL ACT
COMPONENT/ACTIVITY COST DETAIL**

Program
260

FORM
SA-2

(01) Claimant: **Madison Unified School District** (02) Fiscal-Year: **2007-2008**

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE

Review employee's techniques and strategies Evaluation to include assessment of techniques and strategies

Review STR Results Assessment based on STR results

B. CIE & NIE

Evaluating and assessing CIE according to certain criteria Reducing evaluation to writing Transmitting evaluation to CIE

Attaching response to personnel file Discussing evaluation with CIE

(04) Description of Expenses			Object Accounts				
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Preparing to evaluate and assess the performance of a CIE Administrators Various	\$69.32	90.4	\$ 6,266.53				
Discussing the CIE's goals and objectives Administrators Various	\$69.32	92.0	\$ 6,377.44				
Pre-observation conference and discussion with CIE Administrators Various	\$69.32	72.0	\$ 4,991.04				
Total <input checked="" type="checkbox"/>			\$ 17,635.01	\$ -	\$ -	\$ -	\$ -
Subtotal <input type="checkbox"/>							

**MANDATED COSTS
THE STULL ACT
COMPONENT/ACTIVITY COST DETAIL**

FORM SA-2

(01) Claimant: **Parisbad Unified School District** (02) Fiscal Year: **2007-2008**

(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

A. CIE

Review employee's techniques and strategies Evaluation to include assessment of techniques and strategies

Review STR Results Assessment based on STR results

B. CIE & NIE

Evaluating and assessing CIE according to certain criteria Reducing evaluation to writing Transmitting evaluation to CIE

Attaching response to personnel file Discussing evaluation with CIE

(04) Description of Expenses

(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	Object Accounts				
			(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Classroom observation to evaluate and assess performance Administrators Various	\$69.32	121.5	\$ 8,422.38				
Post-observation conference and discussion with CIE Administrators Various	\$69.32	110.3	\$ 7,646.00				
Discussing evaluation and write-up with CIE Administrators Various	\$69.32	114.4	\$ 7,930.21				

Total Subtotal Page 1 of 1 \$ 23,998.59 \$ - \$ - \$ - \$ -

Carlsbad Unified School District
 498/83 THE STULL ACT
 2007-2008
 Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
07-08	90.40	Administrators	Various	\$69.32	\$6,266.53	Preparing to evaluate and assess the performance of a CIE	Review STAR results
07-08	92.00	Administrators	Various	\$69.32	\$6,377.44	Discussing the CIE's goals and objectives	Review STAR results
07-08	72.00	Administrators	Various	\$69.32	\$4,991.04	Pre-observation conference and discussion with CIE	Review STAR results
07-08	121.50	Administrators	Various	\$69.32	\$8,422.38	Classroom observation to evaluate and assess performance	Assessment based on STAR results
07-08	110.30	Administrators	Various	\$69.32	\$7,646.00	Post-observation conference and discussion with CIE	Assessment based on STAR results
07-08	114.40	Administrators	Various	\$69.32	\$7,930.21	Post-observation conference and discussion with CIE	Assessment based on STAR results
07-08	191.70	Administrators	Various	\$69.32	\$13,288.64	Preparing to evaluate and assess the performance of a CIE	Review employee's techniques and strate
07-08	180.60	Administrators	Various	\$69.32	\$12,519.19	Discussing the CIE's goals and objectives	Review employee's techniques and strate
07-08	138.10	Administrators	Various	\$69.32	\$9,573.09	Pre-observation conference and discussion with CIE	Review employee's techniques and strate
07-08	270.40	Administrators	Various	\$69.32	\$18,744.13	Classroom observation to evaluate and assess performance	Evaluation to include assessment of tech
07-08	189.00	Administrators	Various	\$69.32	\$13,101.48	Post-observation conference and discussion with CIE	Evaluation to include assessment of tech
07-08	204.20	Administrators	Various	\$69.32	\$14,155.14	Discussing evaluation and write-up with CIE	Evaluation to include assessment of tech
07-08	80.00	Administrators	Various	\$69.32	\$5,545.60	Reducing evaluation to writing, forward to personnel file	Evaluation to include assessment of tech
	1,854.60	Administrators Total			\$128,560.87		
07-08	1.50	Armstrong, Theresa	Principal	\$60.76	\$91.14	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Armstrong, Theresa Total			\$91.14		
07-08	2.00	Bloomquist, Tom	Assistant Principal	\$69.93	\$139.86	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Bloomquist, Tom	Assistant Principal	\$69.93	\$104.90	Attendance at training required to perform evaluations	Review employee's techniques and strate
	3.50	Bloomquist, Tom Total			\$244.76		
07-08	2.00	Giordani, Marjorie	Assistant Principal	\$63.55	\$127.10	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Giordani, Marjorie	Assistant Principal	\$63.55	\$95.33	Attendance at training required to perform evaluations	Review employee's techniques and strate
	3.50	Giordani, Marjorie Total			\$222.43		
07-08	1.50	Hancock, Catina	Principal	\$65.93	\$98.90	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Hancock, Catina Total			\$98.90		
07-08	1.50	Howard, Tina	Assistant Principal	\$63.55	\$95.33	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Howard, Tina Total			\$95.33		
07-08	1.50	Huesing, Kimberly Ann	Principal	\$71.89	\$107.84	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Huesing, Kimberly Ann Total			\$107.84		
07-08	1.50	Kalk, Dave	Assistant Principal	\$58.15	\$87.23	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Kalk, Dave Total			\$87.23		
07-08	2.00	Lord, Bill	Assistant Principal	\$66.60	\$133.20	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Lord, Bill	Assistant Principal	\$66.60	\$99.90	Attendance at training required to perform evaluations	Review employee's techniques and strate
	3.50	Lord, Bill Total			\$233.10		
07-08	1.50	Lund, Chad	Assistant Principal	\$63.55	\$95.33	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Lund, Chad Total			\$95.33		
07-08	1.50	Morales, Julio Cesar	Assistant Principal	\$58.15	\$87.23	Attendance at training required to perform evaluations	Review employee's techniques and strate
07-08	1.50	Morales, Julio Cesar Total			\$87.23		
07-08	2.00	Sester, Phyllis	Admin Assistant	\$27.66	\$55.32	Attendance at training required to perform evaluations	Review employee's techniques and strate
	2.00	Sester, Phyllis Total			\$55.32		

Carlsbad Unified of District
 498/83 THE STULL ACT
 2007-2008

Sort by Name

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
07-08	2.00	Sims, Cynthia	Admin Assistant	\$27.66	\$55.32	Attendance at training required to perform evaluations	Review employee's techniques and strate
	2.00	Sims, Cynthia Total			\$55.32		
07-08	2.00	Smith, Emily	Admin Assistant	\$26.34	\$52.68	Attendance at training required to perform evaluations	Review employee's techniques and strate
	2.00	Smith, Emily Total			\$52.68		
07-08	1.50	Vodicka, Devin	Director	\$75.36	\$113.04	Training staff that will be performing the evaluations	Review employee's techniques and strate
	1.50	Vodicka, Devin Total			\$113.04		
	1,883.10	Grand Total			\$130,200.52		

Combined Schedule 1
 Carlsbad Unified School District
 Stull Act 498/83
 Temporary, 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
 Temporary, 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
	<u>90.4</u>	<u>191.7</u>
Code 12		
Temporary	7.3	15.0
Probationary	24.8	53.1
Permanent	60.0	112.5
	<u>92.0</u>	<u>180.6</u>
Code 13		
Temporary	5.8	12.5
Probationary	15.6	31.9
Permanent	50.6	93.8
	<u>72.0</u>	<u>138.1</u>
Code 14		
Temporary	8.8	23.8
Probationary	28.3	77.9
Permanent	84.4	168.8
	<u>121.5</u>	<u>270.4</u>
Code 15		
Temporary	7.0	17.5
Probationary	28.3	49.6
Permanent	75.0	121.9
	<u>110.3</u>	<u>189.0</u>
Code 16		
Temporary	7.5	16.3
Probationary	31.9	56.7
Permanent	75.0	131.3
	<u>114.4</u>	<u>204.2</u>
Code 17		
Temporary		6.0
Probationary		17.7
Permanent		56.3
		<u>80.0</u>

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

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

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 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
- 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

Activities	2006-2007		2007-2008		Average	
	A	B&C	A	B&C	A	B&C
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
CODE 17		15.0		9.0		12.0

Conclusion: Findings to go forward to Schedule 1A

Activities

- Code 11- Preparing for the evaluation (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
- Code 15- Post-observation conference with instructor
- Code 16- Final conference with instructor
- Code 17- District reporting

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

Schoolsite	Staff	*Activity Codes														
		11			12			13			14					
		A	B	C	A	B	C	A	B	C	A	B	C	D		
Aviara Oaks Elementary	Kimberly Ann Huesing	55	25	25	55	30	30	30	30	30	55	30	30	**180	30	30
Aviara Oaks Middle	Carolyn Millikin		20	20	10	10	10	10	10	10		10	10		15	15
Buena Vista	Tina Howard	60	30		60						30	30		**240	**120	**120
Calavera Hills Elementary	Leslie Harden	10			15	15						5	5	5	15	10
Calavera Hills Middle	Catina Hancock	40	40	40	5	5	5	5	5	5	5	5	5	45	45	45
Carlsbad Valley Academy	Keith Holley	15	15		15	15					15			60	60	60
Carlsbad High School	Bill Lord	15			15						15			**120		
	Marjorie Giordani	15			15						15			4		
	Tom Bloomquist	10			10						10			**240		
Hope	Rich Tubbs	10			10	10	10	5	10	10	5	10	10	5	15	10
Jefferson	Carol Van Vooren	15			10	10	5	5	2	2	2	2	2	2	10	10
Kelly	Theresa Armstrong	10	10	10	10	10	10	10	5	5	5	5	5	10	10	10
Pacific Rim	Robert Devich							60							30	30
Poinsetta	Steve Ahle	13	13	13	18	18	18	18	18	18	18	18	18	9	9	9
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	18	16	13	11	14	17	22
Summation of criteria B and C		42	40	40	27	25	25	23	23	23	15	20	20	15	44	44
Averages to be used		20	40	40	15	25	25	15	20	20	15	20	20	15	40	40

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

- (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

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

Schoolsite	Staff	*Activity Codes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Elementary	Kimberly Ann Huesing	**180	30	30	30	**180	30	30	30	**180	30	30	30
Aviara Oaks Middle	Carolyn Millikin		10	10	10		10	10	10		2	2	2
Buena Vista	Tina Howard	30	60			**120	60	30	30	**120	**120	**120	**120
Calavera Hills Elementary	Leslie Harden	5	10	10	5	5	10	10	5		30		
Calavera Hills Middle	Catrina Hancock	20	20	20	20	40	40	40	40	10	10	10	10
Carlsbad Valley Academy	Keith Holley	40	40	40		20	20	20		15			
Carlsbad High School	Bill Lord	30				30							
	Marjorie Giordani	30				30							
	Tom Bloomquist	40				20							
Hope	Rich Tubbs	5	10	10	10	10	10	10	10	5	5	5	5
Jefferson	Carol Van Vooren	2	10	5	10	10	10	10	10	5	5	5	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	9	9	9	9					1	1	1	1
Valley	Julio Cesar Morales	12	12	12	12	18	12	12	12				
Averages		19	20	16	15	19	21	18	19	7	11	8	8
Summation of criteria B and C		36				39				9			
Averages to be used		15				15				9			

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) 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.

Carlsbad USD
District/COE

AOE
Department/Location

Kimberly Ann Huesing
Employee Name

Principal
Exact Position Title

760-331-6000 Telephone # 12mo/11mo/10mo/hrly Work year length (circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
	A	B	C	D
Code 11 Preparing for the evaluation	55	25	25	25
Code 12 Goals and objectives conference with instructor	55	30	30	30
Code 13 Pre-observation conference with instructor	55	30	30	30
Code 14 Classroom observation of instructor	180	30	30	30
Code 15 Post-observation conference with instructor	180	30	30	30
Code 16 Final conference with instructor	180	30	30	30
Code 17 District Reporting	180	30	30	30

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 Kimberly Ann Huesing Date 10/13/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

Calsbad unified
 District/COE
Carolyn Millikin
 Employee Name

Aviara Oaks middle
 Department/Location
Principal
 Exact Position Title

331-6100 Telephone #
12mo/11mo/10mo/hry Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

- 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
 - 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation		20	20	20
Code 12	Goals and objectives conference with instructor	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 instructor		10	10	10
Code 16	Final conference with instructor		10	10	10
Code 17	District Reporting		2	2	2

*9 temporary teachers in 07/08
 0 probs
 4 days each year*

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 [Signature] Date 10-13-08

If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

Routine Evaluations of Instructors - TEMPORARY (1)

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

CARLSBAD UNIFIED
 District/COE

BUENA VISTA
 Department/Location

TINA HOWARD
 Employee Name

PRINCIPAL
 Exact Position Title

(760) 331-5400 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
		A	B	C	D
Code 11	Preparing for the evaluation	1.0	.5		
Code 12	Goals and objectives conference with instructor	1.0			
Code 13	Pre-observation conference with instructor	.5	.5		
Code 14	Classroom observation of instructor	4	2	2	2
Code 15	Post-observation conference with instructor	.5	1.0		
Code 16	Final conference with instructor	2	1	.5	.5
Code 17	District Reporting	2	2	2	2

Assume all times were in hours

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 *Tina Howard* Date 10/6/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CUSD
 District/COE
L Harder
 Employee Name
3316300
 Telephone #

CHIE
 Department/Location
Principal
 Exact Position Title
 Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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				
		A	B	C	D	
Code 11	Preparing for the evaluation	10 min	-	10	-	-
Code 12	Goals and objectives conference with instructor	30 min	15	15	-	-
Code 13	Pre-observation conference with instructor	10 min	-	5	5	-
Code 14	Classroom observation of instructor	45 min	5	15	15	10
Code 15	Post-observation conference with instructor	30 min	5	10	10	5
Code 16	Final conference with instructor	30 min	5	10	10	5
Code 17	District Reporting	30 min	-	30	-	-

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 L Harder Date 11/19/08

If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

Carlsbad
 District/COE

CHMS
 Department/Location

Cathryn Hancock
 Employee Name

Principal
 Exact Position Title

331-4400 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	40	40	40	40
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	45	45	45	45
Code 15	Post-observation conference with instructor	20	20	20	20
Code 16	Final conference with instructor	40	40	40	40
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 your personal knowledge or information." This information is used for cost accounting purposes only. **PLEASE USE BLUE INK**

Employee Signature [Signature] Date 10/16/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CUSD
District/COE

CVA
Department/Location

Keith Holley
Employee Name

Administrative Secretary
Exact Position Title

331-5200 12mo/11mo/10mo/hrly
Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	15	15		
Code 12	Goals and objectives conference with instructor	15	15		
Code 13	Pre-observation conference with instructor	15			
Code 14	Classroom observation of instructor	60	60	60	60
Code 15	Post-observation conference with instructor	40	40	40	
Code 16	Final conference with instructor	20	20	20	
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 on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature Keith Holley Date 10-15-08

If you have any questions, please contact Keith Holley at 331-5200

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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.

CUSD
District/COE

Adm/CHS
Department/Location

Bill Lord
Employee Name

Assist Principal
Exact Position Title

(760) 3315197 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	120			
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 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 10/9/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

Carlsbad Unified
 District/COE

CHS/ Administration
 Department/Location

Marjorie Givdani
 Employee Name

Assistant Principal
 Exact Position Title

(760) 331-5196 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

- | | |
|---|---|
| <p>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
 Code 17 District reporting</p> | <p>Evaluation Criteria:
 (A) district standards and test results
 (B) instructional techniques/strategies
 (C) adherence to curricular objectives
 (D) suitable learning environment</p> |
|---|---|

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			
	A	B	C	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 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 M. Givdani Date 10/3/2008

If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CUSD
District/COE

CHS / Admin.
Department/Location

Tom Bloomquist
Employee Name

Assistant Principal
Exact Position Title

331-5198 Telephone #
12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation		10 minutes		
Code 12	Goals and objectives conference with instructor		10 minutes		
Code 13	Pre-observation conference with instructor		10 minutes		
Code 14	Classroom observation of instructor		4 hours		
Code 15	Post-observation conference with instructor		20 minutes		
Code 16	Final conference with instructor		20 minutes		
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 [Signature] Date 10/2/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

Carlsbad
 District/COE

HOPE
 Department/Location

Rich Tubbs
 Employee Name

Principal
 Exact Position Title

331 5900 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	10			
Code 12 Goals and objectives conference with instructor	10	10	10	5
Code 13 Pre-observation conference with instructor	5	10	10	10
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	10	10	10	10
Code 17 District Reporting	5	5	5	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 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 Richard Tubbs Date 9-24-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

Carlsbad
District/COE

Jefferson
Department/Location

Carol Van Nooren
Employee Name

Principal
Exact Position Title

(760) 331-5599 (12mo/11mo/10mo/hrly)
Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	5	10
Code 16	Final conference with instructor	10	10	10	10
Code 17	District Reporting	5	5	5	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 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 Carol Van Nooren Date 10/20/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CUSD District/COE Bellevue Department/Location
J. Amador Employee Name Principal Exact Position Title
960 331 5800 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)
 Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

- | | |
|--|--|
| 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
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 |
|--|--|

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	10	10	10
Code 12	Goals and objectives conference with instructor	10	10	10	10
Code 13	Pre-observation conference with instructor	5	5	5	5
Code 14	Classroom observation of instructor	10	10	10	10
Code 15	Post-observation conference with instructor	10	10	10	10
Code 16	Final conference with instructor	10	10	10	10
Code 17	District Reporting	5	5	5	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 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 J. Amador Date 9/24/08
 If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

PUSD
 District/COE

Pacific Rim
 Department/Location

Robert Deutch
 Employee Name

Principal
 Exact Position Title

331-6200 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
		A	B	C	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
<u>Code 14</u>	Classroom observation of instructor				30
<u>Code 15</u>	Post-observation conference with instructor				30
<u>Code 16</u>	Final conference with instructor				30
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 [Signature] Date 10-16-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

SA 1.7b

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

Stull
 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.

Carlsbad
 District/COE

Poinsettia
 Department/Location

Steve Ahle
 Employee Name

Principal
 Exact Position Title

33/6500
 Telephone #

12mo/11mo/10mo/hry
 Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

Employee turned in
 1. Permanent
 2. Probationary
 Both Probationary had diff. time -
 Higher Prob. Sch. & Probationary
 Lower Prob. Sch. & Probationary
 Sch.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	13	13	13	13
Code 12 Goals and objectives conference with instructor	18	18	18	18
Code 13 Pre-observation conference with instructor	18	18	18	18
Code 14 Classroom observation of instructor	9	9	9	9
Code 15 Post-observation conference with instructor	9	9	9	9
Code 16 Final conference with instructor				
Code 17 District Reporting	1	2	1	1

copied from permanent - he is doubling = 18 min

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 [Signature] Date 11-4-08

If you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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.

District/COE Carlsbad USD

Department/Location Valley MS

Employee Name J. Cesar Morales

Exact Position Title Principal

Telephone # 331-5300 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	12
Code 15	Post-observation conference with instructor	12	12	12	12
Code 16	Final conference with instructor	18	12	12	12
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 [Signature] Date 10-2-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 reimbursable K-12 evaluations	85	85
Avg. time p/ goals & obj. conf. with instructor	17.5	37.5
Total Time (in minutes)	1488	3188
Per Hour	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	85	85
Avg. time p/ post-observation conf. with instructor	20.0	35.0
Total Time (in minutes)	1700	2975
Per Hour	60	60
Hours Worked (Code 15)	28.3	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	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
- 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 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

Activities	2006-2007		2007-2008		Average	
	A	B&C	A	B&C	A	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 (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
- Code 15- Post-observation conference with instructor
- Code 16- Final conference with instructor
- Code 17- District reporting

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:

Schoolsite	Staff	*Activity Codes												
		11			12			13			14			
		A	B	C	A	B	C	A	B	C	A	B	C	D
Aviara Oaks Elementary	Kimberly Ann Huesing	20	20	20	30	30	30	30	30	30	45	45	45	45
Buena Vista	Tina Howard	**120	60		60			60	60		**240	**240	**240	**240
Calavera Hills Elementary	Leslie Harden	10			15	15			5	5	5	15	15	10
Calavera Hills Middle	Cattina Hancock	40	40	40	5	5	5				45	45	45	45
Carlsbad Valley Academy	Keith Holley	15	15		15	15					60	60	60	60
Carlsbad High	Bill Lord	15			15						**120			
	Marjorie Giordani	15			15						**240			
	Tom Bloomquist	10			10						**240			
Hope	Rich Tubbs	10			5	10	10	5	10	10	5	5	15	15
Jefferson	Carol Van Vooren	15			10	10	5	5	2	2	2	2	10	10
Kelly	Theresa Armstrong	10	10	10	10	10	10	5	5	5	5	10	10	10
Pacific Rim	Robert Devich			30			60				30			30
Poinsetta	Steve Ahle	5	5	5	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
Averages		16	23	19	21	18	15	20	18	19	13	16	27	26
Summation of criteria B and C		42			30						32			
Averages to be used		15			15	30		15	30		20			50

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

- (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

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

Schoolsite	Staff	*Activity Codes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Elementary	Kimberly Ann Huesing	30	30	30	30	30	30	30	30	30	30	30	30
Buena Vista	Tina Howard	60	**120			**240	**120	60	60	**240	**240	**240	**240
Calavera Hills Elementary	Leslie Harden	5	10	10	5	5	10	10	5	30			
Calavera Hills Middle	Catrina Hancock	20	20	20	20	40	40	40	40	5	5	5	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							
Hope	Rich Tubbs	5	10	10	10	5	5	10	5	5	5	5	5
Jefferson	Carol Van Vooren	2	10	5	10	10	10	10	10	5	5	5	5
Kelly	Theresa Armstrong	10	10	10	10	10	10	10	10	5	5	5	5
Pacific Rim	Robert Devich												
Poinsetta	Steve Ahle	12	12	12	12				30				
Valley Middle	Julio Cesar Morales	12	12	12	12	18	18	18	18	1	1	1	1
Averages		23	17	17	15	20	18	23	23	9	12	9	9
Summation of criteria B and C		34				41				10			
Averages to be used		20				20				10			

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

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.

CUSD
District/COE

AOE
Department/Location

Kimberly Huesig
Employee Name

Principal
Exact Position Title

760-331-6000 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

- 4 Teachers

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			
		A	B	C	D
Code 11	Preparing for the evaluation	20	20	20	20
Code 12	Goals and objectives conference with instructor	30	30	30	30
Code 13	Pre-observation conference with instructor	30	30	30	30
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

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 Kimberly Huesig Date 10/14/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CARLSBAD UNIFIED
 District/COE

RUENA VISTA
 Department/Location

TINA HOWARD
 Employee Name

PRINCIPAL
 Exact Position Title

(700) 331-5400 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	2.0	1.0		
Code 12	Goals and objectives conference with instructor	1.0			
Code 13	Pre-observation conference with instructor	1.0	1.0		
Code 14	Classroom observation of instructor	4.0	2	2	2
Code 15	Post-observation conference with instructor	1	2		
Code 16	Final conference with instructor	4	2	1	1
Code 17	District Reporting	4	4	4	4

Assume she put hours - change to min

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 Tina Howard Date 10/6/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CHSD
 District/COE

CHS
 Department/Location

L Harder
 Employee Name

Principal
 Exact Position Title

3316300 Telephone # 12mo Work year length(circle) 11mo / 10mo / hrly

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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		5	5	
Code 14	Classroom observation of instructor	5	15	15	10
Code 15	Post-observation conference with instructor	5	10	10	5
Code 16	Final conference with instructor	5	10	10	5
Code 17	District Reporting		30		

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 L Harder Date 11/10/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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/COE CUSD

Department/Location CHMS

Employee Name Catrina Hancock

Exact Position Title PRINCIPAL

Telephone # 351-1440 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
	A	B	C	D
Code 11 Preparing for the evaluation	40	40	40	40
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	20	20	20	20
Code 16 Final conference with instructor	40	40	40	40
Code 17 District Reporting	5	5	5	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 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 [Signature] Date 10/16/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CUSD
District/COE

CVA
Department/Location

Keith Holley
Employee Name

Director
Exact Position Title

331-5200 12mo/11mo/10mo/hrly
Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	15	15		
Code 12	Goals and objectives conference with instructor	15	15		
Code 13	Pre-observation conference with instructor	15			
Code 14	Classroom observation of instructor	60	60	60	60
Code 15	Post-observation conference with instructor	40	40	40	
Code 16	Final conference with instructor	20	20	20	
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 on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature Keith Holley Date 10-15-08

If you have any questions, please contact Keith Holley at 331-5200

PLEASE SUBMIT THIS INFORMATION BY _____ : TO _____

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.

CUSD
 District/COE

Adm/CHS
 Department/Location

Bill Lora
 Employee Name

Assist Principal
 Exact Position Title

(760) 331 5197 12mo/11mo/10mo/h/ly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
		A	B	C	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	20			
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 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 [Signature] Date 10/9/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

Carlson Knipe
 District/COE

CHS Administration
 Department/Location

Mary Jo Gordon
 Employee Name

Assistant Principal
 Exact Position Title

(760) 331-5196 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	hrs		
Code 15	Post-observation conference with instructor	30			
Code 16	Final conference with instructor	30			
Code 17	District Reporting				

* Refer to Bloomquist

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 Mary Jo Gordon Date 10/3/2008

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CUSD
 District/COE

CHS / Admin.
 Department/Location

Tom Blomquist
 Employee Name

Assistant Principal
 Exact Position Title

331-5198
 Telephone #

12mo/11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	minutes		
Code 12	Goals and objectives conference with instructor	10	minutes		
Code 13	Pre-observation conference with instructor	10	minutes		
Code 14	Classroom observation of instructor	4	hours		
Code 15	Post-observation conference with instructor	40	minutes		
Code 16	Final conference with instructor	20	minutes		
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 [Signature] Date 10/2/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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/COE Carlsbad Department/Location HOPE
 Employee Name Rich Tobbs Exact Position Title Principal
 Telephone # 331 5901 Work year length(circle) 12mo/11mo/10mo/hrlly Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	10			
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 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 Richard Tobbs Date 9-24-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

Carlsbad
 District/COE

Jefferson
 Department/Location

Carol Van Voorse
 Employee Name

Principal
 Exact Position Title

(760) 336-5599
 Telephone #

12mo/11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	5	10
Code 16	Final conference with instructor	10	10	10	10
Code 17	District Reporting	5	5	5	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 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 Carol Van Voorse Date 10/20/04

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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/COE CU50

Department/Location Kelly

Employee Name Tressie Armstrong

Exact Position Title Principal

Telephone # 760 331 5800 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	—	—	→
Code 12	Goals and objectives conference with instructor	10	—	—	→
Code 13	Pre-observation conference with instructor	5	—	—	→
Code 14	Classroom observation of instructor	10	—	—	→
Code 15	Post-observation conference with instructor	10	—	—	→
Code 16	Final conference with instructor	10	—	—	→
Code 17	District Reporting	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 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 J. Armstrong Date 9/24/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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.

CUSD
District/COE

Pacific Rim
Department/Location

Robert Deulich
Employee Name

Principal
Exact Position Title

331-6200 12mo/11mo/10mo/hrly
Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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				

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 [Signature] Date 10-16-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

SA 1.7b

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.

CUSD
 District/COE

Poinsettia
 Department/Location

Steve Akh
 Employee Name

Principal
 Exact Position Title

331-6500
 Telephone #

12mo / 11mo / 10mo / hrly
 Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

- | | |
|---|---|
| Reimbursable Activities Codes: | Evaluation Criteria: |
| Code 11 Preparing for the evaluation | (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			
	A	B	C	D
Code 11 Preparing for the evaluation	5	5	5	5
Code 12 Goals and objectives conference with instructor	27	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	12	12	12	12
Code 16 Final conference with instructor				
Code 17 District Reporting	1	1	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 [Signature] Date 11/4/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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/COE CUSD Department/Location VMS
 Employee Name Julio Cesar Morales Exact Position Title Principal
 Telephone # _____ Work year length(circle) 12mo/11mo/10mo/hrly Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	12
Code 15	Post-observation conference with instructor	12	12	12	12
Code 16	Final conference with instructor	18	18	18	18
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 [Signature] Date 10-3-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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	25.0
Total Time (in minutes)	3038	5625
Per Hour	60	60
Hours Worked (Code 13)	50.6	93.8
# 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
- (C) 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)	<u>70.0</u>	<u>140.0</u>
# 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)	<u>93.3</u>	<u>186.7</u>
# 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)	<u>56.0</u>	<u>93.3</u>
# 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)	<u>140.0</u>	<u>256.7</u>
# 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)	<u>93.3</u>	<u>140.0</u>
# 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)	<u>93.3</u>	<u>163.3</u>
# of reimbursable K-12 evaluations		280
Avg. time p/ district reporting		15
Total Time (in minutes)		4200
Per Hour		60
Hours Worked (Code 17)		<u>70.0</u>

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

Activities	2006-2007		2007-2008		Average	
	A	B&C	A	B&C	A	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 (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
- Code 15- Post-observation conference with instructor
- Code 16- Final conference with instructor
- Code 17- District reporting

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

Schoolsite	Staff	*Activity Codes														
		11			12			13			14					
		A	B	C	A	B	C	A	B	C	A	B	C	D		
Aviara Oaks Elementary	Kimberly Ann Huesing	30	30	30	25	25	25	75	75	75	75	75	75	**115	**115	**115
Aviara Oaks Middle	Carolyn Millikin	20	20	20	10	10	10	10	10	10	10	10	10	15	15	15
	David Kalk	5	5	5	10	10	10	10	10	10	10	10	10	5	20	20
Calavera Hills Elementary	Leslie Harden	10			15	15					5	5		5	15	15
Calavera Hills Middle	Catina Hancock	20	20	20	5	5	5	5						45	45	45
Carlsbad Valley Academy	Keith Holley	15	15		15	15		15						20	30	30
Carlsbad High	Bill Lord	15			15			15						60		
	Marjorie Giordani	15			15			15						**240		
	Tom Bloomquist	10			10			10						**120		
Hope	Rich Tubbs	10			5	5	5	5	5	5	5	5	5	5	10	10
Jefferson	Carol Van Vooren				10	10	10	10	10	10	10	10	10			
Kelly	Theresa Armstrong	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Pacific Rim	Robert Devich			30			60			60			30			30
Poinsetta	Steve Ahle	13	13	13	9	9	9	9	9	9	9	9	9	9	9	9
Valley Middle	Julio Cesar Morales				15	15	15	15	15	15	12	12	12	12	12	12
	Chad Lund	**300	**300	**300	**150	**150	**150	**150	**150	**150	**450	**450	**450	**600	**600	**600
Averages		14	15	16	12	12	11	15	17	16	16	16	20	19	18	18
Summation of criteria B and C		32	32	32	23	23	23	33	33	33	37	37	37			
Averages to be used		14	30	30	12	20	20	15	15	30	15	30	35	15	35	35

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

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

Schoolsite	Staff	*Activity Codes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
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	10	10	10	2	2	2	2
	David Kalk	10	10	10	10	20	20	10	10	5	5	5	5
Calavera Hills Elementary	Leslie Harden	5	10	10	5	5	10	10	5	30			
Calavera Hills Middle	Catina Hancock					20	20	20	20	5	5	5	5
Carlsbad Valley Academy	Keith Holley	20	20	20		10	10	10		15			
Carlsbad High	Bill Lord	30				30							
	Marjorie Giordani	30				30							
	Tom Bloomquist	20				20							
Hope	Rich Tubbs	5	10	15	5	5	5	10	5	5	5	5	5
Jefferson	Carol Van Vooren					10	10	10	5	5	5	5	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	9	9	9	9								
Valley Middle	Julio Cesar Morales	12	12	12	12	18	18	18	18				
	Chad Lund	**450	**450	**450	**450	**300	**300	**300	**300	**300	**300	**300	**300
Averages		21	18	19	18	20	19	19	19	16	17	15	15
Summation of criteria B and C		37				38				16			
Averages to be used		20				20				15			

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 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)
 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.

CUSD
 District/COE

AOE
 Department/Location

Kimberly Huesing
 Employee Name

Principal
 Exact Position Title

760-331-6000 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- Code 17 District reporting

Evaluation Criteria:

- (A) district standards and test results ^{SD}
- (B) instructional techniques/strategies
- (C) adherence to curricular objectives
- (D) suitable learning environment

10 Teachers

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			
	A	B	C	D
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 instructor	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

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 Kimberly Huesing Date 10/14/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE _____ Department/Location Adm

Employee Name Carolyn Millikin Exact Position Title _____

Telephone # _____ Fiscal Year: 05-06 06-07 07-08

Work year length(circle) 12mo/11mo/10mo/hrly Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation		20	20	20
Code 12	Goals and objectives conference with instructor	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 instructor		10	10	10
Code 16	Final conference with instructor		10	10	10
Code 17	District Reporting		2	2	2

*2 forms
for
per
years*

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 Carolyn Millikin Date 10-13-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

Carlsbad - USD
 District/COE

Arroyo Oaks middle
 Department/Location

David Kalk
 Employee Name

ASST principal
 Exact Position Title

331-6198 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	5	5	5	5
Code 12 Goals and objectives conference with instructor	10	10	10	10
Code 13 Pre-observation conference with instructor	10	10	10	10
Code 14 Classroom observation of instructor	5	20	20	5
Code 15 Post-observation conference with instructor	10	10	10	10
Code 16 Final conference with instructor.	10	20	20	10
Code 17 District Reporting	5	5	5	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 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 [Signature] Date 10/8/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE CUSD Department/Location CATK
 Employee Name L. Harder Exact Position Title Principal
 Telephone # 3316300 Work year length(circle) 12mo/11mo/10mo/hrly Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

- 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
 - 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
- 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			
		A	B	C	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		5	5	
Code 14	Classroom observation of instructor	5	15	15	10
Code 15	Post-observation conference with instructor	5	10	10	5
Code 16	Final conference with instructor	5	10	10	5
Code 17	District Reporting		30		

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 L. Harder Date 11/10/08
 If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CLSD
District/COE

CHMS
Department/Location

CARINA Hancock
Employee Name

PRINCIPAL
Exact Position Title

331-4440 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	20	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 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 [Signature] Date 10/16/08
If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD District/COE CVA Department/Location
Keith Holley Employee Name Director Exact Position Title
331-5200 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)
Fiscal Year: 05-06 06-07 07-08
Circle the years for which you are responding.

- 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
 - 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
- 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			
		A	B	C	D
Code 11	Preparing for the evaluation	15	15		
Code 12	Goals and objectives conference with instructor	15	15		
Code 13	Pre-observation conference with instructor	15			
Code 14	Classroom observation of instructor	20	30	30	30
Code 15	Post-observation conference with instructor	20	20	20	
Code 16	Final conference with instructor	10	10	0	
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 on your personal knowledge or information." This information is used for cost accounting purposes only. PLEASE USE BLUE INK

Employee Signature Keith Holley Date 10-15-08
If you have any questions, please contact Keith Holley, at 331-5200
PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD
 District/COE

Adm / CTS
 Department/Location

Bill Long
 Employee Name

Assist Principal
 Exact Position Title

(260) 331 5197 Telephone # 12mo/11mo/10mo/hrly Work year length (circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	60			
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 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 Bill Long Date 10/9/03

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

Carol Ann Unpeil
 District/COE

CHS/ Administration
 Department/Location

Maryanne Jordan
 Employee Name

Assistant Principal
 Exact Position Title

(760) 331-5198 12mo (11mo) (10mo) /hrly
 Telephone # Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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				

hrs
 - refer to
 Bloomquist

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 Maryanne Jordan Date 10/3/2008

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD
 District/COE

CHS / Admin.
 Department/Location

Tom Bloomquist
 Employee Name

Assistant Principal
 Exact Position Title

331-5198 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	minutes		
Code 12	Goals and objectives conference with instructor	10	minutes		
Code 13	Pre-observation conference with instructor	10	minutes		
Code 14	Classroom observation of instructor	2	hours		
Code 15	Post-observation conference with instructor	20	minutes		
Code 16	Final conference with instructor	20	minutes		
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 [Signature] Date 10/2/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE Carlsbad Department/Location HOPE
 Employee Name Rich Tobbs Exact Position Title Principal
 Telephone # 331 5900 Work year length(circle) 12mo/11mo/10mo/hrly Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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

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 Richard Tobbs Date 9-24-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

<u>Carlsbad</u>	<u>Jefferson</u>
District/COE	Department/Location
<u>Carol VanVooren</u>	<u>Principal</u>
Employee Name	Exact Position Title
<u>(760) 331-5599</u>	Fiscal Year: 05-06 06-07 <u>07-08</u>
Telephone #	Circle the years for which you are responding.
<u>12mo/11mo/10mo/hrly</u>	
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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation				
Code 12	Goals and objectives conference with instructor	10	10	10	5
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	10	10	10	5
Code 17	District Reporting	5	5	5	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 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 Carol VanVooren Date 10/26/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD
 District/COE

Kelley
 Department/Location

Tressae Armstrong
 Employee Name

Principal
 Exact Position Title

760 331 5800 Telephone # 12mo Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	—	—	→
Code 12	Goals and objectives conference with instructor	10	—	—	→
Code 13	Pre-observation conference with instructor	5	—	—	→
Code 14	Classroom observation of instructor	10	—	—	→
Code 15	Post-observation conference with instructor	10	—	—	→
Code 16	Final conference with instructor	10	—	—	→
Code 17	District Reporting	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 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 T. Armstrong Date 9/24/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE: CUSD Department/Location: Pacific Rim
 Employee Name: Robert Deuch Exact Position Title: Principal
 Telephone #: 331-6200 Work year length(circle): 12mo/11mo/10mo/hrly Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

- | | |
|---|---|
| Reimbursable Activities Codes: | Evaluation Criteria: |
| Code 11 Preparing for the evaluation | (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			
	A	B	C	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				

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: [Signature] Date: 10-16-08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

SA 1.7c

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

Carlsbad
 District/COE

Poinsettia
 Department/Location

Steve Aale
 Employee Name

Principal
 Exact Position Title

331-6500
 Telephone #

.12mo/11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	13	13	13	13
Code 12 Goals and objectives conference with instructor	9	9	9	9
Code 13 Pre-observation conference with instructor	9	9	9	9
Code 14 Classroom observation of instructor	9	9	9	9
Code 15 Post-observation conference with instructor	9	9	9	9
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 [Signature] Date 11-4-08

If you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE Catalina USD Department/Location Valley MS
 Employee Name J Cesar Morales Exact Position Title Principal
 Telephone # 331-5300 Work year length(circle) 12mo Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	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	12
Code 15	Post-observation conference with instructor	12	12	12	12
Code 16	Final conference with instructor	18	18	18	18
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 [Signature] Date 10-2-05
 If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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 time spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

CUSD
 District/COE

VALLEY MIDDLE SCHOOL
 Department/Location

CHAD LUND
 Employee Name

ASSISTANT PRINCIPAL
 Exact Position Title

96-331-5297 Telephone # 12mo/11mo/10mo/hrly Work year length(circle)

Fiscal Year: 05-06 06-07 07-08
 Circle the years for which you are responding.

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	360	300	300	300
Code 12	Goals and objectives conference with instructor	150	150	150	150
Code 13	Pre-observation conference with instructor	450	450	450	450
Code 14	Classroom observation of instructor	600	600	600	600
Code 15	Post-observation conference with instructor	450	450	450	450
Code 16	Final conference with instructor	300	300	300	300
Code 17	District Reporting	300	300	300	300

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 [Signature] Date 10/1/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE CUSD Fiscal Year: 07-08

Type of Training Activity Mandated part inservice Training Location CHS

Date of Activity Sept 2007 Start and End Times 1:00 pm to 3:00 pm

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Emily Smith	Adm. Assent	CHS	Trainer <u>Trainee</u>
2 Bill ^{Lord} Smith	Asst Principal	CHS	Trainer <u>Trainee</u>
3			Trainer Trainee
4			Trainer Trainee
5			Trainer Trainee
6			Trainer Trainee
7			Trainer Trainee
8			Trainer Trainee
9			Trainer Trainee
10			Trainer Trainee

per Sheryl

Provide a brief description of the training curriculum or attach copy of agenda and materials:

Brand Lantz

The 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

Employee Signature [Signature] Date 10/9/08

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE CUSD Fiscal Year: 07-08
Mandated Costs Training Location CHS
 Type of Training Activity Sept 2007 Start and End Times 1:00 - 3:00
 Date of Activity _____

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Tom Bloomquist	Assistant Princ.	CHS	Trainer <u>Trainee</u>
2 Cynthia Sims	Admin. Assist.	CHS	Trainer <u>Trainee</u>
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 attach copy of agenda and materials:

The 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

Employee Signature Cynthia Sims Date 10/2/08

If you have any questions, please contact _____, at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE Carlsbad Unified Fiscal Year: 2007-2008

Mandated Costs Insurer @ HS

Type of Training Activity _____ Training Location _____

Date of Activity September 2007 Start and End Times 1:00 - 3:00

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 <u>Marjorie Giordani</u>	<u>Assistant Principal</u>		Trainer <u>Trainee</u>
2 <u>Phyllis Setser</u>	<u>Administrative Assistant</u>		Trainer <u>Trainee</u>
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 attach copy of agenda and materials:
Mr. Hancock addressed forms, situations required for submission.

The 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

Employee Signature [Signature] Date 10/2/2008

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE Carlsbad Unified Fiscal Year: 2007-08

Type of Training Activity Training of Evaluators Training Location Dist. Office

Date of Activity 2-12-08 Start and End Times 3:00 - 4:30

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Devin Vodicka	Dir. Curric. & Instr.	Dist. Office	Trainer <input checked="" type="radio"/> Trainee
2 Tressie Armstrong	Principal	Kelly Elem.	Trainer <input checked="" type="radio"/> Trainee
3 Kimberly Huesing	Principal	AOE Elem.	Trainer <input checked="" type="radio"/> Trainee
4 Catina Hancock	Principal	CHM Elem.	Trainer <input checked="" type="radio"/> Trainee
5 J. Cesar Morales	Asst. Principal	Valley Middle	Trainer <input checked="" type="radio"/> Trainee
6 Chad Lund	Asst Principal	Valley Middle	Trainer <input checked="" type="radio"/> Trainee
7 Dave Kalk	"	A.O. Middle	Trainer <input checked="" type="radio"/> Trainee
8 Tine Howard	"	Calavera Middle	Trainer <input checked="" type="radio"/> Trainee
9 Tom Bloomquist	"	Carlsbad High	Trainer <input checked="" type="radio"/> Trainee
10 - Pitt Lord	"	"	Trainer <input checked="" type="radio"/> Trainee
10 Marjorie Giordani	"	"	Trainer <input checked="" type="radio"/> Trainee

Provide a brief description of the training curriculum or attach copy of agenda and material:
CUSD Performance Evaluation System Training for first year principals, and assistant principals
 The 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

Employee Signature [Signature] Date 10/14/08

If you have any questions, please contact PERSONNEL DEPARTMENT at 760-33-5010

PLEASE SUBMIT THIS INFORMATION BY CARLSBAD UNIFIED SCHOOL DISTRICT
6225 EL CAMINO REAL
CARLSBAD, CA 92009

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

District/COE: _____

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 Statistical Data	Fiscal Year		
	05-06	06-07	07-08
1 A K-12 Probationary Teachers- Total Number			85
1 B K-12 Permanent Teachers- Total Number			450
1 C K-12 Temporary Teachers- Total Number			30
1 D K-12 Classroom Teachers- A + B+ C = Total Number			565
2 A K-12 Probationary Teachers- Total Number Evaluated			85
2 B K-12 Permanent Teachers- Total Number Evaluated			225
2 C K-12 Temporary Teachers- Total Number Evaluated			30
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated			340
3* K-12 Categorical/Grant Teachers- Total Number Evaluated			10
4 Reimbursable K-12 Evaluations- Line 2 D subtract Line 3			320

330

*E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52176 LEP/Bilingual
 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
 U.S.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant- funded personnel

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 Patricia L. Delaney Date 10/8/08

If you have any questions, please contact _____, at 760-331-5027

PLEASE SUBMIT THIS INFORMATION BY _____
 PERSONNEL DEPARTMENT
 CARLSBAD UNIFIED SCHOOL DISTRICT
 6225 EL CAMINO REAL
 CARLSBAD, CA 92009

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

DISTRICT STATISTICS REPORT

District/COE: Carlsbad Unified

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

Statistical Data: Certificate Staff on Unsatisfactory Status	Fiscal Year		
	05-06	06-07	07-08
5 K-12 Permanent Instructors			
A. Number on unsatisfactory status			0
B. Number of re-evaluations			0
6 Permanent Non-Instructors:			
A. Number on unsatisfactory status			0
B. Number of re-evaluations			0
7 Reimbursable Re-evaluations 5 B + 6 B = Total			0

Non-reimbursable re-evaluations (Do not include in the statistics above)

1. Any positions funded by these categoricals:

- E.C. 52012 School Improvement
- E.C. 52176 LEP/Bilingual
- E.C. 54425(b) Chapter 1 Federal compensatory education
- E.C. 54444.2 Migrant Children
- E.C. 62002.5 State Categorical
- E.C. 52065 Native American
- E.C. 52852 Coordinated Categorical
- E.C. 54724 Drop-out Prevention
- U.S.C. 25; 2604 Indian School Assistance Act

2. Any position that is grant-funded

3. Re-evaluations of temporary and long-term substitute teachers.

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 Mary Kuhn Date 10-3-08
 If you have any questions, please contact Mary Kuhn at 760-331-5026

PLEASE SUBMIT THIS INFORMATION BY _____

PERSONNEL DEPARTMENT
 CARLSBAD UNIFIED SCHOOL DISTRICT
 6225 EL CAMINO REAL
 CARLSBAD, 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

Rates 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 = County
 D = District

CA= Common Administration
 J = Joint Powers Agency

				APPROVED RATES				
				For use with state and federal programs, as allowable, in:				
County Code	LEA Code	Type**	LEA Name	2004-05 <small>(based on 2002-03 expenditure data)</small>	2005-06 <small>(based on 2003-04 expenditure data)</small>	2006-07 <small>(based on 2004-05 expenditure data)</small>	2007-08 <small>(based on 2005-06 expenditure data)</small>	2008-09 <small>(based on 2006-07 expenditure data)</small>
37	10371	C	San Diego County Superintendent					
37	67967	D	Alpine Union Elementary	9.84%	8.54%	8.22%	10.27%	9.76%
37	67975	D	Bonsall Union Elementary	3.50%	3.16%	2.99%	3.30%	3.27%
37	67983	D	Borrego Springs Unified	4.54%	4.41%	4.71%	4.05%	3.67%
37	67991	D	Cajon Valley Union Elementary	6.07%	8.52%	7.95%	5.36%	7.72%
37	68007	D	Cardiff Elementary	5.55%	7.46%	7.28%	5.98%	5.13%
37	68023	D	Chula Vista Elementary	3.96%	4.44%	3.82%	3.67%	3.83%
37	68031	D	Coronado Unified	5.36%	4.76%	3.83%	3.54%	3.33%
37	68049	D	Dehesa Elementary	8.08%	6.29%	6.41%	3.97%	4.85%
37	68056	D	Del Mar Union Elementary	7.45%	5.62%	5.92%	1.72%	3.86%
37	68080	D	Encinitas Union Elementary	5.42%	6.00%	2.98%	2.07%	4.80%
37	68098	D	Escondido Union Elementary	6.33%	5.04%	5.22%	5.19%	4.11%
37	68106	D	Escondido Union High	5.75%	4.97%	4.21%	4.80%	5.30%
37	68114	D	Fallbrook Union Elementary	10.22%	8.07%	7.20%	8.03%	10.22%
37	68122	D	Fallbrook Union High	6.11%	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	Jamul-Dulzura Union Elementary	4.68%	5.70%	5.03%	3.19%	3.38%
37	68163	D	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%	3.84%
37	68296	D	Poway Unified	6.18%	5.85%	5.94%	6.41%	6.07%
37	68304	D	Ramona City Unified	5.17%	5.19%	5.55%	4.95%	4.23%
37	68312	D	Rancho Santa Fe Elementary	6.62%	7.67%	6.74%	6.46%	6.52%
37	68338	D	San Diego Unified	8.29%	11.03%	9.99%	9.41%	8.82%
37	68346	D	San Dieguito Union High	3.58%	5.83%	3.67%	4.64%	5.75%
37	68353	D	San Pasqual Union Elementary	6.54%	7.45%	8.12%	6.12%	4.22%
37	68361	D	Santee Elementary	5.01%	5.82%	0.32%	0.29%	3.51%
37	68379	D	San Ysidro Elementary	5.14%	7.06%	6.98%	6.46%	7.44%
37	68387	D	Solana Beach Elementary	4.89%	5.58%	5.94%	4.31%	7.09%
37	68395	D	South Bay Union Elementary	8.15%	11.18%	9.01%	7.22%	7.30%
37	68403	D	Spencer Valley Elementary	6.11%	6.15%	6.90%	6.13%	4.65%
37	68411	D	Sweetwater Union High	15.10%	15.98%	12.57%	2.01%	1.63%
37	68437	D	Vallecitos Elementary	4.99%	4.63%	4.75%	5.37%	4.96%
37	68452	D	Vista Unified	8.49%	3.65%	5.56%	6.04%	8.07%
37	73551	D	Carlsbad Unified	4.57%	4.61%	3.61%	3.99%	4.65%
37	73569	D	Oceanside Unified	5.73%	5.83%	6.48%	4.84%	6.18%
37	73791	D	San Marcos Unified	4.53%	4.44%	4.32%	3.21%	2.84%
37	75416	D	Warner Unified	4.07%	3.16%	3.74%	3.78%	3.61%
37	75614	D	Valley Center-Pauma Unified	6.17%	7.42%	10.93%	7.73%	8.34%
				5.89%	7.98%	6.32%	5.82%	5.96%

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	Title	Fiscal Years:	
		06-07	07-08
	AVERAGE ACCOUNTING TECHNICIAN	\$ 25.38	\$ 28.56
	AVERAGE ADMINISTRATIVE ASSISTANT	\$ 26.22	\$ 31.22
	AVERAGE ADMINISTRATIVE SECRETARY	\$ 27.57	\$ 28.90
	AVERAGE CLERK (ALL CLERKS)	\$ 21.14	\$ 24.16
	AVERAGE COORDINATOR	\$ 25.86	\$ 34.62
	AVERAGE COUNSELOR	\$ 60.48	\$ 56.08
	AVERAGE DIRECTOR	\$ 67.63	\$ 72.51
	AVERAGE GUIDANCE TECH	\$ 23.15	\$ 24.66
	AVERAGE HEALTH TECH	\$ 23.19	\$ 26.31
	AVERAGE INSTRUCTIONAL AIDE	\$	\$ 22.76
	AVERAGE OFFICE ASSISTANT	\$ 18.66	\$ 22.06
	AVERAGE PRINCIPAL	\$ 73.95	\$ 71.89
	AVERAGE PSYCHOLOGIST	\$ 61.11	
	AVERAGE REGISTRAR		

Average Administrative
 72.51 +
 71.89 +
 63.55 +
 207.95 ÷
 3 =
 69.31666666666666 *
Per VP Director
 207.95 *
 69.32

De Anda, Huosung,

SixTen and Associates
MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:		
		06-07	07-08	
	AVERAGE OFFICE ASSISTANT	\$ 18.66	\$ 22.06	
	AVERAGE PRINCIPAL	\$ 73.95	\$ 71.89	
	AVERAGE PSYCHOLOGIST	\$ 61.11		
	AVERAGE REGISTRAR			
	AVERAGE SECRETARY			
	AVERAGE SUBSTITUTE TEACHER	\$ 29.17		
	AVERAGE VICE-PRINCIPAL	\$ 64.57	\$ 63.55	
	SUBSTITUTE TEACHER (DAILY RATE WITH BENEFITS)	\$ 85.00	\$ 85.00	
	DIRECTOR, FACILITIES	\$ 64.78	\$ 66.40	
	TEACHER	\$ 60.21	\$ 65.81	
	ADMINISTRATIVE ASSISTANT	\$ 29.01		
	PRINCIPAL (POINSETTIA)	\$ 76.21	\$ 71.23	
	ASSISTANT PRINCIPAL (KELLY ELEM)	\$ 56.80	\$ 60.76	
	COUNSELOR	\$ 62.21	\$ 60.09	
	PHYSICAL PERFORMANCE TEST COORDINATOR (TEACHER)	\$ 34.82	\$ 35.60	
	CAMPUS SUPERVISOR	LEFT DISTRICT	\$ 19.14	
	ASSISTANT PRINCIPAL	\$ 68.95	\$ 69.93	
	ADMINISTRATIVE SECRETARY	\$ 33.17	\$ 37.05	
	LIBRARY TECHNICIAN	\$ 19.83	\$ 25.68	

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		06-07	07-08
EVANS, AMY	OFFICE CLERK	LEFT DISTRICT	
FLANAGAN, MELODY	ATTENDANCE CLERK	\$ 20.34	\$ 22.72
FORNELLI, LINDA	NURSE	\$ 34.11	\$ 32.95
FRAZIER, SUSAN	ACCOUNTANTING TECHNICIAN	LEFT DISTRICT	
FREEMAN, GAYLEN	DEPUTY SUPERINTENDENT	LEFT DISTRICT	
GARCIA, ALICE	ADMINISTRATIVE SECRETARY		\$ 27.66
GEARING, HEATHER	ADMINISTRATIVE ASSISTANT		\$ 27.00
GEARING, LINDA	ACCOUNTING TECHNICIAN	\$ 24.16	\$ 28.33
GLENN, SUSAN	ADMINISTRATIVE SECRETARY	\$ 31.55	
GOELTZ, KATHY	PSYCHOLOGIST	\$ 50.41	\$ 52.20
GONZALES, ALICE (JEAN)	ADMINISTRATIVE SECRETARY	\$ 23.58	
GUNZELMAN, CATHY	OFFICE ASSISTANT	\$ 18.89	\$ 21.09
HAINES DECHAIR, LUCY	DIRECTOR, CURRICULUM/INSTRUCTION		\$ 75.36
HANAGAN, MELODY			
HANCOCK, CATINA	PRINCIPAL	\$ 61.91	\$ 65.93
HANSEN, JUDITH	ADMINISTRATIVE ASSISTANT	\$ 24.77	\$ 27.66
HANSEN, ROSE MARIE	ATTENDANCE CLERK	\$ 20.34	\$ 22.72
HANSEN, SUSAN	INSTRUCTIONAL AIDE	\$ 18.89	
HARDEE, LESLIE	PRINCIPAL		

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		06-07	07-08
HARPER, DONNA	DIRECTOR, PURCHASING & STRS	\$ 60.96	\$ 64.58
HARTMAN, JANE	COORDINATOR OF SPECIAL PROGRAMS	\$ 64.99	\$ 62.78
HETRICK, LINDY	ADMINISTRATIVE ASSISTANT	\$ 26.00	\$ 29.04
HOLLEY, NORMAN /KEITH	COORDINATOR, ALT ED/PRINCIPAL	\$ 76.21	\$ 73.61
HOWARD, TINA IRENE	ASSISTANT PRINCIPAL	\$ 61.91	\$ 37.86
JACKSON, DEBRA	ADMINISTRATIVE SECRETARY	LEFT DISTRICT	
JENNINGS, DIANE	ADMINISTRATIVE ASSISTANT	\$ 30.80	\$ 29.78
JIMENO, ALICE	ADMINISTRATIVE SECRETARY	\$ 26.00	\$ 30.50
KALK, DAVE	ASSISTANT PRINCIPAL	\$ 58.50	\$ 58.15
KRYZAK, JENNIFER	HEALTH TECHNICIAN	\$ 20.86	\$ 24.46
KUHN, MARY	ADMINISTRATIVE SECRETARY-CONFIDENTIAL	\$ 31.98	\$ 33.88
LANE, KIM	HEALTH TECHNICIAN	\$ 24.15	\$ 28.32
LARSON, JENNIFER	HEALTH TECHNICIAN	\$ 25.36	\$ 28.32
LARSON, LESLIE	HEALTH TECHNICIAN	\$ 21.90	\$ 24.46
LEWIS, RICK	DIRECTOR, INFORMATION SYSTEMS	\$ 68.58	\$ 72.65
LORD IV, WILLIS (BILL)	ASSISTANT PRINCIPAL	\$ 68.95	\$ 66.60
LUTZ, CINDY	HEALTH TECHNICIAN	\$ 21.90	\$ 24.46
MADDOX, SHEILA	PRINCIPAL	\$ 72.58	
MARTINEZ, KERRY	STAR TESTING COORDINATOR		

used
for 1 year

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		06-07	07-08
MARTINEZ, PAUL	MAINTENANCE WORKER	\$ 34.85	\$ 38.93
McCORMAC, KATHRYN	LEAD ACCOUNTANT	\$ 37.14	\$ 41.30
McCORMICK, LAURA JEAN	OFFICE ASSISTANT	\$ 17.99	\$ 24.38
MERCHANT, SHARAN	IS SPECIALIST	\$ 34.85	\$ 38.93
MILLIKIN, CAROLYN	PRINCIPAL (VALLEY MIDDLE)	\$ 76.21	\$ 73.61
MIRANDA, LOLA			
MONDERINE, ROSEMARY	SENIOR BUYER	\$ 32.38	\$ 38.00
MORALES, JULIO CESAR	ASSISTANT PRINCIPAL	\$	\$ 58.15
MOYNAN, LINDA	STAR TESTING COORDINATOR		
NAVARRO, NANCY	DIRECTOR, FISCAL SERVICES	\$ 76.21	\$ 80.72
NORTON, TORRIE	ASSISTANT SUPERINTENDENT- PERSONNEL	\$ 94.20	\$ 90.99
O'CONNELL, SUZANNE	ASSISTANT SUPERINTENDENT- INSTRUCTIONAL	\$ 94.20	\$ 90.99
OGAN, LAURA	ATTENDANCE CLERK	\$ 20.34	\$ 22.72
OHLIN, EVANGELINE (VANGIE)	ADMINISTRATIVE SECRETARY	\$ 20.34	\$ 23.89
PARKER, RACHEL	COUNSELOR	\$	\$ 42.55
PFRANG, SHARON	OFFICE ASSISTANT	\$ 18.89	
PIERCE, ROBERT	TEACHER	\$	
PINNER, ROBIN	ADMINISTRATIVE ASSISTANT	\$ 61.86	\$ 59.75
PRICE, JULIE	OFFICE ASSISTANT	\$ 21.39	\$ 25.09
		\$ 17.99	\$ 21.09

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		06-07	07-08
PULASKI, LINDA	ATTENDANCE CLERK	\$ 24.15	\$ 26.31
RAMOS, BARBARA	ATTENDANCE CLERK	\$ 23.55	\$ 26.31
RAWLINGS, PHYLLIS	ADMINISTRATIVE SECRETARY	\$ 31.59	
REDFIELD, JULIA	COUNSELOR		\$ 58.43
REVIER, PATRICIA	GUIDANCE TECHNICIAN	\$ 25.35	\$ 28.32
REYNOLDS, CATHERINE	ADMINISTRATIVE ASSISTANT	\$ 24.18	\$ 26.99
RIDHELD, JULIA			
ROBERTSON, CAROLYN	HEALTH TECHNICIAN	\$ 25.35	\$ 28.32
ROSLUND, CYNTHIA	ADMINISTRATIVE ASSISTANT	\$ 23.58	\$ 26.34
RUBY, VICKI	GUIDANCE TECHNICIAN	\$ 15.54	\$ 21.13
SAGER, CARLYN (LYN)	IS SUPPORT ANALYST	\$ 36.59	
SALVADORI, JEANNE	DISTRICT NURSE 09/06	\$ 44.83	
SAMANIEGO, SUSANNA	INSTRUCTIONAL ASSISTANT	\$ 20.82	\$ 24.43
SANCHEZ, PAULA	HEALTH TECHNICIAN	\$ 20.86	\$ 24.46
SANDHAGE, MARIA	OFFICE ASSISTANT	\$ 21.86	\$ 24.43
SANTAMARIA, ANDRES	ASSISTANT PRINCIPAL	LEFT DISTRICT	
SCHROH, MELONY	COUNSELOR	\$ 54.05	\$ 56.35
SETSER, PHYLLIS E.	ADMINISTRATIVE SECRETARY	\$ 24.77	\$ 27.66
SHINTO, DEBRA	ADMINISTRATIVE ASSISTANT	\$ 25.39	\$ 28.36

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		06-07	07-08
SIMS, CYNTHIA	ADMINISTRATIVE SECRETARY	\$ 24.77	\$ 27.66
SMITH, CURTIS	PRINTING TECHNICIAN	\$ 30.07	\$ 33.59
SMITH, EMELIA (EMILY)	ADMINISTRATIVE SECRETARY	\$ 23.58	\$ 26.34
STANCHI, MARGARET	PRINCIPAL (CARLSBAD)	\$ 81.65	\$ 78.87
STROPLE, MARIA	OFFICE ASSISTANT	\$ 17.13	\$ 20.10
SWEARINGEN, BARBARA	ADMINISTRATIVE ASSISTANT	\$ 23.58	\$ 26.34
SWEARINGEN, DOLORES	FOOD SERVICE WORKER	LEFT DISTRICT	
TALBOT, ALICE	ACCOUNTING TECHNICIAN	\$ 26.59	\$ 29.70
TEMPLETON, WILLIAM LANCE	SKILL MAINTENANCE WORKER	\$ 33.19	\$ 37.07
THOMPSON, TRUDY	ADMINISTRATIVE ASSISTANT	\$ 33.17	\$ 38.90
TOKORCHEK, JAN	DATABASE ADMINISTRATOR	\$ 33.19	\$ 44.07
TROGDEN, ERIK	PRINCIPAL	\$ 70.24	
TRUXAW, PEGGY	OFFICE ASSISTANT	\$ 19.83	\$ 22.15
TUBBS, RICHARD	PRINCIPAL (HOPE)	\$ 65.00	\$ 64.62
VAN VOOREN, CAROL	PRINCIPAL (PINE & JEFFERSON)	\$ 76.21	\$ 73.61
VAN ZANT, STEVEN	PRINCIPAL	LEFT DISTRICT	
VILLAMAR, OFELIA	OFFICE ASSISTANT	\$ 17.99	\$ 21.09
VODICKA, DEVIN	DIRECTOR, CURRICULUM/INSTRUCTION	\$ 78.02	\$ 75.36
WADE, PATRICIA	INSTRUCTIONAL AASSISTANT	\$ 18.89	\$ 21.09

Fiscal Year

2006 - 2007

269

Six ten 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

Sacramento
3841 North Freeway Blvd., Suite 170
Sacramento, CA 95834
Telephone: (916) 565-6104
Fax: (916) 564-6103

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,



For Larry Hendee, Vice-President

Claim File Copy

CLAIM FOR PAYMENT Pursuant to Government Code Section 17561 THE STULL ACT	For State Controller Use Only (19) Program Number 00260 (20) Date Filed ___/___/___ (21) LRS Input ___/___/___	Program 260
---	---	------------------------

(01) Claimant Identification Number: S37030		Reimbursement Claim Data		
A B E L H E R E	(02) Claimant Name Carlsbad Unified School District		(22) SA-1, (03)(A)(f) 380	
	County of Location San Diego		(23) SA-1, (03)(B)(f)	
	Street Address 6225 El Camino Real		(24) SA-1, (03)(A)(1)(a)(f) 45,248	
	City Carlsbad	State CA	Zip Code 92009	(25) SA-1, (03)(A)(1)(b)(f) 61,805
	Type of Claim	Estimated Claim	Reimbursement Claim	
	(03) Estimated <input checked="" type="checkbox"/>	(09) Reimbursement <input checked="" type="checkbox"/>	(26) SA-1, (03)(A)(2)(a)(f) 21,053	
	(04) Combined <input type="checkbox"/>	(10) Combined <input type="checkbox"/>	(27) SA-1, (03)(A)(2)(b)(f) 29,877	
	(05) Amended <input type="checkbox"/>	(11) Amended <input type="checkbox"/>	(28) SA-1, (03)(B)(1)(a)(f)	
			(29) SA-1, (03)(B)(1)(b)(f)	
Fiscal Year of cost	(06) 2007-2008	(12) 2006-2007	(30) SA-1, (03)(B)(1)(c)(f)	
Total Claimed Amount	(07) \$ 185,000	(13) \$ 168,221	(31) SA-1, (03)(B)(1)(d)(f)	
Less : 10% Late Penalty, not to exceed \$10,000		(14) \$ -	(32) SA-1, (03)(B)(1)(e)(f)	
Less : Prior Claim Payment Received		(15) \$ -	(33) SA-1, (05) 6	
Net Claimed Amount		(16) \$ 168,221	(34) SA-1, (06) 10,237	
Due from State	(08) \$ 185,000	(17) \$ 168,221	(35) SA-1, (08)	
Due to State		(18)	(36) SA-1, (09)	

(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

1/23/08

Walter Freeman Assistant Superintendent, Business Services

Type or Print Name Title

(38) Name of Contact Person for Claim Telephone Number: (858) 514-8605

SixTen and Associates E-mail Address: kbpsixten@aol.com

Program 260	MANDATED COSTS THE STULL ACT CLAIM SUMMARY	FORM SA-1
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(01) Arabsbad Unified School District	(02) Type of Claim Reimbursement <input checked="" type="checkbox"/> Estimated <input type="checkbox"/>	Fiscal Year 2006-2007
--	---	---------------------------------

Direct Costs	Object Accounts					
(3) Reimbursable Components	(a) Salaries and Benefits	(b) Materials and Supplies	(c) Contract Services	(d) Fixed Assets	(e) Travel and Training	(f) Total
Certificated Instructional Employees (CIE)	Claim Statistics: Number of CIE's evaluated per (03)(A)(1) and (03)(A)(2)					380
1. Evaluate and assess performance	Ed. Code §44662, subd. (b), as amended by Ch. 498/83; Reimbursement period begins fy 1997-98					
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
2. Evaluate and assess CIE who teach certain subjects	Ed. Code §44662, subd. (b), as amended by Ch. 4/99; Reimbursement period begins 03/15/99					
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 evaluated per (03)(B)(1)					
1. Evaluate and assess CIE and NIE employees	Ed. Code §44664, subd. (b), as amended by Ch. 498/83; Reimbursement period begins fy 1997-98					
a. Evaluating and assessing CIE according to certain criteria	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
b. Reducing evaluation to writing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
c. Transmitting evaluation to CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
d. Attaching response to personnel file	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
e. Discussing evaluation with CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(f) Total Direct Costs	\$ 157,983.34	\$ -	\$ -	\$ -	\$ -	\$ 157,983.34

Indirect Costs	
(1) Indirect Cost Rate	[From J-380 or J-580] 6.48%
(2) Total Indirect Costs	[Line (05) x line (04)(a)] \$ 10,237.32
(3) Total Direct and Indirect Costs	[Line (04)(f) + line (06)] \$ 168,220.66

Cost Reduction	
(4) Less: Offsetting Savings	\$ -
(5) Less: Reimbursements	\$ -
(6) Total Claimed Amount	[Line (07) - (Line (08) + Line (09))] \$ 168,220.66

Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL						FORM SA-2	
(01) Claimant Leland Unified School District				(02) Fiscal Year 2006-2007				
(03) Reimbursable Components: Check only one box per form to identify the component being claimed.								
A. CIE		<input checked="" type="checkbox"/>	Review employee's techniques and strategies	<input type="checkbox"/>	Evaluation to include assessment of techniques and strategies			
		<input type="checkbox"/>	Review STR Results	<input type="checkbox"/>	Assessment based on STR results			
B. CIE & NIE		<input type="checkbox"/>	Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/>	Reducing evaluation to writing		<input type="checkbox"/>	Transmitting evaluation to CIE
		<input type="checkbox"/>	Attaching response to personnel file	<input type="checkbox"/>	Discussing evaluation with CIE			
(04) Description of Expenses				Object Accounts				
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses		(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Attendance at training required to perform evaluations								
Adams, Gwen Assistant Principal		\$60.21	7.5	\$ 451.58				
Armstrong, Tressie Principal		\$56.80	3.0	\$ 170.40				
DeAnda, Jose Principal		\$76.21	1.0	\$ 76.21				
Holley, Keith Director		\$76.21	2.0	\$ 152.42				
Trogdan, Erik Principal		\$70.24	3.0	\$ 210.72				
Training staff that will be performing the evaluations								
Millikin, Carolyn Principal		\$76.21	1.5	\$ 114.32				
Norton, Torrie Assistant Superintendent, Personnel		\$94.20	19.0	\$ 1,789.80				
Preparing to evaluate and assess the performance of a CIE								
Schoolsite Administrative St: Teacher Evaluations		\$70.53	214.7	\$ 15,142.79				
Discussing the CIE's goals and objectives								
Schoolsite Administrative St: Teacher Evaluations		\$70.53	255.2	\$ 17,999.26				
Pre-observation conference and discussion with CIE								
Schoolsite Administrative St: Teacher Evaluations		\$70.53	129.6	\$ 9,140.69				
(05) Total <input checked="" type="checkbox"/>		Subtotal <input type="checkbox"/>		Page 1 of 1	\$ 45,248.19	\$ -	\$ -	\$ -

Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL						FORM SA-2
(01) Claimant [Redacted] Unified School District				(02) Fiscal Year 2006-2007			
(03) Reimbursable Components: Check only one box per form to identify the component being claimed.							
A. CIE		<input type="checkbox"/> Review employee's techniques and strategies	<input checked="" type="checkbox"/> Evaluation to include assessment of techniques and strategies				
		<input type="checkbox"/> Review STR Results	<input type="checkbox"/> Assessment based on STR results				
B. CIE & NIE		<input type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing	<input type="checkbox"/> Transmitting evaluation to CIE			
		<input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Discussing evaluation with CIE				
(04) Description of Expenses				Object Accounts			
(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 Schoolsite Administrative St: Teacher Evaluations	\$70.53	354.0	\$ 24,967.62				
Post-observation conference and discussion with CIE Schoolsite Administrative St: Teacher Evaluations	\$70.53	203.7	\$ 14,366.96				
Discussing evaluation and write-up with CIE Schoolsite Administrative St: Teacher Evaluations	\$70.53	223.3	\$ 15,749.35				
Reducing evaluation to writing, forward to personnel file Schoolsite Administrative St: Teacher Evaluations	\$70.53	95.3	\$ 6,721.51				
(05) Total <input checked="" type="checkbox"/> Subtotal <input type="checkbox"/>			Page 1 of 1	\$ 61,805.44	\$ -	\$ -	\$ -

**MANDATED COSTS
THE STULL ACT
COMPONENT/ACTIVITY COST DETAIL**

FORM SA-2

Program 250			
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(01) Claimant [redacted] Unified School District	(02) Fiscal Year 2006-2007
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(03) Reimbursable Components: Check only one box per form to identify the component being claimed.

<p>A. CIE</p> <p><input type="checkbox"/> Review employee's techniques and strategies</p> <p><input checked="" type="checkbox"/> Review STR Results</p>	<p><input type="checkbox"/> Evaluation to include assessment of techniques and strategies</p> <p><input type="checkbox"/> Assessment based on STR results</p>
<p>B. CIE & NIE</p> <p><input type="checkbox"/> Evaluating and assessing CIE according to certain criteria</p> <p><input type="checkbox"/> Attaching response to personnel file</p>	<p><input type="checkbox"/> Reducing evaluation to writing</p> <p><input type="checkbox"/> Discussing evaluation with CIE</p> <p><input type="checkbox"/> Transmitting evaluation to CIE</p>

(04) Description of Expenses	Object Accounts						
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Preparing to evaluate and assess the performance of a CIE Schoolsite Administrative St: Teacher Evaluations	\$70.53	107.3	\$ 7,567.87				
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 St: Teacher Evaluations	\$70.53	68.6	\$ 4,838.36				
(05) Total			\$ 21,053.21	\$ -	\$ -	\$ -	\$ -

Page 1 of 1

Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
06-07	7.50	Adams, Gwen	Assistant Principal	\$60.21	\$451.58	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	7.50	Adams, Gwen Total			\$451.58		
06-07	3.00	Armstrong, Tressie	Principal	\$56.80	\$170.40	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	3.00	Armstrong, Tressie Total			\$170.40		
Aug-06	1.00	DeAnda, Jose	Principal	\$76.21	\$76.21	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	1.00	DeAnda, Jose Total			\$76.21		
8/15/2006	2.00	Holley, Keith	Director	\$76.21	\$152.42	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	2.00	Holley, Keith Total			\$152.42		
Oct-06	1.50	Millikin, Carolyn	Principal	\$76.21	\$114.32	Training staff that will be performing the evaluations	Review employee's techniques and strategies
	1.50	Millikin, Carolyn Total			\$114.32		
Jan-07	2.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$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	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	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	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	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	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	Training staff that will be performing the evaluations	Review employee's techniques and strategies
Oct-06	2.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$188.40	Training staff that will be performing the evaluations	Review employee's techniques and strategies
Nov-06	1.00	Norton, Torrie	Assistant Superintendent, Personnel	\$94.20	\$94.20	Training staff that will be performing the evaluations	Review employee's techniques and strategies
	19.00	Norton, Torrie Total			\$1,789.80		
06-07	107.30	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$7,567.87	Preparing to evaluate and assess the performance of a CIE	Review STAR results
06-07	214.70	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$15,142.79	Preparing to evaluate and assess the performance of a CIE	Review employee's techniques and strategies
06-07	122.60	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$8,646.98	Discussing the CIE's goals and objectives	Review STAR results
06-07	255.20	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$17,999.26	Discussing the CIE's goals and objectives	Review employee's techniques and strategies
06-07	68.60	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$4,838.36	Pre-observation conference and discussion with CIE	Review STAR results
06-07	129.60	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$9,140.69	Pre-observation conference and discussion with CIE	Review employee's techniques and strategies
06-07	173.70	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$12,251.06	Classroom observation to evaluate and assess performance	Assessment based on STAR results
06-07	354.00	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$24,967.62	Classroom observation to evaluate and assess performance	Evaluation to include assessment of techniques and strategies
06-07	121.80	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$8,590.55	Post-observation conference and discussion with CIE	Assessment based on STAR results
06-07	203.70	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$14,366.96	Post-observation conference and discussion with CIE	Evaluation to include assessment of techniques and strategies
06-07	128.10	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$9,034.89	Discussing evaluation and write-up with CIE	Assessment based on STAR results
06-07	223.30	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$15,749.35	Discussing evaluation and write-up with CIE	Evaluation to include assessment of techniques and strategies
06-07	95.30	Schoolsite Administrative Staff	Teacher Evaluations	\$70.53	\$6,721.51	Reducing evaluation to writing, forward to personnel file	Evaluation to include assessment of techniques and strategies
	2,197.90	Schoolsite Administrative Staff Total			\$155,017.89		
9/2/2006	3.00	Trodden, Erik	Principal	\$70.24	\$210.72	Attendance at training required to perform evaluations	Review employee's techniques and strategies
	3.00	Trodden, Erik Total			\$210.72		
	2,234.90	Grand Total			\$157,983.34		

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

FRISK
 Given?

District/COE: Carlsbad USD Fiscal Year: 06-07
 Employee Name: Guerra Adams Exact Position Title: Assistant Principal
 Department/Location: Paarce Rem Telephone #: 331-6200 Work year length(circle): 12mo/11mo/10mo/hrly

Reimbursable Activities Codes:

Code 31 Training evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.

Code 32 Evaluator trainees: Time spent by district staff to attend training, conducted by the district or any other source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, repeat training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
11	31 32	FRISK Training San Marcos	7.5	0
11	31 32			
11	31 32			
11	31 32			
11	31 32			
11	31 32			
11	31 32			
11	31 32			
11	31 32			

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 Guerra Adams Date 10-5-07

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

RECEIVED
 NOV 15 2007

BY:

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

District/COE: CUSD Fiscal Year: 06-07

Employee Name: TRESSIE ARMSTRONG Exact Position Title: PRINCIPAL

Department/Location: KELLY SCHOOL Telephone #: 760/331-5800 Work year length(circle): 12mo/11mo/10mo/hrly

Reimbursable Activities Codes:

- Code 31** Training evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.
- Code 32** Evaluator trainees: Time spent by district staff to attend training, conducted by the district or any other source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, repeat training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
11	31(32)	Administrator TRAINING PRIOR	3	—
11	31 32	to start of school		
11	31 32			
11	31 32			
11	31 32			
11	31 32			
11	31 32			
11	31 32			
11	31 32			

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: J. Armstrong Date: 10-10-07

If you have any questions, please contact _____, at _____
PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

RECEIVED
NOV 15 2007

BY:.....

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

District/COE: CUSD Fiscal Year: _____

Employee Name: Jose De Anda Exact Position Title: _____

Department/Location: BV Telephone #: _____ Work year length(circle) 12mo/11mo/10mo/hrly

Reimbursable Activities Codes:

Code 31 Training evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.

Code 32 Evaluator trainees: Time spent by district staff to attend training, conducted by the district or any other source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, repeat training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
8/10/06	(31) 32	District Admin. Training	1	
1/1	31 32	FRISK Training		
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			

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: Jose De Anda Date: 10/12/07

If you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

District/COE: CUSD Fiscal Year: 2006-2007
 Employee Name: Keith Holley Exact Position Title: Director
 Department/Location: CVA Telephone #: 331-5200 Work year length (circle): 12mo/11mo/10mo/hrly

Reimbursable Activities Codes:

Code 31 Training evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.

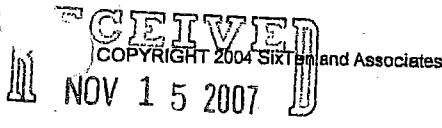
Code 32 Evaluator trainees: Time spent by district staff to attend training, conducted by the district or any other source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, repeat training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
8/15/2007	31 32		2	
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			

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: [Signature] Date: 9-27-07
 If you have any questions, please contact Keith Holley, at 331-5295
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____



BY:

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

District/COE: Carlsbad Fiscal Year: 06/07
 Employee Name: Carolyn Millikin Exact Position Title: Principal
 Department/Location: Valley HS Telephone #: 760.331-5300 Work year length(circle): 12mo

Reimbursable Activities Codes:

Code 31 Training evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.

Code 32 Evaluator trainees: Time spent by district staff to attend training, conducted by the district or any other source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, repeat training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

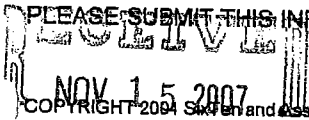
Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
10/10/06	31 32	Principal trained staff	1.5	
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			

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: [Signature] Date: _____

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____



BY: _____

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

District/COE: Carlsbad Unified Fiscal Year: 2006-07
 Employee Name: Torrie Norton Exact Position Title: Asst. Supt Personnel
 Department/Location: Personnel - D.O. Telephone #: 760-331-5025 Work year length(circle): 12mo/11mo/10mo/hrly

Reimbursable Activities Codes:

- Code 31** Training evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.
- Code 32** Evaluator trainees: Time spent by district staff to attend training, conducted by the district or any other source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, repeat training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
8/1/06	(31) 32	Training Administrators	4.0	—
9/1/06	(31) 32	"	2.0	—
10/1/06	(31) 32	"	2.0	—
11/1/06	(31) 32	"	1.0	—
11/1/07	(31) 32	"	2.0	—
2/1/07	(31) 32	"	2.0	—
3/1/07	(31) 32	"	4.0	—
4/1/07	(31) 32	"	1.0	—
5/1/07	(31) 32	"	1.0	—

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: Mary Kuhn Date: 10-1-07
 If you have any questions, please contact Torrie Norton at 760-331-5025

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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SA 1.6 -3

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

06/07

District/COE: Carlsbad/San Diego Fiscal Year: 05-06

Employee Name: Erik Trogden Exact Position Title: Principal

Department/Location: CHMS Telephone #: 766-331-6400 Work year length(circle): 12mo/11mo/10mo/hrly

Reimbursable Activities Codes:
Code 31 Training evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.
Code 32 Evaluator trainees: Time spent by district staff to attend training, conducted by the district or any other source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, repeat training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
9/1/06	31 32	Training	3	—
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			
/ /	31 32			

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: [Signature] Date: 9-22-06

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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
	<u>107.3</u>	<u>214.7</u>
Code 12		
Probationary	19.0	42.8
Permanent	93.3	186.7
Temporary	10.3	25.7
	<u>122.6</u>	<u>255.2</u>
Code 13		
Probationary	6.7	14.3
Permanent	56.0	93.3
Temporary	5.9	22.0
	<u>68.6</u>	<u>129.6</u>
Code 14		
Probationary	19.0	57.0
Permanent	140.0	256.7
Temporary	14.7	40.3
	<u>173.7</u>	<u>354.0</u>
Code 15		
Probationary	19.0	38.0
Permanent	93.3	140.0
Temporary	9.5	25.7
	<u>121.8</u>	<u>203.7</u>
Code 16		
Probationary	23.8	38.0
Permanent	93.3	163.3
Temporary	11.0	22.0
	<u>128.1</u>	<u>223.3</u>
Code 17		
Probationary		14.3
Permanent		70.0
Temporary		11.0
		<u>95.3</u>

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
- 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

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
- 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

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)	<u>4200</u>	<u>8400</u>
Per Hour	60	60
Hours Worked (Code 11)	<u>70.0</u>	<u>140.0</u>
# of reimbursable K-12 evaluations	280	280
Avg. time p/ goals & obj. conf. with instructor	20	40
Total Time (in minutes)	<u>5600</u>	<u>11200</u>
Per Hour	60	60
Hours Worked (Code 12)	<u>93.3</u>	<u>186.7</u>
# of reimbursable K-12 evaluations	280	280
Avg. time p/ pre-observation conf. with instructor	12	20
Total Time (in minutes)	<u>3360</u>	<u>5600</u>
Per Hour	60	60
Hours Worked (Code 13)	<u>56.0</u>	<u>93.3</u>
# of reimbursable K-12 evaluations	280	280
Avg. time p/ classroom observation of instructor	30	55
Total Time (in minutes)	<u>8400</u>	<u>15400</u>
Per Hour	60	60
Hours Worked (Code 14)	<u>140.0</u>	<u>256.7</u>
# of reimbursable K-12 evaluations	280	280
Avg. time p/ post-observation conf. with instructor	20	30
Total Time (in minutes)	<u>5600</u>	<u>8400</u>
Per Hour	60	60
Hours Worked (Code 15)	<u>93.3</u>	<u>140.0</u>
# of reimbursable K-12 evaluations	280	280
Avg. time p/ final conf. with instructor	20	35
Total Time (in minutes)	<u>5600</u>	<u>9800</u>
Per Hour	60	60
Hours Worked (Code 16)	<u>93.3</u>	<u>163.3</u>
# of reimbursable K-12 evaluations		280
Avg. time p/ district reporting		15
Total Time (in minutes)		<u>4200</u>
Per Hour		60
Hours Worked (Code 17)		<u>70.0</u>

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

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)	<u>18.3</u>	<u>36.7</u>
# 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)	<u>10.3</u>	<u>25.7</u>
# 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)	<u>5.9</u>	<u>22.0</u>
# 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)	<u>14.7</u>	<u>40.3</u>
# 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)	<u>9.5</u>	<u>25.7</u>
# 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)	<u>11.0</u>	<u>22.0</u>
# of reimbursable K-12 evaluations		44
Avg. time p/ district reporting		15
Total Time (in minutes)		660
Per Hour		60
Hours Worked (Code 17)		<u>11.0</u>

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

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

District/COE: CUSD / D.O.

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 Statistical Data	Fiscal Year									
	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	05-06	06-07
1 A K-12 Probationary Teachers- Total Number										70
1 B K-12 Permanent Teachers- Total Number										456
1 C K-12 Temporary Teachers- Total Number										44
1 D K-12 Classroom Teachers- A + B + C = Total Number										570
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
3* K-12 Categorical/Grant Teachers- Total Number Evaluated										1
4 Reimbursable K-12 Evaluations Line 2 D subtract Line 3										380

*E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52176 LEP/Bilingual
 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
 U.S.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant- funded personnel

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 Patricia Delaney Date 10/4/07

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE: CUSD/CME

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 Statistical Data	Fiscal Year		
	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		9	
1 D K-12 Classroom Teachers- A + B+ C = Total Number		30	
2 A K-12 Probationary Teachers- Total Number Evaluated		2	
2 B K-12 Permanent Teachers- Total Number Evaluated		3	
2 C K-12 Temporary Teachers- Total Number Evaluated		9	
2 D K-12 Classroom Teachers- A + B+ C = Total Number Evaluated		14	
3* K-12 Categorical/Grant Teachers- Total Number Evaluated		0	
4 Reimbursable K-12 Evaluations- Line 2 D subtract Line 3		14	

*E.C. 52012 School Improvement E.C. 52065 Native American E.C. 52176 LEP/Bilingual
 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
 U.S.C. 25; 2604 Indian School Assistance Act Any state-federal-local grant-funded personnel

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 Leslie Harder Date 10/10/07

If you have any questions, please contact _____ at _____
 PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE: Carlsbad Unified / Dist office

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

Statistical Data: Certificate Staff on Unsatisfactory Status	Fiscal Year								
	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									0
B. Number of re-evaluations									0
6 Permanent Non-Instructors:	/	/	/	/	/	/	/	/	/
A. Number on unsatisfactory status									0
B. Number of re-evaluations									0
7 Reimbursable Re-evaluations 5 B + 6 B = Total									

Non-reimbursable re-evaluations (Do not include in the statistics above)

1. Any positions funded by these categoricals:

- E.C. 52012 School Improvement
- E.C. 52176 LEP/Bilingual
- E.C. 54425(b) Chapter 1 Federal compensatory education
- E.C. 54444.2 Migrant Children
- E.C. 62002.5 State Categorical
- E.C. 52065 Native American
- E.C. 52852 Coordinated Categorical
- E.C. 54724 Drop-out Prevention
- U.S.C. 25; 2604 Indian School Assistance Act

2. Any position that is grant-funded

3. Re-evaluations of temporary and long-term substitute teachers.

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 Mary Kuba Date 10-1-07

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

RECEIVED
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BY:

Schedule 2A
 Carlsbad Unified School District
 498/83 Stull Act - "Probationary" Teacher Evaluations
 Fiscal Years: 2006-2007
 Time Study

Purpose: To extrapolate average time spent by administrative staff evaluating probationary teachers.
 Source: SA 1.7-1-A Average Timesheets.
 Findings:

Schoolsite	Staff	*Activity Codes											
		11			12			13			14		
		A	B	C	A	B	C	A	B	C	A	B	C
Aviara Oaks Middle	Marg Watson	**160	**160		**120	**120		**120	**120		**200	**200	
Buena Vista	Jose DeAnda												
CHE	Leslie Harden	10	40	40	15	15					5	15	10
CHMS	Catrina Hancock	40	40	40	5	5	5				45	45	45
CVA	Keith Holley	30	30		30	30					**195	**195	
Hope	Rich Tubbs	10			5	5	5	5	5	10	10	15	15
Kelly	Robert Devich	30	30	20	80	80	80	80	**160	**160	**240	**240	**240
Pacific Rim	Gwenn Adams	10	15	15	10	15	10	10	15	15	10	15	15
Valley	Steve Ahle	10	10	10	**120	**120	**120	5	5	5	60	60	60
	Carolyn Millikin				15	15	15	12	12	12	12	12	12
Averages		22	23	21	20	23	24	24	23	7	9	10	8
Summation of criteria B and C		44	44	44	48	48	48	48	18	18	18	63	63
Averages to be used		20	40	40	20	45	45	45	15	15	15	60	60

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

Schedule 2A
 Carlsbad Unified School District
 498/83 Stull Act - "Probationary" Teacher Evaluations
 Fiscal Years: 2006-2007
 Time Study

Purpose: To extrapolate average time spent by administrative staff evaluating probationary teachers.
 Source: SA 1.7-1-A Average Timesheets.
 Findings:

Schoolsite	Staff	*Activity Codes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Middle	Marg Watson	**240	**240			30	30			30	30		
Buena Vista	Jose DeAnda		5	5	5								
CHE	Leslie Harden	5	15	15	10	5	10	10	5		30		
CHMS	Catina Hancock	20	20	20	20	40	40	40	40	5	5	5	5
CVA	Keith Holley	**150	**150			70	70			15			
Hope	Rich Tubbs	5	10	10	10	5	5	5	5	10	10	10	5
Kelly	Robert Devich	60	60	60	60	**210	**210	**210	**210	30	30	30	30
Pacific Rim	Gwenn Adams	10	15	15	10	10	15	15	10	0	0	0	0
Valley	Steve Ahle	30	30	30	30								
	Carolyn Millikin	12	12	12	12	18	18	18	18				
Averages		20	21	21	20	25	27	18	16	15	18	11	10
Summation of criteria B and C				42			44				15		
Averages to be used		20		40		25	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) **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.

CUSD
 District/COE
Marg Watson
 Employee Name
331-6100 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Department/Location AOM
 Exact Position Title Principal
 Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	1600	1600		
Code 12 Goals and objectives conference with instructor	120	120		
Code 13 Pre-observation conference with instructor	120	120		
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		

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 PLEASE USE BLUE INK

Employee Signature _____ Date 10-11-07
 If you have any questions, please contact _____, at 331-6100

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 implement each of the reimbursable activities for the mandated program.

CVSD
 District/COE _____

Department/Location BV 06-07

Employee Name _____

Exact Position Title _____

Telephone # _____
 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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

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			
	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		10	10	10
Code 14 Classroom observation of instructor		6 20	6 20	6 20
Code 15 Post-observation conference with instructor		5	5	5
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 [Signature] Date 10/2/07
 If you have any questions, please contact _____, at _____

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 implement each of the reimbursable activities for the mandated program.

District/COE CHSD Department/Location CHS
 Employee Name Leslie Harder Exact Position Title Principal

Telephone # _____ Work year length(circle) 12mo/11mo/10mo/hrly Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	-	0	-	-
Code 12	Goals and objectives conference with instructor	15	15	-	-
Code 13	Pre-observation conference with instructor	-	5	5	-
Code 14	Classroom observation of instructor	5	15	15	0
Code 15	Post-observation conference with instructor	5	15	15	0
Code 16	Final conference with instructor	5	10	10	5
Code 17	District Reporting	-	30	-	-

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 Leslie Harder Date 10/10/07
 If you have any questions, please contact _____ at _____

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 implement each of the reimbursable activities for the mandated program.

District/COE CUSD

Department/Location CHMS

Employee Name Catina Hancock

Exact Position Title Principal

Telephone # 331-6400 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06 06-07
 Circle the years for which you are responding

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	40	40	40	40
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	20	20	20	20
Code 16 Final conference with instructor	40	40	40	40
Code 17 District Reporting	5	5	5	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 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 [Signature] Date 10/10/07
 If you have any questions, please contact _____, at _____

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 implement each of the reimbursable activities for the mandated program.

District/COE CUSD

Department/Location CVA

Employee Name Keith Holley

Exact Position Title Director

Telephone # 331-5295 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	30	30		
Code 12	Goals and objectives conference with instructor	30	30		
Code 13	Pre-observation conference with instructor	5	5		
Code 14	Classroom observation of instructor	195	195		
Code 15	Post-observation conference with instructor	150	150		
Code 16	Final conference with instructor	70	70		
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 on your personal knowledge or information." This information is used for cost accounting purposes only.

PLEASE USE BLUE INK

RECEIVED
 JUN 15 2007

Employee Signature Keith Holley

Date 9-27-07

BY: _____, at 331-5295

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 implement each of the reimbursable activities for the mandated program.

Carlsbad
 District/COE

Hope
 Department/Location

Rich Tobbs
 Employee Name

Principal
 Exact Position Title

3315999 (12)mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06 06/07
 Circle the years for which you are responding

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
- 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

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			
		A	B	C	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	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	5	5
Code 17	District Reporting	10	10	10	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 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.

RECEIVED
 NOV 15 2007

Employee Signature Rich Tobbs

Date 9/24/07 at _____

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 implement each of the reimbursable activities for the mandated program.

CUSD
 District/COE

Department/Location KELLY SCHOOL

ROBERT DEVICH
 Employee Name

Exact Position Title PRINCIPAL

760/331-5800 12mo/11mo/10mo/hrlly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment

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			
	A	B	C	D
Code 11 Preparing for the evaluation	30	30	20	20
Code 12 Goals and objectives conference with instructor	80	80	80	80
Code 13 Pre-observation conference with instructor	160	160	160	160
Code 14 Classroom observation of instructor	240	240	240	240
Code 15 Post-observation conference with instructor	60	60	60	60
Code 16 Final conference with instructor	210	210	210	210
Code 17 District Reporting	30	30	30	30

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

ROBERT DEVICH
 Employee Signature

Date 10/10/07, at _____

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 implement each of the reimbursable activities for the mandated program.

Carlsbad USD
 District/COE
Gwen Adams
 Employee Name
331-6200 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Department/Location Pacific Rim
 Exact Position Title Assistant Prin.
 Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10	15	15	10
Code 12	Goals and objectives conference with instructor	10	15	15	10
Code 13	Pre-observation conference with instructor	10	15	15	10
Code 14	Classroom observation of instructor	10	15	15	10
Code 15	Post-observation conference with instructor	10	15	15	10
Code 16	Final conference with instructor	10	15	15	10
Code 17	District Reporting	0	0	0	0

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

NOV 15 2007
 Employee Signature Gwen Adams Date 10-5-07
 If you have any questions, please contact _____, at _____
 BY: _____; TO _____
 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 implement each of the reimbursable activities for the mandated program.

CUSD
 District/COE

Pacific Rim
 Department/Location

Steve Ahlu
 Employee Name

Principal
 Exact Position Title

331-6299 12mo 11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	10m	10m	10m	10m
Code 12	Goals and objectives conference with instructor	2h	2h	2h	2h
Code 13	Pre-observation conference with instructor	5m	5m	5m	5m
Code 14	Classroom observation of instructor	1h	1h	1h	1h
Code 15	Post-observation conference with instructor	30m	30m	30m	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 on your personal knowledge or information." This information is used for cost accounting purposes only.

RECEIVED

EMPLOYEE SIGNATURE: Steve Ahlu

Date 10-1-07, at _____

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 implement each of the reimbursable activities for the mandated program.

Carlsbad USD
 District/COE
Carolyn Millikin
 Employee Name

Department/Location Valley
 Exact Position Title

12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

00/01

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
- 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

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			
	A	B	C	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	12
Code 15 Post-observation conference with instructor	12	12	12	12
Code 16 Final conference with instructor	18	18	18	18
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.

NOV 15 2007
 BY: _____ Employee Signature _____ Date 9-24-07
 If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Purpose: To extrapolate average time spent by administrative staff evaluating permanent teachers.
 Source: SA 1.7-1-B Average Timesheets.
 Findings:

Schoolsite	Staff	*Activity Codes															
		11				12				13				14			
		A	B	C	D	A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Middle	Marg Watson																
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
CHE	Leslie Harden	10				15	15										
CHMS	Catina Hancock	20	20	20	20	5	5	5	5	5	5	0	0	0	45	45	45
CVA	Keith Holley	30	30			30	30			5	5			80	80		
Hope	Rich Tubbs	10				5	5	5	5	5	5	5	5	5	5	10	10
Kelly	Robert Devich	**100	**100	**100	**100	60	60	60	60	45	45	45	45	**420	**420	**420	**420
Pacific Rim	Gwenn Adams	15	10	10	10	15	10	15	10	10	10	10	10	10	10	10	10
Valley	Steve Ahle	10	10	10	10	**120	**120	**120	**120	5	5	5	5	5	60	60	60
	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		31				40				23				58			
Averages to be used		30				40				20				55			

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

Purpose: To extrapolate average time spent by administrative staff evaluating permanent teachers.
 Source: SA 1.7-1-B Average Timesheets.
 Findings:

Schoolsite	Staff	*Activity Codes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Middle	Marg Watson												
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
CHE	Leslie Harden	5	15	15	10	10	5	10	10	5	10	5	30
CHMS	Catina Hancock	10	10	10	10	20	20	20	20	20	5	5	5
CVA	Keith Holley	70	70			70	70						
Hope	Rich Tubbs	5	10	15	5	5	5	10	5	5	5	5	5
Kelly	Robert Devich	**100	**100	**100	**100	**200	**200	**200	**200	**200	30	30	30
Pacific Rim	Gwenn Adams	10	10	10	10	10	10	10	10				
	Steve Ahle	30	30	30	30								
Valley	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		38				36				15			
Averages to be used		30				20				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 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 spent (in minutes) by you to implement each of the reimbursable activities for the mandated program.

District/COE CUSD

Department/Location Aom

Employee Name Marg Watson

Exact Position Title Principal

Telephone # 331-6100 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	0	0		
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	0		
Code 17 District Reporting	0	0		

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 10-11-07
 if you have any questions, please contact _____, at 331-6100

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

SA 1.7-1-B

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.

Curtis
DISTRICT

Department/Location

Jose de Arda
Employee Name

Exact Position Title

Telephone # 12mo/11mo/10mo/hrly
Work year length(circle)

Fiscal Year: 87-88 88-89 89-90 00-01
01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

Number of activities code:

- 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

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			
	A	B	C	D
Code 11: Preparing for the evaluation	2.5	2.5	2.5	2.5
Code 12: Goals and objectives conference with instructor	2.5	2.5	2.5	2.5
Code 13: Pre-observation conference with instructor	2.5	2.5	2.5	2.5
Code 14: Classroom observation of instructor	2.5	12.5	2.5	2.5
Code 15: Post-observation conference with instructor	2.5	2.5	2.5	2.5
Code 16: Final conference with instructor	2.5	2.5	2.5	2.5
Code 17: District Reporting	1	1	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: [Signature]
If you have any questions, please contact _____

Date: 10/2/07 at 1/7/08

Resubmit to w/ additional change

PLEASE SUBMIT THIS INFORMATION BY _____ TO _____

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.

CVSD
 District/COE

Department/Location BV

06-07

Employee Name _____

Exact Position Title _____

Telephone # _____
 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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

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			
	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		10	10	10
Code 14 Classroom observation of instructor		20	20	20
Code 15 Post-observation conference with instructor		5	5	5
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 [Signature] Date 10/12/07
 If you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

Not Used - 50
 District submitted
 01-17-08 - [Signature]

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.

2150D
 District/COE
Leslie Harder
 Employee Name

Department/Location CHE
 Exact Position Title Principal

Telephone # _____
 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

- | | |
|---|---|
| Reimbursable Activities Codes: | Evaluation Criteria: |
| Code 11 Preparing for the evaluation | (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			
	A	B	C	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	-	5	5	-
Code 14 Classroom observation of instructor	5	15	15	10
Code 15 Post-observation conference with instructor	5	15	15	10
Code 16 Final conference with instructor	5	10	10	5
Code 17 District Reporting	-	30	-	-

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 Leslie Harder Date 10/10/07
 If you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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/COE CLUSD

Department/Location CHMS

Employee Name Catrina Hancock

Exact Position Title Principal

Telephone # 331-6400 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06 06-07
 Circle the years for which you are responding

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	20	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	10	10	10	10
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 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 Catrina Hancock Date 10/10/07
 If you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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/COE CUSD

Department/Location CVA

Employee Name Keith Holley

Exact Position Title Director

Telephone # _____
 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	30	30		
Code 12	Goals and objectives conference with instructor	30	30		
Code 13	Pre-observation conference with instructor	5	5		
Code 14	Classroom observation of instructor	80	80		
Code 15	Post-observation conference with instructor	70	70		
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 only on your personal knowledge or information." This information is used for cost accounting purposes only.

PLEASE USE BLUE INK

Employee Signature Keith Holley

Date 9-27-07

BY: _____, at 3315299

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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.

Cadiz
 District/COE

Hope
 Department/Location

Richard Tibbs
 Employee Name

Principal
 Exact Position Title

3315999 (12)mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06 06/07
 Circle the years for which you are responding

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
- 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

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			
		A	B	C	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

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: R. Tibbs Date: 7/24/07
 if you have any questions, please contact _____ at _____

BY: PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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/COE CUSD

Department/Location KELLY SCHOOL

Employee Name ROBERT DEVICH

Exact Position Title PRINCIPAL

Telephone # 760/331-5800 Work-year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	100	100	100	100
Code 12	Goals and objectives conference with instructor	60	60	60	60
Code 13	Pre-observation conference with instructor	45	45	45	45
Code 14	Classroom observation of instructor	420	420	420	420
Code 15	Post-observation conference with instructor	100	100	100	100
Code 16	Final conference with instructor	200	200	200	200
Code 17	District Reporting	30	30	30	30

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 [Signature] Date 10/10/07

By: _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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.

Carlsbad USD
 District/COE

Department/Location Pacific Rim

Sueann Adams
 Employee Name

Exact Position Title Assistant Prin.

331-6200 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	15	10	15	10
Code 12 Goals and objectives conference with instructor	15	10	15	10
Code 13 Pre-observation conference with instructor	10	10	10	10
Code 14 Classroom observation of instructor	10	10	10	10
Code 15 Post-observation conference with instructor	10	10	10	10
Code 16 Final conference with instructor	10	10	10	10
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
 NOV 15 2007
 Employee Signature Sueann Adams

Date 10-5-07

By _____, you have any questions, please contact _____ at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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
 District/COE

Pacific Rim
 Department/Location

Star Ahe
 Employee Name

Principal
 Exact Position Title

331-6291 (12mo)/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

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
- 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

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			
	A	B	C	D
Code 11 Preparing for the evaluation	10m	10m	10m	10m
Code 12 Goals and objectives conference with instructor	2h	2h	2h	2h
Code 13 Pre-observation conference with instructor	5m	5m	5m	5m
Code 14 Classroom observation of instructor	1h	1h	1h	1h
Code 15 Post-observation conference with instructor	30m	30m	30m	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 on your personal knowledge or information." This information is used for cost accounting purposes only.

RECEIVED
 NOV 15 2007

Employee Signature Star Ahe
 If you have any questions, please contact _____

Date 10-1-07 at _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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/COE CUSD

Department/Location Office Valley Middle

Employee Name Carolyn Millikin

Exact Position Title Principal

Telephone # 760 331-5300 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

06/07

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
- 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

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			
	A	B	C	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	12
Code 15 Post-observation conference with instructor	12	12	12	12
Code 16 Final conference with instructor	18	18	18	18
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 (and 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.

RECEIVED
 NOV 15 2007

PLEASE USE BLUE INK

Employee Signature Carolyn Millikin

Date 9-24-07

BY: If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Schedule 2C
 Carlsbad Unified School District
 498/83 Stull Act - "Temporary" Teacher Evaluations
 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:

Schoolsite	Staff	*Activity Codes															
		11				12				13				14			
		A	B	C	D	A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Middle	Marg Watson	**480	**480			**360	**480			**360	**360			**600	**600		
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	10	15	15					5	5	5	5	5	15	15	10
CHMS	Catina Hancock	40	40	40	40	5	5	5	5					60	60	60	60
CVA	Keith Holley	30	30			30	30			5	5			**195	**195		
Hope	Rich Tubbs	10				5	5	5	5	5	10	10	10	5	15	15	10
Kelly	Robert Devich	60	30	30	30	30	30	30	30					10	20	10	30
Pacific Rim	Gwenn Adams	10	15	40	40	10	15	30	30	10	15	30	30	10	15	30	30
Valley	Steve Ahle	10	10	10	10	**120	**120	**120	**120	5	5	5	5	60	60	60	60
	Carolyn Millikin					15	15	15	15	12	12	12	12	12	12	12	12
	J. Cesar Morales					5	25	25	5	10	25	25	10	10	20	20	20
Averages		27	23	30	30	14	18	18	15	8	13	17	12	22	27	28	29
Summation of criteria B and C		53				36				30				55			
Averages to be used		25				14				8				20			
		50				35				30				55			

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

Schedule 2C
 Carlsbad Unified School District
 498/83 Stull Act - "Temporary" Teacher Evaluations
 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:

Schoolsite	Staff	*Activity Codes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
Aviara Oaks Middle	Marg Watson	**720	**720			**90	**90			**90	**90		
Buena Vista	Jose DeAnda	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**2.5	**1	**1	**1	**1
CHE	Leslie Harden	5	15	15	10	5	10	10	5		30		
CHMS	Catrina Hancock	20	20	20	20	40	40	40	40	5	5	5	5
CVA	Keith Holley	**150	**150			**70	**70			15			
Hope	Rich Tubbs	5	10	10	10	5	5	5	5	10	10	10	10
Kelly	Robert Devich	10	10	10	10	15	15	15	15	10	10	10	10
Pacific Rim	Gwenn Adams	10	15	30	30	10	15	15	15				
Valley	Steve Ahle	30	30	30	30								
Rio Seco	Carolyn Millikin	12	12	12	12	18	18	18	18				
Averages	Cheryl Bowen	10	25	25	10	15	15	15	15	25	40	35	20
Summation of criteria B and C		13	17	19	17	15	17	17	16	13	19	15	11
Averages to be used		13	36	35		15	34	30		16	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
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.

CUSD
 District/COE

Department/Location Hom

Marg Watson
 Employee Name

Exact Position Title Principal

331-6100 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation	480	480		
Code 12	Goals and objectives conference with instructor	360	480		
Code 13	Pre-observation conference with instructor	360	360		
Code 14	Classroom observation of instructor	600	600		
Code 15	Post-observation conference with instructor	720	720		
Code 16	Final conference with instructor	90	90		
Code 17	District Reporting	90	90		

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 10-11-07
 If you have any questions, please contact _____, at 331-6100

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

SA 1.7-1-C

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 _____

Department/Location _____

Employee Name _____

Exact Position Title _____

Telephone # _____
Work year length(circle) 12mo/11mo/10mo/hrlly

Fiscal Year: 07-98 98-99 99-00 00-01
01-02 02-03 03-04 04-05 05-06
Circle the years for which you are responding

06-07

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
- 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

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			
		A	B	C	D
Code 11	Preparing for the evaluation.	2.5	2.5	2.5	2.5
Code 12	Goals and objectives conference with instructor	5	5	5	5
Code 13	Pre-observation conference with instructor	2.5	2.5	2.5	2.5
Code 14	Classroom observation of instructor	2.5	2.5	2.5	2.5
Code 15	Post-observation conference with instructor	2.5	2.5	2.5	2.5
Code 16	Final conference with instructor	2.5	2.5	2.5	2.5
Code 17	District Reporting	1	1	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: [Signature]

Date: 10/12/07 / 1/7/08

PLEASE SUBMIT THIS INFORMATION BY _____ TO _____ at _____

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 CUSD

Department/Location CHE

Employee Name Leslie Hardee

Exact Position Title Principal

Telephone # 3316300 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

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
- 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.

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			
	A	B	C	D
Code 11 Preparing for the evaluation. <u>10 min</u>	-	10	-	-
Code 12 Goals and objectives conference with instructor. <u>30 min</u>	15	15	-	-
Code 13 Pre-observation conference with instructor. <u>10 min</u>	-	5	5	-
Code 14 Classroom observation of instructor. <u>45 min</u>	5	15	15	10
Code 15 Post-observation conference with instructor. <u>30 min</u>	5	15	15	10
Code 16 Final conference with instructor. <u>30 min</u>	5	10	10	5
Code 17 District Reporting. <u>30 min</u>	-	30	-	-

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 Leslie Hardee Date 12/10/07
 If you have any questions, please contact _____ at _____

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.

District/COE CUSD

Department/Location 498/83

Employee Name Catrina Hancock

Exact Position Title

Telephone # 331-6400 Work year length(circle) 12mo/11mo/10mo/hrly

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

06-07

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
- 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.

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			
		A	B	C	D
Code 11	Preparing for the evaluation.	40	40	40	40
Code 12	Goals and objectives conference with instructor	5	5	5	5
Code 13	Pre-observation conference with instructor	N/A			
Code 14	Classroom observation of instructor	60	60	60	60
Code 15	Post-observation conference with instructor	20	20	20	20
Code 16	Final conference with instructor	40	40	40	40
Code 17	District Reporting	5	5	5	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 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 Catrina Hancock Date 10/10/07
 If you have any questions, please contact _____ at _____

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.

CUSD
 District/COE

Department/Location CVA

Keith Halley
 Employee Name

Exact Position Title Director

331-5200 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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.

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			
		A	B	C	D
Code 11	Preparing for the evaluation.	30 ^{min}	30		
Code 12	Goals and objectives conference with instructor	30 ^{min}	30		
Code 13	Pre-observation conference with instructor	5 ^{min}	5		
Code 14	Classroom observation of instructor	195 ^{min}	195 ^{min}		
Code 15	Post-observation conference with instructor	150 ^{min}	150 ^{min}		
Code 16	Final conference with instructor	70 ^{min}	70 ^{min}		
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 on your personal knowledge or information." This information is used for cost accounting purposes only.

RECEIVED
 Employee Signature Keith Halley
 If you have any questions, please contact Keith Halley

Date 9-27-07 at 331-5295

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.

Carlsbad
 District/COE

Department/Location

Richard Tibbs
 Employee Name

Exact Position Title

3315999
 Telephone #

12mo/11mo/10mo/hrly
 Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01

01-02 02-03 03-04 04-05 05-06 06/07

Circle the years for which you are responding

Reimbursable Activities Codes:

Evaluation Criteria:

- 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
- (D) suitable learning environment.

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			
		A	B	C	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	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	5	5
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 your personal knowledge or information." This information is used for cost accounting purposes only.

PLEASE USE BLUE INK

NOV 15 2007
 Employee Signature Richard Tibbs

Date 9/24/07

If you have any questions, please contact _____, at _____

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.

CUSD
 District/COE

Department/Location WELLY SCHOOL

ROBERT DEVICH
 Employee Name

Exact Position Title PRINCIPAL

760/331-5800 (12mo/11mo/10mo/hrly)
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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.

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			
		A	B	C	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 instructor		30	30	
Code 14	Classroom observation of instructor	10	20	10	30
Code 15	Post-observation conference with instructor	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 your personal knowledge or information." This information is used for cost accounting purposes only.

PLEASE USE BLUE INK

NOV 15 2007
 Employee Signature _____
 If you have any questions, please contact _____

Date 10-10-07, at _____

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.

Carlsbad Unified
 District/COE

Department/Location Pacific Rim

Gwenn Adams
 Employee Name

Exact Position Title A. Principal

331-6200 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06
 Circle the years for which you are responding

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
- 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.

CLASSROOM TEACHER TIME IS NOT REIMBURSED

eval

Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:	Average Time in Minutes			
	A	B	C	D
Code 11 Preparing for the evaluation.	10	15	40	40
Code 12 Goals and objectives conference with instructor	10	15	30	30
Code 13 Pre-observation conference with instructor	10	15	30	30
Code 14 Classroom observation of instructor	10	15	30	30
Code 15 Post-observation conference with instructor	10	15	30	30
Code 16 Final conference with instructor	10	15	15	15
Code 17 District Reporting	0		0	0

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 Gwenn Adams

Date 10-5-07

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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.

CUSD
 District/COE

Pacific Rm
 Department/Location

Steve Ahl
 Employee Name

Principal
 Exact Position Title

331-6299 (12mo)/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

Circle the years for which you are responding

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
- 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.

CLASSROOM TEACHER TIME IS NOT REIMBURSED

eval.

Allocate the average time spent on each criterion (A-D) for each of the following evaluation steps:		Average Time in Minutes			
		A	B	C	D
Code 11	Preparing for the evaluation.	10m	10m	10m	10m
Code 12	Goals and objectives conference with instructor	2h	2h	2h	2h
Code 13	Pre-observation conference with instructor	5m	5m	5m	5m
Code 14	Classroom observation of instructor	1h	1h	1h	1h
Code 15	Post-observation conference with instructor	30m	30m	30m	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 on your personal knowledge or information." This information is used for cost accounting purposes only.

RECEIVED
 NOV 15 2007

PLEASE USE BLUE INK

Employee Signature [Signature]

Date 10-1-07

BY _____, at _____

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.

Carlsbad USD
 District/COE

Valley HS
 Department/Location

Carolyn Millikin
 Employee Name

Principal
 Exact Position Title

331-5300 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06

06/07

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
- 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.

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			
		A	B	C	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	12
Code 15	Post-observation conference with instructor	12	12	12	12
Code 16	Final conference with instructor	18	18	18	18
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.

RECEIVED
 NOV 15 2007

Carolyn Millikin
 Employee Signature

9-24-07
 Date

BY: _____, at _____

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.

Carlsbad Unified
 District/COE

Valley Middle School
 Department/Location

A. Cesar Morales
 Employee Name

Assistant Principal
 Exact Position Title

760-771-5388 12mo/11mo/10mo/hrly
 Telephone # Work year length(circle)

Fiscal Year: 97-98 98-99 99-00 00-01
 01-02 02-03 03-04 04-05 05-06 06/07
 Circle the years for which you are responding

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
- 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.

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			
		A	B	C	D
Code 11	Preparing for the evaluation				
Code 12	Goals and objectives conference with instructor	5	25	25	5
Code 13	Pre-observation conference with instructor	10	25	25	10
Code 14	Classroom observation of instructor	10	20	20	20
Code 15	Post-observation conference with instructor	10	25	25	10
Code 16	Final conference with instructor	15	15	15	15
Code 17	District Reporting	25	40	35	20

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 [Signature] Date 10-2-2007 at _____
 If you have any questions, please contact _____, at _____

RECEIVED
 15 2007
 BY: _____

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		05-06	06-07
(J. Cesar Morales)	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
CAMPBELL, BETTY J	SPECIAL PROJECTS COORDINATOR	\$ 18.95	\$ 20.30
CHIRICETTI, DONNA	HEALTH TECHNICIAN	\$ 23.91	\$ 24.15
CHRISMAN, KARL ROBERT	PRINCIPAL - HOPE	\$ 69.79	LEFT DISTRICT
CHRISTIAN, MARY	ADMINISTRATIVE ASSISTANT	\$ 26.24	\$ 27.31
CISNEROS, LAURA	OFFICE ASSISTANT	\$ 19.64	\$ 11.46

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		05-06	06-07
CONNALLY, KATHY	LIBRARY TECHNICIAN	\$ 21.68	\$ 23.00
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

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		05-06	06-07
GLENN, SUSAN	ADMIN SECRETARY	\$ 31.24	\$ 31.55
GOELTZ, KATHY	PSYCHOLOGIST	\$ 45.35	\$ 50.41
GONZALES, ALICE (JEAN)	ADMIN SECRETARY	\$ 23.35	\$ 23.58
GUNZELMAN, CATHY	OFFICE ASSISTANT	\$ 18.69	\$ 18.89
HANCOCK, CATINA	ASSISTANT PRINCIPAL	\$ 59.53	\$ 61.91
HANSEN, JUDITH	ADMINISTRATIVE SECRETARY	\$ 23.35	\$ 24.77
HANSEN, ROSE MARIE	ATTENDANCE CLERK	\$ 20.13	\$ 20.34
HANSEN, SUSAN	INSTRUCTIONAL AIDE	\$ 18.69	\$ 18.89
HARPER, DONNA	DIRECTOR, PURCHASING & STRS	\$ 54.96	\$ 60.96
HARTMAN, JANE	ASSISTANT PRINCIPAL (TEACHER ON SP. ASSIGN.)	\$ 55.48	\$ 64.99
HETRICK, LINDY	ADMINISTRATIVE SECRETARY	\$ 24.51	\$ 26.00
HOLLEY, NORMAN /KEITH	PRINCIPAL	\$ 73.27	\$ 76.21
HOWARD, TINA IRENE	ASSISTANT PRINCIPAL	\$ 59.53	\$ 61.91
JACKSON, DEBRA	ADMINISTRATIVE SECRETARY	\$ 22.24	LEFT DISTRICT
JENNINGS, DIANE	ADMIN ASSISTANT	\$ 30.50	\$ 30.80
JIMENO, ALICE	ADMINISTRATIVE SECRETARY	\$ 25.75	\$ 26.00
KALK, DAVE	ASSISTANT PRINCIPAL	\$ 44.22	\$ 58.50
KRYZAK, JENNIFER	HEALTH TECHNICIAN	\$ 19.67	\$ 20.86
KUHN, MARY	ADMINISTRATIVE SECRETARY-CONFIDENTIAL	\$ 30.46	\$ 31.98

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		05-06	06-07
LANE, KIM	HEALTH TECHNICIAN	\$ 23.91	\$ 24.15
LARSON, JENNIFER	HEALTH TECHNICIAN	\$ 25.11	\$ 25.36
LARSON, LESLIE	HEALTH TECHNICIAN	\$ 21.68	\$ 21.90
LEWIS, RICK	DIRECTOR, INFORMATION SYSTEMS	\$ 62.28	\$ 68.58
LORD, WILLIS (BILL)	ASSISTANT PRINCIPAL	\$ 64.57	\$ 68.95
LUTZ, CINDY	HEALTH TECHNICIAN	\$ 21.68	\$ 21.90
MADDOX, SHEILA	PRINCIPAL	\$ 69.79	\$ 72.58
MARTINEZ, PAUL	MAINTENANCE III	\$ 34.50	\$ 34.85
McCORMAC, KATHRYN	LEAD ACCOUNTANT	\$ 33.68	\$ 37.14
McCORMICK, LAURA JEAN	OFFICE ASSISTANT	\$ 16.96	\$ 17.99
MERCHANT, SHARAN	IS SPECIALIST	\$ 33.50	\$ 34.85
MILLIKIN, CAROLYN	PRINCIPAL-VALLEY	\$ 73.27	\$ 76.21
MONDERINE, ROSEMARY	PURCHASING AGENT	\$ 32.06	\$ 32.38
NAVARRO, NANCY	DIRECTOR, DIST FINANCIAL SERVICES	\$ 69.61	\$ 76.21
NORTON, TORRIE	ASSISTANT SUPERINTENDENT- PERSONNEL	\$ 81.30	\$ 94.20
O'CONNELL, SUZANNE	ASSISTANT SUPERINTENDENT- INSTRUCTIONAL	\$ 81.30	\$ 94.20
OGAN, LAURA	ATTENDANCE CLERK	\$ 20.13	\$ 20.34
OHLIN, VANGIE	ADMINISTRATIVE ASSISTANT	\$ 18.66	\$ 20.34
PFRANG, SHARON	OFFICE ASSISTANT	\$ 18.15	\$ 18.89

SixTen and Associates

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:		
		05-06	06-07	
SHINTO, DEBRA	ACCT TECHNICIAN	\$ 23.93	\$ 25.39	
SIMS, CYNTHIA	ADMIN SECRETARY	\$ 23.35	\$ 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	

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		05-06	06-07
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

California Department of Education - School Fiscal Services Division
Restricted Indirect Cost Rates for K-12 Local Educational Agencies - Five Year Listing

Approved March 2006 by CDE based on SACS expenditure data)
 Address questions to sacsinfo@cde.ca.gov, or call (916) 322-1770.

					APPROVED RATES				
					For use with state and federal programs, as allowable, in:				
Co.	CDS	Type*	Name (sorted by CDS code)	2002-03 <small>(based on 2000-01 expenditure data)</small>	2003-04 <small>(based on 2001-02 expenditure data)</small>	2004-05 <small>(based on 2002-03 expenditure data)</small>	2005-06 <small>(based on 2003-04 expenditure data)</small>	2006-07 <small>(based on 2004-05 expenditure data)</small>	
37	10371	C	San Diego County Superintendent						
37	67967	D	Alpine Union Elementary	8.11%	8.05%	9.84%	8.54%	8.22%	
37	67975	D	Bonsall Union Elementary	2.86%	3.46%	3.50%	3.16%	2.99%	
37	67983	D	Borrego Springs Unified	4.86%	4.15%	4.54%	4.41%	4.71%	
37	67991	D	Cajon Valley Union Elementary	8.30%	5.40%	6.07%	8.52%	7.95%	
37	68007	D	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	D	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	D	Del Mar Union Elementary	3.36%	7.82%	7.45%	5.62%	5.92%	
37	68080	D	Encinitas Union Elementary	4.67%	2.44%	5.42%	6.00%	2.98%	
37	68098	D	Escondido Union Elementary	5.00%	4.57%	6.33%	5.04%	5.22%	
37	68106	D	Escondido Union High	4.68%	4.69%	5.75%	4.97%	4.21%	
37	68114	D	Fallbrook Union Elementary	6.22%	9.05%	10.22%	8.07%	7.20%	
37	68122	D	Fallbrook Union High	7.61%	5.46%	6.11%	6.69%	5.76%	
37	68130	D	Grossmont Union High	7.15%	10.46%	11.10%	10.32%	7.90%	
37	68155	D	Jamul-Dulzura Union Elementary	1.56%	3.41%	4.68%	5.70%	5.03%	
37	68163	D	Julian Union Elementary	7.47%	4.34%	1.28%	4.56%	5.43%	
37	68171	D	Julian Union High	5.73%	6.57%	9.26%	6.16%	1.61%	
37	68189	D	Lakeside Union Elementary	11.04%	8.04%	4.37%	5.35%	11.14%	
37	68197	D	La Mesa-Spring Valley Elementary	6.14%	9.03%	8.91%	7.63%	6.49%	
37	68205	D	Lemon Grove Elementary	3.35%	3.01%	3.14%	3.64%	4.17%	
37	68213	D	Mountain Empire Unified	7.38%	9.96%	11.53%	10.06%	9.47%	
37	68221	D	National Elementary	6.39%	5.11%	6.20%	5.68%	6.57%	
37	68296	D	Poway Unified	5.73%	6.32%	6.18%	5.85%	5.94%	
37	68304	D	Ramona City Unified	4.53%	5.00%	5.17%	5.19%	5.55%	
37	68312	D	Rancho Santa Fe Elementary	5.99%	4.66%	6.62%	7.67%	6.74%	
37	68338	D	San Diego City Unified	5.33%	6.59%	8.29%	11.03%	9.99%	
37	68346	D	San Dieguito Union High	2.30%	3.19%	3.58%	5.83%	3.67%	
37	68353	D	San Pasqual Union Elementary	5.35%	6.29%	6.54%	7.45%	8.12%	
37	68361	D	Santee Elementary	9.39%	4.72%	5.01%	5.82%	0.32%	
37	68379	D	San Ysidro Elementary	7.87%	4.72%	5.14%	7.06%	6.98%	
37	68387	D	Solana Beach Elementary	4.35%	5.42%	4.89%	5.58%	5.94%	
37	68395	D	South Bay Union Elementary	7.90%	6.01%	8.15%	11.18%	9.01%	
37	68403	D	Spencer Valley Elementary	5.90%	4.54%	6.11%	6.15%	6.90%	
37	68411	D	Sweetwater Union High	14.49%	16.09%	15.10%	15.98%	12.57%	
37	68437	D	Vallecitos Elementary	4.15%	6.06%	4.99%	4.63%	4.75%	
37	68452	D	Vista Unified	8.50%	7.47%	8.49%	3.65%	5.56%	
37	73551	D	Carlsbad Unified	3.15%	4.09%	4.57%	4.61%	3.61%	
37	73569	D	Oceanside Unified	5.70%	5.03%	5.73%	5.83%	6.48%	
37	73791	D	San Marcos Unified	5.06%	4.15%	4.53%	4.44%	4.32%	
37	75416	D	Warner Unified	3.21%	4.45%	4.07%	3.16%	3.74%	
37	75614	D	Valley Center-Pauma Unified	1.33%	5.26%	6.17%	7.42%	10.93%	
				2.01%	1.07%	5.89%	7.98%	6.32%	

* C = County Office of Education
 D = District
 J = Joint Powers Agency
 CA = Common Administration

Fiscal Year

2005 - 2006

337

Sixten 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

Sacramento
3841 North Freeway Blvd., Suite 170
Sacramento, CA 95834
Telephone: (916) 565-6104
Fax: (916) 564-6103

Claim File Copy

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

CLAIM FOR PAYMENT Pursuant to Government Code Section 17561. THE STULL ACT	For State Controller Use Only (19) Program Number 00260 (20) Date Filed ___/___/___ (21) LRS Input ___/___/___	Program 260
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(01) Claimant Identification Number: S37030	Reimbursement Claim Data																	
(02) Claimant Name: Carlsbad Unified School District	(22) SA-1, (03)(A)(f)	300																
County of Location: San Diego	(23) SA-1, (03)(B)(f)																	
Street Address: 6225 El Camino Real	(24) SA-1, (03)(A)(1)(a)(f)	25,740																
City: Carlsbad State: CA Zip Code: 92009	(25) SA-1, (03)(A)(1)(b)(f)	48,662																
<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th style="width: 20%;">Type of Claim</th> <th style="width: 20%;">Estimated Claim</th> <th style="width: 20%;">Reimbursement Claim</th> <th style="width: 40%;"></th> </tr> <tr> <td>(03) Estimated</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>(09) Reimbursement</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>(04) Combined</td> <td style="text-align: center;"><input type="checkbox"/></td> <td>(10) Combined</td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>(05) Amended</td> <td style="text-align: center;"><input type="checkbox"/></td> <td>(11) Amended</td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </table>	Type of Claim	Estimated Claim	Reimbursement Claim		(03) Estimated	<input checked="" type="checkbox"/>	(09) Reimbursement	<input checked="" type="checkbox"/>	(04) Combined	<input type="checkbox"/>	(10) Combined	<input type="checkbox"/>	(05) Amended	<input type="checkbox"/>	(11) Amended	<input type="checkbox"/>	(26) SA-1, (03)(A)(2)(a)(f)	12,558
Type of Claim	Estimated Claim	Reimbursement Claim																
(03) Estimated	<input checked="" type="checkbox"/>	(09) Reimbursement	<input checked="" type="checkbox"/>															
(04) Combined	<input type="checkbox"/>	(10) Combined	<input type="checkbox"/>															
(05) Amended	<input type="checkbox"/>	(11) Amended	<input type="checkbox"/>															
		(27) SA-1, (03)(A)(2)(b)(f)	12,558															
		(28) SA-1, (03)(B)(1)(a)(f)																
		(29) SA-1, (03)(B)(1)(b)(f)																
Fiscal Year of cost: (06) 2006-2007	(12) 2005-2006	(30) SA-1, (03)(B)(1)(c)(f)																
Total Claimed Amount: (07) \$ 115,700	(13) \$ 105,192	(31) SA-1, (03)(B)(1)(d)(f)																
Less: 10% Late Penalty	(14) \$ -	(32) SA-1, (03)(B)(1)(e)(f)																
Less: Prior Claim Payment Received	(15) \$ -	(33) SA-1, (05)	6															
Net Claimed Amount	(16) \$ 105,192	(34) SA-1, (06)	5,674															
Due from State: (08) \$ 115,700	(17) \$ 105,192	(35) SA-1, (08)																
Due to State	(18)	(36) SA-1, (09)																

(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

Walter Freeman 12/18/06

Walter Freeman Assistant Superintendent, Business Services

Type or Print Name Title

(38) Name of Contact Person for Claim Telephone Number: (858) 514-8605

SixTen and Associates E-mail Address: kbpsixten@aol.com

Program 260	MANDATED COSTS THE STULL ACT CLAIM SUMMARY	FORM SA-1
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(01) Claimant: Carlsbad Unified School District	(02) Type of Claim: Reimbursement <input checked="" type="checkbox"/> Estimated <input type="checkbox"/>	Fiscal Year: 2005-2006
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Direct Costs	Object Accounts					
(03) Reimbursable Components	(a) Salaries and Benefits	(b) Materials and Supplies	(c) Contract Services	(d) Fixed Assets	(e) Travel and Training	(f) Total
A. Certificated Instructional Employees (CIE)	Claim Statistics: Number of CIE's evaluated per (03)(A)(1) and (03)(A)(2)					300
1. Evaluate and assess performance	Ed. Code §44662, subd. (b), as amended by Ch. 498/83; Reimbursement period begins fy 1997-98					
a. Review employee's techniques and strategies	\$ 23,546.25	\$ -	\$ -	\$ -	\$ 2,193.34	\$ 25,739.59
b. Evaluation to include assessment of techniques and strategies	\$ 48,662.25	\$ -	\$ -	\$ -	\$ -	\$ 48,662.25
2. Evaluate and assess CIE who teach certain subjects	Ed. Code §44662, subd. (b), as amended by Ch. 4/99; Reimbursement period begins 03/15/99					
a. Review STAR results	\$ 12,558.00	\$ -	\$ -	\$ -	\$ -	\$ 12,558.00
Assessment based on STAR results	\$ 12,558.00	\$ -	\$ -	\$ -	\$ -	\$ 12,558.00
B. CIE and NIE Employees	Claim Statistics: Number of CIE's and NIE's evaluated per (03)(B)(1)					
1. Evaluate and assess CIE and NIE employees	Ed. Code §44664, subd. (b), as amended by Ch. 498/83; Reimbursement period begins fy 1997-98					
a. Evaluating and assessing CIE according to certain criteria	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
b. Reducing evaluation to writing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
c. Transmitting evaluation to CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
d. Attaching response to personnel file	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
e. Discussing evaluation with CIE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
(04) Total Direct Costs	\$ 97,324.50	\$ -	\$ -	\$ -	\$ 2,193.34	\$ 99,517.84

Indirect Costs	
(5) Indirect Cost Rate	[From J-380 or J-580] 5.83%
(6) Total Indirect Costs	[Line (05) x line (04)(a)] \$ 5,674.02
(7) Total Direct and Indirect Costs	[Line (04)(f) + line (06)] \$ 105,191.86

Cost Reduction	
(8) Offsetting Savings	\$ -
(9) Less: Other Reimbursements	\$ -
(0) Total Claimed Amount	[Line (07) - {Line (08) + Line (09)}] \$ 105,191.86

Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM SA-2
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(01) Claimant C. Lad Unified School District	(02) Fiscal Year 2005-2006
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(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

A. CIE	<input checked="" type="checkbox"/>	Review employee's techniques and strategies	<input type="checkbox"/>	Evaluation to include assessment of techniques and strategies		
	<input type="checkbox"/>	Review STR Results	<input type="checkbox"/>	Assessment based on STR results		
B. CIE & NIE	<input type="checkbox"/>	Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/>	Reducing evaluation to writing	<input type="checkbox"/>	Transmitting evaluation to CIE
	<input type="checkbox"/>	Attaching response to personnel file	<input type="checkbox"/>	Discussing evaluation with CIE		

(04) Description of Expenses			Object Accounts				
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Preparing to evaluate and assess the performance of a CIE Administrators Various	\$62.79	150.0	\$ 9,418.50				
Discussing the CIE's goals and objectives Administrators Various	\$62.79	125.0	\$ 7,848.75				
Pre-observation conference and discussion with CIE Administrators Various	\$62.79	100.0	\$ 6,279.00				
Attendance at training required to perform evaluations							
Ahle, Stephen Principal	\$73.27	4.0					\$ 293.08
Chrisman, Karl Robert Principal	\$69.79	4.0					\$ 279.16
DeAnda, Jose Principal	\$73.27	3.0					\$ 219.81
Devich, Robert Principal	\$69.79	4.0					\$ 279.16
Maddox, Shella Principal	\$69.79	3.0					\$ 209.37
Millikin, Carolyn Principal	\$73.27	3.0					\$ 219.81
Tubbs, Richard Assistant Principal	\$54.61	3.0					\$ 163.83
Watson, Margaret Principal	\$66.14	8.0					\$ 529.12

(05) Total	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	Page 1 of 1	\$ 23,546.25	\$ -	\$ -	\$ -	\$ 2,193.34
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Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM SA-2
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(01) Claimant C. ... ad Unified School District	(02) Fiscal Year 2005-2006
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(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

A. CIE

<input type="checkbox"/> Review employee's techniques and strategies	<input checked="" type="checkbox"/> Evaluation to include assessment of techniques and strategies
<input type="checkbox"/> Review STR Results	<input type="checkbox"/> Assessment based on STR results

B. CIE & NIE

<input type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing	<input type="checkbox"/> Transmitting evaluation to CIE
<input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Discussing evaluation with CIE	

(04) Description of Expenses	Object Accounts						
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
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				
Including evaluation to writing, forward to personnel file Administrators Various	\$62.79	175.0	\$ 10,988.25				

(05) Total	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	Page 1 of 1	\$ 48,662.25	\$ -	\$ -	\$ -	\$ -
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MANDATED COSTS
THE STULL ACT
COMPONENT/ACTIVITY COST DETAIL

Program
260

FORM
 SA-2

(01) Claimant: **Cad Unified School District** (02) Fiscal Year: **2005-2006**

(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

A. CIE

Review employee's techniques and strategies Evaluation to include assessment of techniques and strategies

Review STR Results Assessment based on STR results

B. CIE & NIE

Evaluating and assessing CIE according to certain criteria Reducing evaluation to writing Transmitting evaluation to CIE

Attaching response to personnel file Discussing evaluation with CIE

(04) Description of Expenses			Object Accounts				
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assets	(h) Travel and Training
Preparing to evaluate and assess the performance of a CIE Administrators Various	\$62.79	100.0	\$ 6,279.00				
Discussing the CIE's goals and objectives Administrators Various	\$62.79	50.0	\$ 3,139.50				
Pre-observation conference and discussion with CIE Administrators Various	\$62.79	50.0	\$ 3,139.50				

(05) Total Subtotal Page 1 of 1 \$ 12,558.00 \$ - \$ - \$ - \$ -

Program 260	MANDATED COSTS THE STULL ACT COMPONENT/ACTIVITY COST DETAIL	FORM SA-2
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Claimant Lead Unified School District	(02) Fiscal Year 2005-2006
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(03) Reimbursable Components: Check only **one** box per form to identify the component being claimed.

A. CIE

<input type="checkbox"/> Review employee's techniques and strategies	<input type="checkbox"/> Evaluation to include assessment of techniques and strategies
<input type="checkbox"/> Review STR Results	<input checked="" type="checkbox"/> Assessment based on STR results

B. CIE & NIE

<input type="checkbox"/> Evaluating and assessing CIE according to certain criteria	<input type="checkbox"/> Reducing evaluation to writing	<input type="checkbox"/> Transmitting evaluation to CIE
<input type="checkbox"/> Attaching response to personnel file	<input type="checkbox"/> Discussing evaluation with CIE	

(04) Description of Expenses				Object Accounts			
(a) Employee Names, Job Classifications, Functions Performed, and Description of Expenses	(b) Hourly Rate or Unit Cost	(c) Hours Worked or Quantity	(d) Salaries and Benefits	(e) Materials and Supplies	(f) Contract Services	(g) Fixed Assels	(h) Travel and Training
Classroom observation to evaluate and assess performance Administrators Various	\$62.79	100.0	\$ 6,279.00				
Post-observation conference and discussion with CIE Administrators Various	\$62.79	50.0	\$ 3,139.50				
Discussing evaluation and write-up with CIE Administrators Various	\$62.79	50.0	\$ 3,139.50				

(05) Total	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	Page 1 of 1	\$ 12,558.00	\$ -	\$ -	\$ -	\$ -
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Date	Hours	Employee Name	Title	PHR	Salary	Activity	Component
05-06	100.00	Administrators	Various	\$62.79	\$6,279.00	Preparing to evaluate and assess the performance of a CIE	Review STAR results
05-06	50.00	Administrators	Various	\$62.79	\$3,139.50	Discussing the CIE's goals and objectives	Review STAR results
05-06	50.00	Administrators	Various	\$62.79	\$3,139.50	Pre-observation conference and discussion with CIE	Review STAR results
05-06	100.00	Administrators	Various	\$62.79	\$6,279.00	Classroom observation to evaluate and assess performance	Assessment based on STAR results
05-06	50.00	Administrators	Various	\$62.79	\$3,139.50	Post-observation conference and discussion with CIE	Assessment based on STAR results
05-06	50.00	Administrators	Various	\$62.79	\$3,139.50	Discussing evaluation and write-up with CIE	Assessment based on STAR results
05-06	150.00	Administrators	Various	\$62.79	\$9,418.50	Preparing to evaluate and assess the performance of a CIE	Review employee's techniques and strategies
05-06	125.00	Administrators	Various	\$62.79	\$7,848.75	Discussing the CIE's goals and objectives	Review employee's techniques and strategies
05-06	100.00	Administrators	Various	\$62.79	\$6,279.00	Pre-observation conference and discussion with CIE	Review employee's techniques and strategies
05-06	325.00	Administrators	Various	\$62.79	\$20,406.75	Classroom observation to evaluate and assess performance	Evaluation to include assessment of techniques and strategies
05-06	150.00	Administrators	Various	\$62.79	\$9,418.50	Post-observation conference and discussion with CIE	Evaluation to include assessment of techniques and strategies
05-06	125.00	Administrators	Various	\$62.79	\$7,848.75	Discussing evaluation and write-up with CIE	Evaluation to include assessment of techniques and strategies
05-06	175.00	Administrators	Various	\$62.79	\$10,988.25	Reducing evaluation to writing, forward to personnel file	Evaluation to include assessment of techniques and strategies
	1,550.00	Administrators Total			\$97,324.50		
10/25/2005	4.00	Ahle, Stephen	Principal	\$73.27	\$293.08	Attendance at training required to perform evaluations	Review employee's techniques and strategies
10/25/2005	4.00	Ahle, Stephen Total			\$293.08		
10/25/2005	4.00	Chrisman, Karl Robert	Principal	\$69.79	\$279.16	Attendance at training required to perform evaluations	Review employee's techniques and strategies
10/25/2005	4.00	Chrisman, Karl Robert Total			\$279.16		
10/25/2005	3.00	DeAnda, Jose	Principal	\$73.27	\$219.81	Attendance at training required to perform evaluations	Review employee's techniques and strategies
10/25/2005	3.00	DeAnda, Jose Total			\$219.81		
10/25/2005	4.00	Devich, Robert	Principal	\$69.79	\$279.16	Attendance at training required to perform evaluations	Review employee's techniques and strategies
10/25/2005	4.00	Devich, Robert Total			\$279.16		
10/25/2005	3.00	Maddox, Sheila	Principal	\$69.79	\$209.37	Attendance at training required to perform evaluations	Review employee's techniques and strategies
10/25/2005	3.00	Maddox, Sheila Total			\$209.37		
10/25/2005	3.00	Millikin, Carolyn	Principal	\$73.27	\$219.81	Attendance at training required to perform evaluations	Review employee's techniques and strategies
10/25/2005	3.00	Millikin, Carolyn Total			\$219.81		
10/25/2005	3.00	Tubbs, Richard	Assistant Principa	\$54.61	\$163.83	Attendance at training required to perform evaluations	Review employee's techniques and strategies
10/25/2005	3.00	Tubbs, Richard Total			\$163.83		
10/25/2005	8.00	Watson, Margaret	Principal	\$66.14	\$529.12	Attendance at training required to perform evaluations	Review employee's techniques and strategies
10/25/2005	8.00	Watson, Margaret Total			\$529.12		
	1,582.00	Grand Total			\$99,517.84		

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

District/COE: CUSD Fiscal Year: 08-09
Steve STEVE AHLE Principal
 Employee Name Exact Position Title
ORR 331-6299
 Department/Location Telephone # 12mo/11mo/10mo/hry
 Work year length(circle)

Reimbursable Activities Codes:

- Code 31:** Training evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.
- Code 32:** Evaluator trainees: Time spent by district staff to attend training, conducted by the district or any other source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, repeat training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
10/29/05	31 32	FISK Training	4	N
1 1	31 32			
1 1	31 32			
1 1	31 32			
1 1	31 32			
1 1	31 32			
1 1	31 32			
1 1	31 32			

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 [Signature] Date 10-5-05

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

FRISK

SA 1.7-3

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

District/COE CUSD Fiscal Year: 05-06

Type of Training Activity FRISK

Training Location SDCOE HOPE

Date of Activity 9/11/06 10/25/05

Start and End Times 8 - 12:00

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Bob Chrisman	principal	Hope Elem	Trainer <u>Trainee</u>
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 the training curriculum or attach copy of agenda and materials:
FRISK

The 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

Employee Signature [Signature] Date _____

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

SA 1.6 -3

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

District/COE: CUSD Fiscal Year: 05-06
Employee Name: Jose De Anda Exact Position Title: Principal
Department/Location: B.V. Telephone #: 331-5499 Work year length(circle): 12mo/11mo/10mo/hrly

- Reimbursable Activities codes:**
- Code 31** Trainin evaluators: Time spent by district staff preparing and conducting training of district staff on how to perform the reimbursable certificated employee evaluations.
 - Code 32** Evalua r trainees: Time spent by district staff to attend training, conducted by the district or any her source, on how to perform the reimbursable certificated employee evaluations. Each trainee can be reimbursed only once for the same training course, that is, rep t training is not reimbursed.

Classroom teacher time is not reimbursed unless separately compensated to attend training.
NOTE: Only one code entry per line.

Date:	Activity Code (circle one):	Describe the activity:	Time in Hours	Substitutes & Materials cost
10/25/05	31 (32)	FRISK Training	3	? District Pd. for this training
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			
1/1	31 32			

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: [Signature] Date: 2/23/06
If you have any questions please contact _____ at _____
PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

Frisk Counts

SA 1.7-3

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

District/COE CUSD/ SDOE Fiscal Year: 2005

Type of Training Activity FRISK Training Location SD County JFEd

Date of Activity Dec 2005 Start and End Times 4 HRS

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 CUSD Robert	Principal/Kelly	Kelly School	Trainer <u>Trainee</u>
2 ROBERT DE VICH			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 attach copy of agenda and materials:

The 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

Employee Signature [Signature] Date 3/15/06

If you have any questions, please contact _____, at _____
PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Dec 2-24-06
To Kathy M

SA 1.7-3

FRISK

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

District/COE CUSD Fiscal Year: 05-06
Type of Training Activity FRISK Guidelines In Evaluating Employee Performance Training Location SOCOE - National City
Date of Activity 10-25-05 Start and End Times 8:30 AM - 11:30 AM 3

Aviara
Oakes
Elem

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1. <u>Sheila Maddox</u>	<u>Principal</u>	<u>Aviara Oakes Elem</u>	Trainer <u>Trainee</u>
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 the training curriculum or attach copy of agenda and materials:

The 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

Employee Signature Sheila Maddox Date 10-25-05

If you have any questions, please contact above at 760-331-6000

PLEASE SUBMIT THIS INFORMATION BY _____ TO _____

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

District/COE _____ Fiscal Year: 05/06

Type of Training Activity FRISK Training Training Location National City Valley middle

Date of Activity 10-25-06 assumed 05-06 because date signed was 2-23-06 - ALSO see Mary Watson's SA 1.7.3 - 5/06 Training Location 830 1/30

Start and End Times _____

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 Carolyn Millikin	Principal	Valley MS	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 the training curriculum or attach copy of agenda and materials:

FRISK Training - How + when to write up an employee + how to include in evaluation

The 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

Employee Signature Carolyn Millikin Date 2-23-06

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE Carlsbad USD Fiscal Year: 05-06

Type of Training Activity FRISK Training Location National City Valley Middle

Date of Activity 10-25-06 Start and End Times 8:30-11:30
assumed '05 - 8:30 because date signed was only 2-22-06 - A lot see many unions SP 1.7-3 - 5/04

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 RICHARD TUBBS	ASSISTANT PRINCIPAL	VALLEY MIDDLE / CVSD	Trainer <u>Trainee</u>
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 the training curriculum or attach copy of agenda and materials:
FRISK training - how to plan, prepare, and implement employee evaluations.

The 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

Employee Signature Richard Tubbs Date 2/22/06

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

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

District/COE Carlsbad Fiscal Year: 05-06

FRISK
Type of Training Activity

SDCOE Magnolia
Training Location

10-25-05
Date of Activity

8:00 - 4:00
Start and End Times

DISTRICT EMPLOYEE NAME (PRINT)	DISTRICT EMPLOYEE POSITION/TITLE	DISTRICT EMPLOYEE WORK LOCATION	31 CODES 32 (circle one)
1 <u>Mary Watson</u>	<u>Principal</u>	<u>Magnolia</u>	Trainer <u>Trainee</u>
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 the training curriculum or attach copy of agenda and materials:

FRISK - Documentation model to improve employee performance. Model includes necessary elements for

The District training coordinator for this event, or another district employee, needs to sign below. legally

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. Sufficient
Documentation

Employee Signature [Signature] Date 2-16-06 PLEASE USE BLUE INK

If you have any questions, please contact _____, at _____

PLEASE SUBMIT THIS INFORMATION BY _____; TO _____

Every employee performance evaluator NEEDS this workshop

You 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!

Get the information you need

- Effect positive change through clear communication
- Identify 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 Bachelor's 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 and cities.

FRISK Basic/Intermediate Training

Audience:

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.

Enrollment:

Limited to 65

Cost:

\$95.00 per person

Location:

San Diego County Office of Education
6401 Linda Vista Rd., Room 306
San Diego, CA 92111-7399
(858) 292-3511

SESSION I

DATE: 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

For any staff that attended Feisk workshop

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
# of reimbursable K-12 evaluations	300	300
Avg. time p/ pre-observation conf. with instructor	10	20
Total Time (in minutes)	3000	6000
Per Hour	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

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 Statistical Data	Fiscal Year ✓									
	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	05-06	
1 A K-12 Probationary Teachers- Total Number	61	94	95	90	121	44	12	12	24	
1 B K-12 Permanent Teachers- Total Number	306	273	283	340	349	424	478	457	444	
1 C K-12 Temporary Teachers- Total Number	79	36	90	65	61	83	60	77	92	
1 D K-12 Classroom Teachers- A + B + C = Total Number	446	403	468	501	531	551	556	546	560	
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	125	143	147	202	233	220	215	
2 C K-12 Temporary Teachers- Total Number Evaluated	75	33	86	60	58	79	61	71	87	
2 D K-12 Classroom Teachers- A + B + C = Total Number Evaluated	272	252	297	313	342	321	305	301	321	
3* K-12 Categorical/Grant Teachers- Total Number Evaluated	20	20	21	22	22	31	26	21	21	
4 Reimbursable K-12 Evaluations Line 2 D subtract Line 3	252	232	276	291	320	290	279	280	300	

*E.C. 52012 School Improvement
E.C. 52852 Coordinated Categorical
E.C. 54444.2 Migrant children
U.S.C. 25; 2604 Indian School Assistance Act

E.C. 52065 Native American
E.C. 54425(b) Chapter 1 Federal compensatory education
E.C. 54724 Drop-out Prevention
Any state-federal-local grant-funded personnel

E.C. 52176 LEP/Bilingual
E.C. 62002.5 State Categorical

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 *Torrie Norton*

Date 3-1-06

If you have any questions, please contact Torrie Norton

at 760-331-5025

PLEASE SUBMIT THIS INFORMATION BY _____ ; TO _____

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

District/COE: CARLSBAD UNIFIED

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

Statistical Data: Certificate Staff on Unsatisfactory Status	Fiscal Year								
	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	1	3	4	2	1
B. Number of re-evaluations	1	1	2	2	0	2	3	2	0
6 Permanent Non-Instructors:	/	/	/	/	/	/	/	/	/
A. Number on unsatisfactory status	1	1	2	1	1	1	1	2	1
B. Number of re-evaluations	1	1	1	0	1	0	1	2	0
7 Reimbursable Re-evaluations 5 B + 6 B = Total	2	2	3	2	1	2	4	4	0

Non-reimbursable re-evaluations (Do not include in the statistics above)

1. Any positions funded by these categoricals:

- | | |
|--|--|
| E.C. 52012 School Improvement | E.C. 52065 Native American |
| E.C. 52176 LEP/Bilingual | E.C. 52852 Coordinated Categorical |
| E.C. 54425(b) Chapter 1 Federal compensatory education | E.C. 54724 Drop-out Prevention |
| E.C. 54444.2 Migrant Children | U.S.C. 25; 2604 Indian School Assistance Act |
| E.C. 62002.5 State Categorical | |

2. Any position that is grant-funded
 3. Re-evaluations of temporary and long-term substitute teachers.

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 Torrie Norton Date 3-1-06
 you have any questions, please contact Torrie Norton at 760-331-5025

PLEASE SUBMIT THIS INFORMATION BY _____ TO _____

Purpose: To summarize time spent by "various principals and vice principals" on Stull Act.
 Source: SA 1.7-1 Average Timesheets.
 Findings:

Schoolsite	Staff	*Activity Codes											
		15				16				17			
		A	B	C	D	A	B	C	D	A	B	C	D
** Aviara Oaks Elem.	Sheila Maddox	330			330	180			180				60
Aviara Oaks Middle	Steve VanZant	10	10		10	15	15	15	15	30	30	30	30
Buena Vista													
Calavera Hills Elem.	Devin Vodicka	5	10	5	10	10	10	10	10	10	10	10	5
Calavera Hills Middle	Erik Trogden	30			30	30			30				
Carlsbad Alternative													
	Dolores Delgado	20				40				30			
	Tom Bloomquist		10	10	10	5	10	10	5				
Carlsbad High	Margaret Stanchi	10	10	10	10	5	10	10	5				
	Willis T. Lord	10	10	10	10	5	10	10	5				
	Scott Wright	10	10	10	10	5	10	10	5				
Hope	Bob Chrisman	20	40	30	30	30	20	30	20	10	20	20	20
Jefferson	Carol Van Vooren	5	5	5	5	5	5	5	5	5	5	5	5
Kelly	R. Devich	30	30	30	30	30	30	30	30	60	60	60	60
Magnolia	Marg Watson	5	20	5	5	5	15	5	10	15	15	5	10
Pacific Rim	Stephen Ahle		20			20				10			
Valley Middle	Carolyn Millikin	5	15	20	5	5	15	20	5	420			60
	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	20.7	18.6	24.4
Summation of criteria B and C			30			29				39			
Averages to be used		10				10				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**

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

** Aviara Oaks Elem. -- Data for this schoolsite not averaged in. Data received is total time for all reviews, not a per review average.

California Department of Education - School Fiscal Services Division

Approved Indirect Cost Rates - Five Year Listing
 (Updated March 2005 by CDE based on SACS expenditure data)
 Address questions to faisinfo@cde.ca.gov, or call (916) 322-1770.

----- APPROVED RATES -----								
For use with state and federal programs, as allowable, in:								
Co.	CDS	Type*	Name (sorted by CDS code)	2001-02 (based on 1999-00 expenditure data)	2002-03 (based on 2000-01 expenditure data)	2003-04 (based on 2001-02 expenditure data)	2004-05 (based on 2002-03 expenditure data)	2005-06 (based on 2003-04 expenditure data)
37	10371	C	San Diego County Superintendent	7.73%	8.11%	8.05%	9.84%	8.54%
37	67967	D	Alpine Union Elementary	2.31%	2.86%	3.46%	3.50%	3.16%
37	67975	D	Bonsall Union Elementary	3.42%	4.86%	4.15%	4.54%	4.41%
37	67983	D	Borrego Springs Unified	10.81%	8.30%	5.40%	6.07%	8.52%
37	67991	D	Cajon Valley Union Elementary	6.21%	5.42%	4.56%	5.55%	7.46%
37	68007	D	Cardiff Elementary	5.49%	4.74%	3.68%	3.96%	4.44%
37	68023	D	Chula Vista Elementary	6.34%	5.54%	4.07%	5.36%	4.76%
37	68031	D	Coronado Unified	5.17%	6.01%	8.47%	8.08%	6.29%
37	68049	D	Dehesa Elementary	2.95%	3.36%	7.82%	7.45%	5.62%
37	68056	D	Del Mar Union Elementary	4.30%	4.67%	2.44%	5.42%	6.00%
37	68080	D	Encinitas Union Elementary	4.67%	5.00%	4.57%	6.33%	5.04%
37	68098	D	Escondido Union Elementary	5.54%	4.68%	4.69%	5.75%	4.97%
37	68106	D	Escondido Union High	8.08%	6.22%	9.05%	10.22%	8.07%
37	68114	D	Fallbrook Union Elementary	7.37%	7.61%	5.46%	6.11%	6.69%
37	68122	D	Fallbrook Union High	6.42%	7.15%	10.46%	11.10%	10.32%
37	68130	D	Grossmont Union High	4.32%	1.56%	3.41%	4.68%	5.70%
37	68155	D	Jamul-Dulzura Union Elementary	7.21%	7.47%	4.34%	1.28%	4.56%
37	68163	D	Julian Union Elementary	2.30%	5.73%	6.57%	9.26%	6.16%
37	68171	D	Julian Union High	3.03%	11.04%	8.04%	4.37%	5.35%
37	68189	D	Lakeside Union Elementary	4.50%	6.14%	9.03%	8.91%	7.63%
37	68197	D	La Mesa-Spring Valley Elementary	3.34%	3.35%	3.01%	3.14%	3.64%
37	68205	D	Lemon Grove Elementary	4.75%	7.38%	9.96%	11.53%	10.06%
37	68213	D	Mountain Empire Unified	8.24%	6.39%	5.11%	6.20%	5.68%
37	68221	D	National Elementary	5.30%	5.73%	6.32%	6.18%	5.85%
37	68296	D	Poway Unified	4.64%	4.53%	5.00%	5.17%	5.19%
37	68304	D	Ramona City Unified	7.09%	5.99%	4.66%	6.62%	7.67%
37	68312	D	Rancho Santa Fe Elementary	2.48%	5.33%	6.59%	8.29%	11.03%
37	68338	D	San Diego City Unified	3.14%	2.30%	3.19%	3.58%	5.83%
37	68346	D	San Dieguito Union High	5.57%	5.35%	6.29%	6.54%	7.45%
37	68353	D	San Pasqual Union Elementary	7.53%	9.39%	4.72%	5.01%	5.82%
37	68361	D	Santee Elementary	7.13%	7.87%	4.72%	5.14%	7.06%
37	68379	D	San Ysidro Elementary	2.58%	4.35%	5.42%	4.89%	5.58%
37	68387	D	Solana Beach Elementary	6.86%	7.90%	6.01%	8.15%	11.18%
37	68395	D	South Bay Union Elementary	8.46%	5.90%	4.54%	6.11%	6.15%
37	68403	D	Spencer Valley Elementary	6.41%	14.49%	16.09%	15.10%	15.98%
37	68411	D	Sweetwater Union High	4.17%	4.15%	6.06%	4.99%	4.63%
37	68437	D	Vallecitos Elementary	9.87%	8.50%	7.47%	8.49%	3.65%
37	68452	D	Vista Unified	3.36%	3.15%	4.09%	4.57%	4.61%
37	73551	D	Carlsbad Unified	6.55%	5.70%	5.03%	5.73%	5.83%
37	73569	D	Oceanside Unified	4.94%	5.06%	4.15%	4.53%	4.44%
37	73791	D	San Marcos Unified	2.75%	3.21%	4.45%	4.07%	3.16%
37	75416	D	Warner Unified	3.87%	1.33%	5.26%	6.17%	7.42%
37	75614	D	Valley Center-Pauma Unified	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

ates

URSEMENT SERVICES

DUCTIVE HOURLY RATE UPDATE

es for the FY: 05-06, and the missing rates for FY:04-05.

0. c
 0. c
 72.08 +
 53.49 +
 125.57 *
 125.57 ÷
 2. =
 62.785 *

Approved
Approved
Approved

T NAME: Carlsbad Unified School District

Title	Fiscal Years:	
	04-05	05-06
AVERAGE ADMIN ASSISTANT		\$ 25.79
AVERAGE BUS DRIVER		
AVERAGE CLERK (SCHOOLSITE)		\$ 20.69
AVERAGE COUNSELOR		
AVERAGE DIRECTOR		\$ 63.80
AVERAGE HEALTH CLERK		\$ 22.98
AVERAGE HIGH SCHOOL PRINCIPAL SECRETARY		\$ 25.26
AVERAGE OFFICE ASSISTANT		\$ 18.18
AVERAGE PRINCIPAL		\$ 72.08
AVERAGE PSYCHOLOGIST		
AVERAGE SCHOOL (ADM) SECRETARY		\$ 26.40
AVERAGE SUBSTITUTE TEACHER		
AVERAGE VICE-PRINCIPAL		
SUBSTITUTE TEACHER (DAILY RATE WITH BENEFITS)		\$ 53.49

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		04-05	05-06
AACKER, CHARLES	DIRECTOR-MAINT/OPERATIONS		\$ 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		\$ 66.30
BOLING, JEAN MARIE	ADMINISTRATIVE SECRETARY		\$ 32.84
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		\$ 18.95
CHIRICETTI, DONNA	HEALTH TECHNICIAN		\$ 23.91
CHRISMAN, KARL ROBERT	PRINCIPAL - HOPE		\$ 69.79
CICONTE, JENNIFER	HEALTH TECHNICIAN		

SixTen and Associates
MANDATE REIMBURSEMENT SERVICES

Fiscal Years:

Name	Title	04-05	05-06
CISNEROS, LAURA	OFFICE ASSISTANT		\$ 19.64
CONNALLY, KATHY	LIBRARY TECHNICIAN		\$ 21.68
CONROY, LYNN	HEALTH TECHNICIAN		\$ 22.77
DAILY, LAURA	OFFICE ASSISTANT		
DANIELS, CANDICE	ADMIN SECRETARY	\$ 22.63	\$ 24.48
DAVILA, VERA	OFFICE ASSISTANT		\$ 21.65
De ANDA, JOSE	PRINCIPAL- BV		\$ 73.27
De LUCA, MARY	GUIDANCE TECH		\$ 23.92
DELGADO, DELORES	DIR. OF SECONDARY		\$ 75.02
DEVICH, ROBERT	PRINCIPAL - KELLY		\$ 69.79
DOLKAS, THERESE	REGISTRAR		\$ 31.24
DRAWBAUGH, SALLY	ADMINISTRATIVE SECRETARY		\$ 27.03
DURHAM, ELLEN	SUPT SECRETARY		\$ 49.46
EVANS, AMY	OFFICE CLERK		\$ 20.98
FLANAGAN, MELODY	ATTENDANCE CLERK		\$ 19.18
FORNELLI, LINDA	RESOURCE NURSE		
FRAZIER, SUSAN	ACCOUNTANTING TECHNICIAN		\$ 26.33
FREEMAN, CHERYL	TEST SITE COORDINATOR		
FREEMAN, GAYLEN	DEPUTY SUPERINTENDENT		\$ 87.93

SixTen and Associates
MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		04-05	05-06
JIMENO, ALICE	ADMINISTRATIVE SECRETARY		\$ 25.75
KRYZAK, JENNIFER	HEALTH TECHNICIAN	\$ 21.00	\$ 19.67
KUHN, MARY	ADMINISTRATIVE SECRETARY-CONFIDENTIAL		\$ 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
LORD, WILLIS (BILL)	ASSISTANT PRINCIPAL		\$ 64.57
LUTZ, CINDY	HEALTH TECHNICIAN		\$ 21.68
MADDOX, H	ASST. SUPERINTENDENT		
MADDOX, SHEILA	PRINCIPAL		\$ 69.79
MARSHALL, KIM	PRINCIPAL-VALLEY M		
MARTINEZ, PAUL	MAINTENANCE III		\$ 34.50
McCORMACK, KATHRYN	LEAD ACCOUNTANT		\$ 33.68
McCORMICK, LAURA JEAN	OFFICE ASSISTANT		\$ 16.96
McKEE, CAROLE	STAR ADMINISTRATOR		
MILLER, BARBARA	DIRECTOR		\$ 72.83
MILLIKIN, CAROLYN	PRINCIPAL		\$ 73.27

MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		04-05	05-06
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		\$ 23.35
SONNICH, STEVE	DIRECTOR OF CLASSIFIED PERSONNEL		
STANCHI, MARGARET	ASSISTANT PRINCIPAL		\$ 69.61
SWEARINGEN, BARBARA	ADMIN ASSISTANT		\$ 23.35
SWEARINGEN, DOLORES	FOOD SERVICE WORKER		\$ 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		\$ 32.86
TROGDEN, ERIC	ASSISTANT PRINCIPAL		\$ 65.63
TRUXAW, PEGGY	OFFICE ASSISTANT		\$ 19.64

SixTen and Associates
MANDATE REIMBURSEMENT SERVICES

Name	Title	Fiscal Years:	
		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		\$ 16.96
VODICKA, DEVIN	PRINCIPAL		\$ 73.27
WADE, BETH	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		

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

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.)

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Keith Petersen, *SixTen & Associates*

Claimant Representative

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kpbsixten@aol.com

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P.O. Box 894059, Temecula, CA 92589
Phone: (951) 303-3034
sandrareynolds_30@msn.com

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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*

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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



BETTY T. YEE
California State Controller

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,

A handwritten signature in black ink, appearing to read "Jim L. Spano".

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

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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	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**

3301 C Street, Suite 725

2 Sacramento, CA 95816

3 Telephone No.: (916) 324-8907

4 **BEFORE THE**

5 **COMMISSION ON STATE MANDATES**

6 **STATE OF CALIFORNIA**

7
8
9
10 **INCORRECT REDUCTION CLAIM (IRC)**
ON:

11 *The Stull Act Program*

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

No.: IRC 14-9825-I-02

AFFIDAVIT OF BUREAU CHIEF

16
17
18 I, Jim L. Spano, make the following declarations:

- 19 1) I am an employee of the State Controller's Office (SCO) and am over the age of 18
20 years.
- 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 3) I am a California Certified Public Accountant.
- 23 4) I reviewed the work performed by the SCO auditor.
- 24 5) Any attached copies of records are true copies of records, as provided by Carlsbad
25 Unified School District or retained at our place of business.

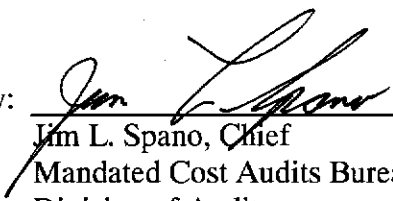
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- 6) The records include claims for reimbursement, along with any attached supporting documentation, explanatory letters, or other documents relating to the above-named IRC.
- 7) A field audit of the claims for fiscal year (FY) 2005-06, FY 2006-07, 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

By: 

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	Actual Costs Claimed	Allowable Per Audit	Audit Adjustments
<u>July 1, 2005, through June 30, 2006</u>			
Direct costs:			
Salaries and Benefits			
Evaluation activities	\$ 97,325	\$ 54,081	\$ (43,244)
Training	2,193	2,193	-
Total direct costs	99,518	56,274	(43,244)
Indirect costs	5,674	3,281	(2,393)
Total program costs	<u>\$ 105,192</u>	59,555	<u>\$ (45,637)</u>
Less amount paid by the State ¹		-	
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 59,555</u>	

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	157,984	40,731	(117,253)
Indirect costs	10,237	2,639	(7,598)
Total program costs	<u>\$ 168,221</u>	43,370	<u>\$ (124,851)</u>
Less amount paid by the State ¹		-	
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 43,370</u>	

July 1, 1999, through June 30, 2000

Direct and indirect costs:

<u>Cost Elements</u>	<u>Actual Costs Claimed</u>	<u>Allowable Per Audit</u>	<u>Audit Adjustments</u>
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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	130,200	72,151	(58,049)
Indirect costs	6,302	3,492	(2,810)
Total program costs	<u>\$ 136,502</u>	75,643	<u>\$ (60,859)</u>
Less amount paid by the State ¹		-	
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 75,643</u>	

<u>Cost Elements</u>	<u>Actual Costs Claimed</u>	<u>Allowable Per Audit</u>	<u>Audit Adjustments</u>
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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	96,860	56,594	(40,266)
Indirect costs	5,986	3,498	(2,488)
Total program costs	<u>\$ 102,846</u>	60,092	<u>\$ (42,754)</u>
Less amount paid by the State ¹		(60,092)	
Allowable costs claimed in excess of (less than) amount paid		<u>\$ -</u>	

Cost Elements	Actual Costs	Allowable	Audit
	Claimed	Per Audit	Adjustments
<u>July 1, 2005, through June 30, 2009</u>			
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	<u>\$ 512,761</u>	238,660	<u>\$ (274,101)</u>
Less amount paid by the State ¹		(60,092)	
Allowable costs claimed in excess of (less than) amount paid		<u>\$ 178,568</u>	

¹ Payment information current as of September 17, 2015.

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).

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)

Issue

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:

<u>Cost Elements</u>	<u>Actual Costs Claimed</u>	<u>Allowable Per Audit</u>	<u>Audit Adjustments</u>
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 costs	<u>\$ 512,761</u>	<u>\$ 238,660</u>	<u>\$ (274,101)</u>

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;
4. 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 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 (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 not 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)

Issue

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:

<u>Fiscal Year</u>	<u>Number of Evaluations</u>		
	<u>Per Time Study</u>	<u>Allowable Per Audit</u>	<u>Adjustments</u>
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 do not provide classroom instruction and are considered "non-instructional" certificated personnel. Emphasis added.

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 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 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 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.

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

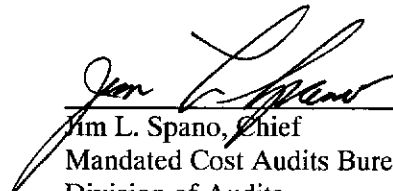
The SCO audited the Carlsbad Unified School District's claims for costs of the legislatively mandated Stull Act Program (Chapter 498, Statutes of 1983; and Chapter 4, Statutes of 1999) for the period of July 1, 2005, through June 30, 2009. The district claimed \$512,761 for the mandated program. Our 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:



Jim 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

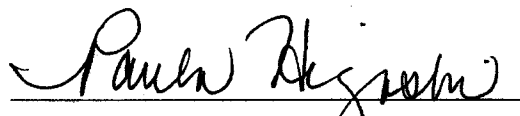
The Stull Act

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

6-1-2004
Date

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,
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Filed on July 7, 1999;
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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 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

¹ 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"⁷ 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.⁹

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.¹²

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.

¹⁶ *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 state-mandated 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.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."³⁵ 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 state-mandated 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 California*⁴⁹, 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.”⁵² 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.”⁵³ 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 all 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 school 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.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.⁶⁶ 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.⁷¹ Certificated employees must be properly credentialed for the specific position they hold.⁷² 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.) 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.⁷⁵ In 1972, the Legislature revisited the Stull Act and expressly excluded certificated personnel employed on an hourly basis in adult education classes.⁷⁶ In 1973, school districts were authorized to exclude hourly and temporary certificated employees, and substitute teachers from the evaluation requirement.⁷⁷ 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.⁸⁹ 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.”⁹⁴ 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 state-mandated 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.⁹⁸ 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 ... 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.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.¹⁰³ 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.¹⁰⁴ 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.

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.¹¹³ 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.¹¹⁴ In addition, the Act established the Standardized Testing and Reporting Program (otherwise known as the STAR Program)¹¹⁵, 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.¹¹⁶ 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

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, subs. (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:

- once each year for probationary certificated employees;
- every other year for permanent certificated employees; and

¹²¹ 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.)

- 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;
- 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 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));

- 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)).

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: Audit of Mandated Cost Claims for Stull Act Program
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

A.5.38

A.1.1

A.6.5
 p.1/1
 Revised finding

Fiscal Year	Time Study					Audited										Difference (j) - (E)
	(A) Completed Evaluations	(B) Average Hours per Evaluation	(C) Total Hours (A) x (B)	(D) Average Productive Hourly Rate	(E) Total Salaries & Benefits (C) x (D)	Type of Teacher			(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)	
2005-06	178	10.625	1,891.3	\$ 65.76	\$ 124,372	106	44	16	166	6	160	5.14	822.4	\$ 65.76	\$ 54,081	\$ (70,291)
2006-07	112	10.625	1,190.0	69.67	82,907	108	1	3	112	6	106	5.14	544.8	69.67	37,956	(44,951)
2007-08	209	10.625	2,220.6	68.34	151,756	159	12	36	207	6	201	5.14	1,033.1	68.34	70,602	(81,154)
2008-09	161	10.625	1,710.6	\$ 84.61	\$ 144,734	113	9	32	154	7	147	5.14	755.6	\$ 74.90	\$ 56,594	\$ (88,140)
Total	660		7,012.5		\$ 503,769	486	66	87	639	25	614		3,155.9		\$ 219,233	\$ (284,536)

Before receipt of additional documentation

	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	(41,200)
Total	\$ 477,156	\$ 218,013	\$ (259,143)

After receipt of additional documentation

	Claimed	Audited	Difference
2005-06	\$ 97,325	\$ 54,081	\$ (43,244)
2006-07	155,019	37,956	(117,063)
2007-08	128,560	70,602	(57,958)
2008-09	96,252	56,594	(39,658)
Total	\$ 477,156	\$ 219,233	\$ (257,923)

Evaluation Activities Adjustment

A.6.5

Difference between Before and After receipt of additional documentation

	Before	After	Difference
2005-06	\$ 54,758	\$ 54,081	\$ (677)
2006-07	37,601	37,956	355
2007-08	70,602	70,602	-
2008-09	55,052	56,594	1,542
Total	\$ 218,013	\$ 219,233	\$ 1,220

A.6.PS

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.5, 38
 P. 11/1

Fiscal Year	Time Study					Audited										Difference (j) - (E)
	(A) Completed Evaluations	(B) Average Hours per Evaluation	(C) Total Hours (A) x (B)	(D) Average Productive Hourly Rate	(E) Total Salaries & Benefits (C) x (D)	Type of Teacher			(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)	
	<input checked="" type="checkbox"/> A.5.23	<input checked="" type="checkbox"/> A.5.35		<input checked="" type="checkbox"/> A.5.24	<input checked="" type="checkbox"/> A.5.17	<input checked="" type="checkbox"/> A.5.31				<input checked="" type="checkbox"/> A.5.23		<input checked="" type="checkbox"/> A.5.35		<input checked="" type="checkbox"/> A.5.37		
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 <input checked="" type="checkbox"/> A.5.40	\$ (69,614)
2006-07	112	10.625	1,190.0	69.67	82,907	<input checked="" type="checkbox"/> A.5.32			107	1	105	5.14	539.7	69.67	37,601 <input checked="" type="checkbox"/> A.5.40	(45,306)
2007-08	209	10.625	2,220.6	68.34	151,756	<input checked="" type="checkbox"/> A.5.33			161	10	207	5.14	1,033.1	68.34	70,602 <input checked="" type="checkbox"/> A.5.40	(81,154)
2008-09	161	10.625	1,710.6	\$ 84.61	\$ 144,734	<input checked="" type="checkbox"/> A.5.34			109	9	143	5.14	735.0	\$ 74.90	\$ 55,052 <input checked="" type="checkbox"/> A.5.40	\$ (89,682)
Total	660		7,012.5		\$ 503,769		485	64	87	636	25	611	3,140.5		\$ 218,013 <input checked="" type="checkbox"/> A.5.38	\$ (285,756)

A5.PS

A.5.38

	Claimed	Audited	Difference	
2005-06	\$ 97,325	\$ 54,758 <input checked="" type="checkbox"/> A.5.38	\$ (42,567)	<input checked="" type="checkbox"/> A.5.40
2006-07	155,019	37,601	(117,418)	<input checked="" type="checkbox"/> A.5.40
2007-08	128,560	70,602	(57,958)	<input checked="" type="checkbox"/> A.5.40
2008-09	96,252	55,052	(41,200)	<input checked="" type="checkbox"/> A.5.40
Total	\$ 477,156	\$ 218,013	\$ (259,143)	

A.6.5

(prior to revising after draft report)

Carlsbad Unified School District
 The Stull Act Program
 Direct Training Costs
 July 1, 2005, through June 30, 2009
 S10-MCC-039

A5.PS

A.S.44
 P. 1/2

Reimbursable Criteria for this component:

Allowable training Train staff on implementing the reimbursable activities.
 One time activity for each employee.

Fiscal Year and Employee Name, Class	Claimed Information			Auditor's Analysis				Comments
	A Hours Claimed	B PHR Claimed	C Sal and Ben Claimed (A * B)	D Allowed Hours	E Allowed PHR	F Allowed Sal and Ben (D*E)	G Audit Adjustments (F-C)	
B.2.3 FY 2005-06 →								
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	-	
Watson, Margaret, Principal	8.00	\$ 66.14	529.12	8.00	\$ 66.14	529	-	
Subtotal			\$ 2,193.00			\$ 2,193	\$ -	
B.2.3 FY 2006-07 →								
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	\$ 70.24	211	-	
Subtotal			\$ 2,965.00			\$ 2,775	\$ (190)	
B.2.3 FY 2007-08 →								
Armstrong, Theresa, Principal	1.50	\$ 60.76	\$ 91.14	-	\$ 60.76	\$ -	\$ (91)	Claimed in FY 2006-07
Bloomquist, Tom, Assist Principal	3.50	69.93	244.76	3.50	69.93	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	-	

Carlsbad Unified School District
 The Stull Act Program
 Direct Training Costs
 July 1, 2005, through June 30, 2009
 S10-MCC-039

A5.PS

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.

Fiscal Year and Employee Name, Class	Claimed Information			Auditor's Analysis				Comments
	A Hours Claimed	B PHR Claimed	C Sal and Ben Claimed (A * B)	D Allowed Hours	E Allowed PHR	F Allowed Sal and Ben (D*E)	G Audit Adjustments (F-C)	
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			\$ 1,549	\$ (91)	
						A.5.40		
B.2.3								
FY 2008-09								
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 Principal	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	-	\$ 71.01	-	(142)	Claimed in FY 2007-08
Subtotal			\$ 608.00			\$ -	\$ (608)	
						A.5.40		
TOTAL			\$ 7,406			\$ 6,517	(889)	A5.PS
			A5.PS			A5.PS		

* Unable to verify PHR claimed.

training cost
 adjustment

Carlsbad Unified School District

The Stull Act

Indirect Costs Summary - Revisions to the Draft Audit Report

July 1, 2005, through June 30, 2009

S10-MCC-039

A.6.PS

A.5.39

A.6.6.
p.111

Fiscal Year	Before receipt of additional documentation			After receipt of additional documentation			Difference
	Actual Costs Claimed	Allowable per Audit	Audit Adjustments	Actual Costs Claimed	Allowable per Audit	Audit Adjustments	
2005-06	\$ 5,674	\$ 3,320	\$ (2,354)	\$ 5,674	\$ 3,281	<input checked="" type="checkbox"/> A.6.6 (2,393)	\$ (39)
2006-07	10,237	2,616	(7,621)	10,237	2,639	<input checked="" type="checkbox"/> A.6.6 (7,598)	23
2007-08	6,302	3,492	(2,810)	6,302	3,492	<input checked="" type="checkbox"/> A.6.6 (2,810)	-
2008-09	5,986	3,402	(2,584)	5,986	3,498	<input checked="" type="checkbox"/> A.6.6 (2,488)	96
Total	\$ 28,199	\$ 12,830	\$ (15,369)	\$ 28,199	\$ 12,910	\$ (15,289)	\$ 80

A.6.7

A.6.PS

A.2.PS

Indirect Costs Adjustment

Tab 6

Carlsbad Unified School District
 The Stull Act
 Average Hours
 July 1, 2005, through June 30, 2009
 S10-MCC-039

A5.PS

A.5.35
 page 1/1

Evaluation Categories	Time Study Minutes	Audited Allowable Minutes	Unallowable Minutes
A1. Preparing before training or planning meetings/conferences.	A.5.18 455	-	(1,455)
A2. Time spent training or in planning meetings/conferences.	2,562	-	(2,562)
A3. Preparing/organizing notes from training or planning meetings/conferences.	1,065	-	(1,065)
B4. 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. Time spent preparing before classroom observations of teachers.	3,650	-	(3,650)
D11. Time spent in "informal" classroom observations.	30,695	30,695	-
D12. Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> forms.	17,580	17,580	-
D13. Preparing/organizing notes from classroom observations, finalizing <i>Collect Data</i> forms.	7,800	-	(7,800)
E14. Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.	3,650	-	(3,650)
F15. 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 <i>Reflecting Conference</i> worksheets.	1,140	-	(1,140)
G18. Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	8,480	8,480	-
H19. Time spent preparing before Final Evaluation conferences with teachers.	2,955	-	(2,955)
H20. 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)
I22. 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	A.5.38	

A.5.PS

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
page 1/13

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	x	x	60			75			25	40	200	A1
A1	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	x								300	300	A1
A1	Hartman, Jane	Principal	Jefferson ES	x	x	240				45	50	40	30	405	A1
A1	Hines, Jimmy	Principal	Magnolia ES	x	x					70			65	135	A1
A1	Holley, Keith	Director	CVA/CSA	x	x	45	70	105			30			250	A1
A1	Huesing, Kimberly	Principal	Aviara Oaks ES	x	x				30	75	30			135	A1
A1	Lord, Bill	Asst. Principal	Carlsbad High	x	x						30			30	A1
														1,455	A1 Total
A2	Ahle, Steve	Principal	Poinsettia ES	x	x	82			205			65	70	422	A2
A2	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	x								240	240	A2
A2	Devich, Robert	Principal	Pacific Rim ES	x	x	30			30	30	30	30	30	180	A2
A2	Hartman, Jane	Principal	Jefferson ES	x	x	180				75	135	80		470	A2
A2	Hines, Jimmy	Principal	Magnolia ES	x	x	50				60				110	A2
A2	Holley, Keith	Director	CVA/CSA	x	x	30	90	75						195	A2
A2	Huesing, Kimberly	Principal	Aviara Oaks ES	x	x				135	345	270	150		900	A2
A2	Morales, J. Cesar	Principal	Valley MS	x	x	30								30	A2
A2	Stanchi, Margaret	Principal	Carlsbad High	x	x						15			15	A2
														2,562	A2 Total
A3	Ahle, Steve	Principal	Poinsettia ES	x	x	20			35			20	60	135	A3
A3	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	x								120	120	A3
A3	Devich, Robert	Principal	Pacific Rim ES	x	x	30			30	30	30	30	30	180	A3
A3	Hartman, Jane	Principal	Jefferson ES	x	x	60				45	50	40		195	A3
A3	Hines, Jimmy	Principal	Magnolia ES	x	x	15				20				35	A3
A3	Holley, Keith	Director	CVA/CSA	x	x		30	45			30			105	A3
A3	Huesing, Kimberly	Principal	Aviara Oaks ES	x	x				25	60	90	15	30	220	A3
A3	Lord, Bill	Asst. Principal	Carlsbad High	x	x			15			30			45	A3
A3	Morales, J. Cesar	Principal	Valley MS	x	x	30								30	A3

Schedule A-2
 Carlsbad Unified School District
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A.S.18
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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
														1,065	A3 Total
B4	Ahle, Steve	Principal	Poinsettia ES						20	60				80	B4
B4	Armstrong, Tessie	Principal	Kelly				120							120	B4
B4	Bloomquist, Tom	Asst. Principal	Carlsbad High		60									60	B4
B4	Coelho, Megan	Interim Principal	Aviara Oaks MS									60		60	B4
B4	Devich, Robert	Principal	Pacific Rim ES	60										60	B4
B4	Giordani, Marjorie	Asst. Principal	Carlsbad High		60									60	B4
B4	Hancock, Catina	Principal	Calavera Hills MS		45	65	55	20						185	B4
B4	Harden, Leslie	Principal	Calavera Hills ES		30	15	60							105	B4
B4	Hartman, Jane	Principal	Jefferson ES							45	30	20	30	125	B4
B4	Hines, Jimmy	Principal	Magnolia ES		540					40	30			610	B4
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
B4	Milliken, Carolyn	Principal	Aviara Oaks MS		90	450								540	B4
B4	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	B4 Total
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

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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
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
B6	Ahle, Steve	Principal	Poinsettia ES				660		15	40		20		735	B6
B6	Coelho, Megan	Interim Principal	Aviara Oaks MS										60	60	B6
B6	Devich, Robert	Principal	Pacific Rim ES	30	2			30						62	B6
B6	Hancock, Catina	Principal	Calavera Hills MS		10	5	55	20						90	B6
B6	Hartman, Jane	Principal	Jefferson ES				270			45	30	20	20	385	B6
B6	Hines, Jimmy	Principal	Magnolia ES			20				20			20	60	B6
B6	Holley, Keith	Director	CVA/CSA			30	30	30			30			120	B6
B6	Huesing, Kimberly	Principal	Aviara Oaks ES		30				40		15		30	115	B6
B6	Morales, J. Cesar	Principal	Valley MS					30						30	B6
B6	Tubbs, Richard	Principal	Hope ES			10	25							35	B6
														1,692	B6 Total
C7	Ahle, Steve	Principal	Poinsettia ES								25			25	C7
C7	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	C7
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	C7
C7	Holley, Keith	Director	CVA/CSA				30		90		30			150	C7
C7	Howard, Tina	Principal	Buena Vista ES						15					15	C7

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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
C7	Huesing, Kimberly	Principal	Aviara Oaks ES								60			60	C7
C7	Lord, Bill	Asst. Principal	Carlsbad High										30	30	C7
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	C9
C9	Coelho, Megan	Interim Principal	Aviara Oaks MS										120	120	C9
C9	Hartman, Jane	Principal	Jefferson ES			120				60			10	190	C9
C9	Holley, Keith	Director	CVA/CSA			25					30			55	C9
C9	Howard, Tina	Principal	Buena Vista ES								5			5	C9

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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
C9	Huesing, Kimberly	Principal	Aviara Oaks ES			20					60			80	C9
C9	Stanchi, Margaret	Principal	Carlsbad High			10								10	C9
C9	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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D11	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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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
E14	Hartman, Jane	Principal	Jefferson ES										10	10	E14
E14	Hines, Jimmy	Principal	Magnolia ES										60	60	E14
E14	Huesing, Kimberly	Principal	Aviara Oaks ES					40			15		155	210	E14
E14	Lord, Bill	Asst. Principal	Carlsbad High								120		120	240	E14
E14	Milliken, Carolyn	Principal	Aviara Oaks MS						135			30		165	E14
E14	Morales, J. Cesar	Principal	Valley MS								50			50	E14

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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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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
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
H20	Coelho, Megan	Interim Principal	Aviara Oaks MS										540	540	H20
H20	Giordani, Marjorie	Asst. Principal	Carlsbad High								60		300	360	H20
H20	Hancock, Catina	Principal	Calavera Hills MS									75	195	270	H20
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)
 Time Conversion - Minutes to Hours
 Average Time per Evaluation

A. J. 18
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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
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	H21 Total
I22	Ahle, Steve	Principal	Poinsettia ES						200					200	I22
I22	Armstrong, Tessie	Principal	Kelly		60									60	I22
I22	Bloomquist, Tom	Asst. Principal	Carlsbad High	30										30	I22
I22	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	I22
I22	Devich, Robert	Principal	Pacific Rim ES	30	2									32	I22
I22	Giordani, Marjorie	Asst. Principal	Carlsbad High								10			10	I22
I22	Hancock, Catina	Principal	Calavera Hills MS		65									65	I22
I22	Harden, Leslie	Principal	Calavera Hills ES	30	45	30								105	I22
I22	Hines, Jimmy	Principal	Magnolia ES			25					40			65	I22
I22	Howard, Tina	Principal	Buena Vista ES	120	120						120			360	I22
I22	Huesing, Kimberly	Principal	Aviara Oaks ES		60									60	I22
I22	Lord, Bill	Asst. Principal	Carlsbad High	30								120		150	I22
I22	Morales, J. Cesar	Principal	Valley MS		90									90	I22

Schedule A-2
 Carlsbad Unified School District
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 Average Time per Evaluation

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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
I22	Stanchi, Margaret	Principal	Carlsbad High	30	30									60	I22

1,467 I22 Total

90,140 Grand Total

*SCO Code	A.1.			
A1	A1	1,455	1,455	A. 5
"	A.1. A2	2,562	2,562	
"	A.1. A3	1,065	1,065	
"	A.1. B4	2,750	2,750	
"	A.1. B5	5,004	5,004	
"	A.1. B6	1,692	1,692	
"	A.1. C7	720	1,440	
"	A.1. C8	3,325	6,650	
"	A.1. C9	535	1,070	
"	A.1. D10	1,825	3,650	
"	A.1. D11	30,695	30,695	
"	A.1. D12	8,790	17,580	
"	A.1. D13	3,900	7,800	
"	A.1. E14	1,825	3,650	
"	A.1. F15	1,375	2,750	
"	A.1. F16	4,295	8,590	
"	A.1. F17	570	1,140	
"	A.1. G18	8,480	8,480	
"	A.1. H19	2,955	2,955	
"	A.1. H20	4,245	4,245	
"	A.1. H21	610	610	
"	A.2. I22	1,467	1,467	
			90,140	117,300

Schedule A-2
 Carlsbad Unified School District
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 Average Time per Evaluation

A.S. 18
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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	
				SCO Code A.1. Total:		115,833								Total Code A.1. (minutes)		115,833
				SCO Code A.2. Total:		1,467								Total Code A.1. (hours)		1,930.6
						<u>117,300</u>								Number of Evaluations in 2010/11 (SA 1.8 Line 2D)		184
														Average Hours per Evaluation - Code A.1.		10.492
														Total Code A.2. (minutes)		1,467
														Total Code A.2. (hours)		24.5
														Number of Evaluations in 2010/11 (SA 1.8 Line 2D)		184
														Average Hours per Evaluation - Code A.2.		0.133

*From *The Stull Act* (98-TC-25) Parameters and Guidelines

A.5.PS

Schedule A-3
 Carlsbad Unified School District
 498/83 The Stull Act - Teacher Evaluations
 (July 2010 to June 2011 Time Study Cycle)
 Classroom Observation Doubling

A.5.19

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	Activity
A1	Ahle, Steve	Principal	Poinsettia ES	x	x	60			75			25	40	200	A1	Preparing before training or planning meetings/conferences.
A1	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	x								300	300	A1	Preparing before training or planning meetings/conferences.
A1	Hartman, Jane	Principal	Jefferson ES	x	x	240				45	50	40	30	403	A1	Preparing before training or planning meetings/conferences.
A1	Hines, Jimmy	Principal	Magnolia ES	x	x					70			65	135	A1	Preparing before training or planning meetings/conferences.
A1	Holley, Keith	Director	CVA/CSA	x	x	45	70	105			30			250	A1	Preparing before training or planning meetings/conferences.
A1	Huesing, Kimberly	Principal	Aviara Oaks ES	x	x				30	75	30			135	A1	Preparing before training or planning meetings/conferences.
A1	Lord, Bill	Asst. Principal	Carlsbad High	x	x						30			30	A1	Preparing before training or planning meetings/conferences.
														1,453	A1 Total	
A2	Ahle, Steve	Principal	Poinsettia ES	x	x	82			205			65	70	422	A2	Time spent training or in planning meetings/conferences.
A2	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	x								240	240	A2	Time spent training or in planning meetings/conferences.
A2	Devich, Robert	Principal	Pacific Rim ES	x	x	30			30	30	30	30	30	180	A2	Time spent training or in planning meetings/conferences.
A2	Hartman, Jane	Principal	Jefferson ES	x	x	180				75	135	80		470	A2	Time spent training or in planning meetings/conferences.
A2	Hines, Jimmy	Principal	Magnolia ES	x	x	50				60				110	A2	Time spent training or in planning meetings/conferences.
A2	Holley, Keith	Director	CVA/CSA	x	x	30	80	75						185	A2	Time spent training or in planning meetings/conferences.
A2	Huesing, Kimberly	Principal	Aviara Oaks ES	x	x				135	345	270	150		900	A2	Time spent training or in planning meetings/conferences.
A2	Morales, J. Cesar	Principal	Valley MS	x	x	30								30	A2	Time spent training or in planning meetings/conferences.
A2	Stanchi, Margaret	Principal	Carlsbad High	x	x						15			15	A2	Time spent training or in planning meetings/conferences.
														2,562	A2 Total	
A3	Ahle, Steve	Principal	Poinsettia ES	x	x	20			35			20	60	133	A3	Preparing/organizing notes from training or planning meetings/conferences.
A3	Coelho, Megan	Interim Principal	Aviara Oaks MS	x	x								120	120	A3	Preparing/organizing notes from training or planning meetings/conferences.
A3	Devich, Robert	Principal	Pacific Rim ES	x	x	30			30	30	30	30	30	180	A3	Preparing/organizing notes from training or planning meetings/conferences.
A3	Hartman, Jane	Principal	Jefferson ES	x	x	60				45	50	40		195	A3	Preparing/organizing notes from training or planning meetings/conferences.
A3	Hines, Jimmy	Principal	Magnolia ES	x	x	15				20				35	A3	Preparing/organizing notes from training or planning meetings/conferences.
A3	Holley, Keith	Director	CVA/CSA	x	x		30	45			30			103	A3	Preparing/organizing notes from training or planning meetings/conferences.
A3	Huesing, Kimberly	Principal	Aviara Oaks ES	x	x				25	60	80	15	30	220	A3	Preparing/organizing notes from training or planning meetings/conferences.
A3	Lord, Bill	Asst. Principal	Carlsbad High	x	x			15			30			45	A3	Preparing/organizing notes from training or planning meetings/conferences.
A3	Morales, J. Cesar	Principal	Valley MS	x	x	30								30	A3	Preparing/organizing notes from training or planning meetings/conferences.
														1,065	A3 Total	
B4	Ahle, Steve	Principal	Poinsettia ES						20	60				80	B4	Time spent preparing before meeting with teachers.
B4	Armstrong, Tessie	Principal	Kelly				120							120	B4	Time spent preparing before meeting with teachers.
B4	Bloomquist, Tom	Asst. Principal	Carlsbad High											60	B4	Time spent preparing before meeting with teachers.
B4	Coelho, Megan	Interim Principal	Aviara Oaks MS		60								60	60	B4	Time spent preparing before meeting with teachers.
B4	Devich, Robert	Principal	Pacific Rim ES		60									60	B4	Time spent preparing before meeting with teachers.
B4	Giordani, Marjorie	Asst. Principal	Carlsbad High		60									60	B4	Time spent preparing before meeting with teachers.
B4	Hancock, Catina	Principal	Calavera Hills MS		45	65	55	20						185	B4	Time spent preparing before meeting with teachers.
B4	Harden, Leslie	Principal	Calavera Hills ES		30	15	60							105	B4	Time spent preparing before meeting with teachers.
B4	Hartman, Jane	Principal	Jefferson ES							45	30	20	30	125	B4	Time spent preparing before meeting with teachers.
B4	Hines, Jimmy	Principal	Magnolia ES		540					40	30			610	B4	Time spent preparing before meeting with teachers.
B4	Holley, Keith	Director	CVA/CSA			60	70	70			30			230	B4	Time spent preparing before meeting with teachers.
B4	Howard, Tina	Principal	Buena Vista ES			90								90	B4	Time spent preparing before meeting with teachers.
B4	Huesing, Kimberly	Principal	Aviara Oaks ES		60				30		15			105	B4	Time spent preparing before meeting with teachers.
B4	Lord, Bill	Asst. Principal	Carlsbad High		60			15						75	B4	Time spent preparing before meeting with teachers.
B4	Milliken, Carolyn	Principal	Aviara Oaks MS		90	450								540	B4	Time spent preparing before meeting with teachers.
B4	Morales, J. Cesar	Principal	Valley MS				75							75	B4	Time spent preparing before meeting with teachers.
B4	Stanchi, Margaret	Principal	Carlsbad High		60		40							100	B4	Time spent preparing before meeting with teachers.
B4	Tubbs, Richard	Principal	Hope ES		30		15	25						70	B4	Time spent preparing before meeting with teachers.
														2,750	B4 Total	
B5	Ahle, Steve	Principal	Poinsettia ES						220	720				940	B5	Time spent in actual conference with teachers.

Schedule A-3
 Carlsbad Unified School District
 498/83 The Stull Act - Teacher Evaluations
 (July 2010 to June 2011 Time Study Cycle)
 Classroom Observation Doubling

A.S. 19

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	Activity
B5	Armstrong, Tessie	Principal	Kelly						30					30	B5	Time spent in actual conference with teachers.
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 MS		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	B5	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.
B5	Morales, J. Cesar	Principal	Valley MS				375							375	B5	Time spent in actual conference with teachers.
B5	Stanchi, Margaret	Principal	Carlsbad High				80							80	B5	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	B5 Total	
B6	Ahle, Steve	Principal	Poinsettia ES				660		15	40		20		735	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Coelho, Megan	Interim Principal	Aviara Oaks MS										60	60	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Devich, Robert	Principal	Pacific Rim ES	30	2			30						62	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Hancock, Catina	Principal	Calavera Hills MS		10	5	55	20						90	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Hartman, Jane	Principal	Jefferson ES				270			45	30	20	20	385	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Hines, Jimmy	Principal	Magnolia ES			20				20			20	60	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Holley, Keith	Director	CVA/CSA			30	30	30			30			120	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Huesing, Kimberly	Principal	Aviara Oaks ES	30					40		15		30	115	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Morales, J. Cesar	Principal	Valley MS					30						30	B6	Time spent preparing or organizing notes from meetings with teachers.
B6	Tubbs, Richard	Principal	Hope ES			10	25							35	B6	Time spent preparing or organizing notes from meetings with teachers.
														1,692	B6 Total	
C7	Ahle, Steve	Principal	Poinsettia ES									25		25	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Giordani, Marjorie	Asst. Principal	Carlsbad High			50								50	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Hancock, Catina	Principal	Calavera Hills MS		5									5	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Hartman, Jane	Principal	Jefferson ES							60			20	80	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Holley, Keith	Director	CVA/CSA			30		90			30			150	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Howard, Tina	Principal	Buena Vista ES						15					15	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Huesing, Kimberly	Principal	Aviara Oaks ES								60			60	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Lord, Bill	Asst. Principal	Carlsbad High										30	30	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Stanchi, Margaret	Principal	Carlsbad High		10			40						50	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
C7	Tubbs, Richard	Principal	Hope ES			10	50		10	5				75	C7	Time spent preparing before "Pre-Observation" conferences with teachers.
														720	C7 Total	
C8	Ahle, Steve	Principal	Poinsettia ES							15	50	95	60	220	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Armstrong, Tessie	Principal	Kelly					15	15		45			75	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Bloomquist, Tom	Asst. Principal	Carlsbad High			40	30							70	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Coelho, Megan	Interim Principal	Aviara Oaks MS										60	60	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Giordani, Marjorie	Asst. Principal	Carlsbad High			85		20						105	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Harden, Leslie	Principal	Calavera Hills ES				20	45						65	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Hartman, Jane	Principal	Jefferson ES			900				60			10	970	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Hines, Jimmy	Principal	Magnolia ES	30						30				60	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Holley, Keith	Director	CVA/CSA			75		20	115		30			240	C8	Time spent conducting "Pre-Observation" conference with teachers.
C8	Howard, Tina	Principal	Buena Vista ES				75		55	20	40	15		205	C8	Time spent conducting "Pre-Observation" conference with teachers.

Schedule A-3
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A.S.19

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	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	C9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Hartman, Jane	Principal	Jefferson ES			120				60				190	C9	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
C9	Holley, Keith	Director	CVA/CSA			25					30			55	C9	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			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 before classroom observations of teachers.
D10	Giordani, Marjorie	Asst. Principal	Carlsbad High						20	65				145	D10	Time spent preparing before classroom observations of teachers.
D10	Hancock, Catina	Principal	Calavera Hills MS			5	40	20	40	70	30	40		245	D10	Time spent preparing before 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								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 before 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				20		5					25	D10	Time spent preparing before classroom observations of teachers.
														1,825	D10 Total	
D11	Ahle, Steve	Principal	Poinsettia 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	416	D11	Time spent in "informal" classroom observations.
D11	Giordani, Marjorie	Asst. Principal	Carlsbad High				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.
D11	Harden, Leslie	Principal	Calavera Hills ES	120	95	420	60	90						785	D11	Time spent in "informal" classroom observations.
D11	Hartman, Jane	Principal	Jefferson ES							150			60	210	D11	Time spent in "informal" classroom observations.
D11	Hines, Jimmy	Principal	Magnolia ES							60	70	150		280	D11	Time spent in "informal" classroom observations.
D11	Holley, Keith	Director	CVA/CSA		465	160	370	380	140	315	300	330		2460	D11	Time spent in "informal" classroom observations.
D11	Howard, Tina	Principal	Buena Vista ES		300				40					340	D11	Time spent in "informal" classroom observations.
D11	Huesing, Kimberly	Principal	Aviara Oaks ES	1400	545	1480		835	905	630	825	1070	1050	8740	D11	Time spent in "informal" classroom observations.
D11	Lord, Bill	Asst. Principal	Carlsbad High	105		15		30	300	510	30	60	60	1110	D11	Time spent in "informal" classroom observations.
D11	Milliken, Carolyn	Principal	Aviara Oaks MS	120	120	20	165	85	375	80	350	90		1405	D11	Time spent in "informal" classroom observations.
D11	Morales, J. Cesar	Principal	Valley MS		24	60	276	12	230	80	80	120		882	D11	Time spent in "informal" classroom observations.
D11	Stanchi, Margaret	Principal	Carlsbad High	90	30	60	180	260	115	60	155	180		1130	D11	Time spent in "informal" classroom observations.
D11	Tubbs, Richard	Principal	Hope ES	210	505	343	164	446	585	640	693	461	440	4487	D11	Time spent in "informal" classroom observations.
														30,695	D11 Total	
D12	Ahle, Steve	Principal	Poinsettia ES							35	135	140	165	475	D12	Time spent in "formal" classroom observations and initial preparation of Collect Data forms.

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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	Activity
D12	Armstrong, Tessie	Principal	Kelly						45	45			405	495	D12	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> 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 <i>Collect Data</i> forms.
D12	Coelho, Megan	Interim Principal	Aviara Oaks MS										240	240	D12	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> 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 <i>Collect Data</i> 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 <i>Collect Data</i> forms.
D12	Harden, Leslie	Principal	Calavera Hills ES				120	165						285	D12	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> forms.
D12	Hartman, Jane	Principal	Jefferson ES										10	10	D12	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> 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 <i>Collect Data</i> 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 <i>Collect Data</i> forms.
D12	Huesing, Kimberly	Principal	Aviara Oaks ES						60		375	120		555	D12	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> 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 <i>Collect Data</i> 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 <i>Collect Data</i> forms.
D12	Morales, J. Cesar	Principal	Valley MS							210				210	D12	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> forms.
D12	Stanchi, Margaret	Principal	Carlsbad High			50	180		120	225			60	635	D12	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> forms.
D12	Tubbs, Richard	Principal	Hope ES				330		110	60				500	D12	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> forms.
														8,790	D12 Total	
D13	Ahle, Steve	Principal	Poinsettia ES							10		20		30	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Armstrong, Tessie	Principal	Kelly						30					30	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Bloomquist, Tom	Asst. Principal	Carlsbad High								10			10	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Coelho, Megan	Interim Principal	Aviara Oaks MS										300	300	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Giordani, Marjorie	Asst. Principal	Carlsbad High	45		130		10		40	120			345	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Hancock, Catina	Principal	Calavera Hills MS			100	20		40	80	30	40		310	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Harden, Leslie	Principal	Calavera Hills ES	30	35		5							70	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Hartman, Jane	Principal	Jefferson ES							60			10	70	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Holley, Keith	Director	CVA/CSA				20	30	40		30	60		180	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Howard, Tina	Principal	Buena Vista ES						5	10	20			35	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Huesing, Kimberly	Principal	Aviara Oaks ES				1620		15				65	1700	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Lord, Bill	Asst. Principal	Carlsbad High						90		60		15	165	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Milliken, Carolyn	Principal	Aviara Oaks MS			30		125	60		90			305	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Morales, J. Cesar	Principal	Valley MS						130	80				210	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Stanchi, Margaret	Principal	Carlsbad High			80			20				15	115	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
D13	Tubbs, Richard	Principal	Hope ES				20		5					25	D13	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
														3,900	D13 Total	
E14	Armstrong, Tessie	Principal	Kelly						30	30				60	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Bloomquist, Tom	Asst. Principal	Carlsbad High									30		30	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Giordani, Marjorie	Asst. Principal	Carlsbad High			300		40		180	60	30		610	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Hancock, Catina	Principal	Calavera Hills MS					60	30					90	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Harden, Leslie	Principal	Calavera Hills ES				15	15						30	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Hartman, Jane	Principal	Jefferson ES										10	10	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Hines, Jimmy	Principal	Magnolia ES										60	60	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Huesing, Kimberly	Principal	Aviara Oaks ES				40			15		155	210	210	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Lord, Bill	Asst. Principal	Carlsbad High							120		120	240	240	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Milliken, Carolyn	Principal	Aviara Oaks MS						135		30			165	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Morales, J. Cesar	Principal	Valley MS							50				50	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
E14	Tubbs, Richard	Principal	Hope ES				90							90	E14	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> 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.

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F15	Bloomquist, Tom	Asst. Principal	Carlsbad High			20	20				10	60		110	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Coelho, Megan	Interim Principal	Aviara Oaks MS										240	240	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Giordani, Marjorie	Asst. Principal	Carlsbad High				60		30	20				110	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Hancock, Catina	Principal	Calavera Hills MS		10	20	10				40	20	20	120	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Hartman, Jane	Principal	Jefferson ES							60			10	70	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Holley, Keith	Director	CVA/CSA				30	30						60	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Howard, Tina	Principal	Buena Vista ES						40					40	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Huesing, Kimberly	Principal	Aviara Oaks ES					20			15	45	15	95	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Lord, Bill	Asst. Principal	Carlsbad High								60			60	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Milliken, Carolyn	Principal	Aviara Oaks MS			30		110	50		120			310	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Stanchi, Margaret	Principal	Carlsbad High			15	20							35	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
F15	Tubbs, Richard	Principal	Hope ES				30	10	20	25				85	F15	Time spent preparing before "Post-Observation" conferences with teachers.	
														1,375	F15 Total		
F16	Ahle, Steve	Principal	Poinsettia ES								110	135		245	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Armstrong, Tessie	Principal	Kelly						30	30		180		240	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Bloomquist, Tom	Asst. Principal	Carlsbad High			40	40		30	50				45	205	F16	Time spent conducting "Post-Observation" conference with teachers.
F16	Coelho, Megan	Interim Principal	Aviara Oaks MS										540	540	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Giordani, Marjorie	Asst. Principal	Carlsbad High			30	120	30	30	60	30	20		320	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Hancock, Catina	Principal	Calavera Hills MS		25	80	40			160	80	80		465	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Harden, Leslie	Principal	Calavera Hills ES				20	150						170	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Hartman, Jane	Principal	Jefferson ES							60			20	80	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Holley, Keith	Director	CVA/CSA				45	30	60		30			165	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Howard, Tina	Principal	Buena Vista ES		15		135		60	30	30	15		285	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Huesing, Kimberly	Principal	Aviara Oaks ES					50			30	45	40	165	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Lord, Bill	Asst. Principal	Carlsbad High			30		30	135				150	345	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Milliken, Carolyn	Principal	Aviara Oaks MS								90	30		120	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Morales, J. Cesar	Principal	Valley MS							90			40	160	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Stanchi, Margaret	Principal	Carlsbad High			35	60		40		125	80		340	F16	Time spent conducting "Post-Observation" conference with teachers.	
F16	Tubbs, Richard	Principal	Hope ES				270	60	60	60				450	F16	Time spent conducting "Post-Observation" conference with teachers.	
														4,295	F16 Total		
F17	Ahle, Steve	Principal	Poinsettia ES								20	10		30	F17	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.	
F17	Giordani, Marjorie	Asst. Principal	Carlsbad High						30			30		60	F17	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.	
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							60			10	70	F17	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.	
F17	Howard, Tina	Principal	Buena Vista ES				15		30	20	10			75	F17	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.	
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					30						30	F17	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.	
F17	Stanchi, Margaret	Principal	Carlsbad High			10								10	F17	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.	
F17	Tubbs, Richard	Principal	Hope ES				45	10	20	15				90	F17	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.	
														570	F17 Total		
G18	Ahle, Steve	Principal	Poinsettia ES		80									900	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	
G18	Armstrong, Tessie	Principal	Kelly											330	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	
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	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	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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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.	
G18	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						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	G18	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.	
														8,480	G18 Total		
H19	Ahle, Steve	Principal	Poinsettia ES		20									1195	1215	H19	Time spent preparing before Final Evaluation conferences with teachers.
H19	Armstrong, Tessie	Principal	Kelly											330	330	H19	Time spent preparing before Final Evaluation conferences with teachers.
H19	Coelho, Megan	Interim Principal	Aviara Oaks MS											60	60	H19	Time spent preparing before Final Evaluation conferences with teachers.
H19	Giordani, Marjorie	Asst. Principal	Carlsbad High								40			60	100	H19	Time spent preparing before Final Evaluation conferences with teachers.
H19	Hancock, Catina	Principal	Calavera Hills MS									25	70	95	H19	Time spent preparing before Final Evaluation conferences with teachers.	
H19	Hartman, Jane	Principal	Jefferson ES											60	60	H19	Time spent preparing before 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 before Final Evaluation conferences with teachers.	
H19	Lord, Bill	Asst. Principal	Carlsbad High										60	60	H19	Time spent preparing before 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 Total		
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											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.	
H20	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 Total		
H21	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										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.	
														610	H21 Total		
I22	Ahle, Steve	Principal	Poinsettia ES						200					200	I22	Discussing the STAR results, with teachers , and how to improve instructional abilities.	
I22	Armstrong, Tessie	Principal	Kelly		60									60	I22	Discussing the STAR results, with teachers , and how to improve instructional abilities.	
I22	Bloomquist, Tom	Asst. Principal	Carlsbad High	30										30	I22	Discussing the STAR results, with teachers , and how to improve instructional abilities.	
I22	Coelho, Megan	Interim Principal	Aviara Oaks MS										180	180	I22	Discussing the STAR results, with teachers , and how to improve instructional abilities.	

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I22	Devich, Robert	Principal	Pacific Rim ES	30	2									32	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Giordani, Marjorie	Asst. Principal	Carlsbad High								10			10	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Hancock, Catina	Principal	Calavera Hills MS		65									65	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Harden, Leslie	Principal	Calavera Hills ES	30	45	30								105	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Hines, Jimmy	Principal	Magnolia ES			25					40			65	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Howard, Tina	Principal	Buena Vista ES	120	120						120			360	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Huesing, Kimberly	Principal	Aviara Oaks ES		60									60	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Lord, Bill	Asst. Principal	Carlsbad High	30								120		150	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Morales, J. Cesar	Principal	Valley MS		90									90	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
I22	Stanchi, Margaret	Principal	Carlsbad High	30	30									60	I22	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
														1,467	I22 Total	
														90,140	Grand Total	
												A	A1	1,455	1,455	Preparing before training or planning meetings/conferences.
												A	A2	2,562	2,562	Time spent training or in planning meetings/conferences.
												A	A3	1,065	1,065	Preparing/organizing notes from training or planning meetings/conferences.
												A	B4	2,750	2,750	Time spent preparing before meeting with teachers.
												A	B5	5,004	5,004	Time spent in actual conference with teachers.
												A	B6	1,692	1,692	Time spent preparing or organizing notes from meetings with teachers.
												A	C7	720	1,440	Time spent preparing before "Pre-Observation" conferences with teachers.
												A	C8	3,325	6,650	Time spent conducting "Pre-Observation" conference with teachers.
												A	C9	535	1,070	Time spent preparing/organizing notes from "Pre-Observation" conferences with teachers.
												A	D10	1,825	3,650	Time spent preparing before classroom observations of teachers.
												A	D11	30,695	30,695	Time spent in "informal" classroom observations.
												A	D12	8,790	17,580	Time spent in "formal" classroom observations and initial preparation of <i>Collect Data</i> forms.
												A	D13	3,900	7,800	Preparing/organizing notes from classroom observations, finalizing " <i>Collect Data</i> " forms.
												A	E14	1,825	3,650	Reports on observations, preparing the <i>Standards for Excellence in Teaching</i> observation checklists.
												A	F15	1,375	2,750	Time spent preparing before "Post-Observation" conferences with teachers.
												A	F16	4,295	8,590	Time spent conducting "Post-Observation" conference with teachers.
												A	F17	570	1,140	Notes from "Post-Observation" conferences and preparing Reflecting Conference worksheets.
												A	G18	8,480	8,480	Writing Final Evaluation Reports and/or preparing the Teacher Evaluation Report.
												A	H19	2,955	2,955	Time spent preparing before Final Evaluation conferences with teachers.
												A	H20	4,245	4,245	Time spent conducting Final Evaluation conferences with teachers.
												A	H21	610	610	Time spent preparing/organizing notes from Final Evaluation conferences with teachers.
												B	I22	1,467	1,467	Discussing the STAR results, <i>with teachers</i> , and how to improve instructional abilities.
														90,140	117,300	

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											Perm	Prob	Temp	Total	
Barrie	Jennifer (Peck)	AOE	4		8/26/02		Perm			6/6/06	1				
Boggs	Martha	AOE	3		8/27/04	Prob 2				6/6/06		1			
Burda	Jan	AOE	1		9/2/97		Perm	X/05		8/17/2002; 4/23/04					0 No evaluation completed. Date of last eval was 4/23/04.
Foster	Jeff	AOE	2		9/8/94		Perm	X/09		8/17/2002; 5/21/04					0 No evaluation completed. Date of last eval was 5/21/04.
Fuller	Jessica	AOE	5		9/10/03		Perm			6/6/06	1				
Garcia	Gina	AOE	3 -		8/27/04	Prob 2				2/3/06; 6/8/06		1			
Georgopoulos	John	AOE	5		8/26/05	Temp 1			S. Maddox	6/14/06			1		
Gilmore	Kathleen	AOE	3		8/28/00		Perm			5/31/06	1				
Hasty	Sarah	AOE	5		8/24/05	Temp 1			T. Howard	1/31/06; 6/8/06			1		
Hogg	Gayle	AOE	1		1/27/97		Perm			6/12/06	1				
Johnson	Erin	AOE	4		9/1/00		Perm			5/6/06	1				
Kirsch	Donna	AOE	KDG		8/27/05	Prob 2			S. Maddox	2/27/06; 6/8/06		1			
Matula	Alice	AOE	1		8/29/96		Perm			6/9/06	1				
Moschner-Arganda	Angelika	AOE	1		8/26/05	Prob 2			T. Howard	3/1/06			1		
Rushing	Jami	AOE	3		8/26/05	Prob 2			S. Maddox	2/7/06; 6/2/06			1		
Sauritch	Judy	AOE	2		8/29/96		Perm			6/8/06	1				
Slamon	Patricia	AOE	1		9/3/87		Perm	X/11		10/24/03; 4/23/04; 5/24/06	1				
Thomason	Bethany	AOE	K		8/28/00		Perm			5/3/06	1				
Vasquez	Cynthia	PR	2		9/5/90		Perm		S. Ahle	10/3/05 5/15/06	1				
Ward	Jill M.	AOE	2		8/26/05	Prob 2			S. Maddox	5/6/06		1			
Weatherall	Ellen	AOE	1		9/18/84		Perm	X/09		4/23/04					0 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				
Ishibashi	Nobi	AOE	Special Education -		9/8/82		Perm			5/1/03; 5/24/06	1				
Stovin	Sue	AOE	DIS/Spch/Lang (K-2 Elem)		9/8/76		Perm	X/07		5/1/99					0 No evaluation completed. Date of last eval was 5/1/99.
Ashton	Brian	AOM	Counselor Science Wheel (Gr 6 Earth Science?)		8/28/00		Perm / 196 Days			5/1/06					0 Counselors not eligible for reimbursement
Burns	Bob	AOM	Science Wheel (Gr 6 Earth Science?)		8/28/97		Perm			5/6/06	1				
Covington	Robert	AOM	Eng 7 / Spanish		8/27/01		Perm			6/12/06	1				
Cowan	Valerie	AOM	Gr 7 Science		8/28/00		Perm			4/20/06	1				
Decosmo	Lynne	AOM	Art		9/2/93		Perm			5/11/06	1				
Dodaro	Mark	AOM	Science/math		9/6/84		Perm			5/6/06	1				
Hauck-Wood	Whitney	AOM	Eng 8 / AVID		8/27/01		Perm			5/16/06	1				
Jaynes	Julie	AOM	Gr 8 Math		8/27/01		Perm			6/2/06	1				
Koepfing	Suzi	AOM	Library Media Spclst		9/2/93		Perm 196 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				
McGinnis	Todd	AOM	PE		10/11/00		Perm			5/10/06	1				
Momeyer	Kelly L.	AOM	Gr 8 English - Humanities EL Student(s)		8/26/05	Temp 1			M. Watson	4/29/06			1		
Moreno	John	AOM	Gr 7 Math		8/26/05	Prob 1			M. Watson	6/16/06			1		
Murray	Frederick	AOM	Math 7, Math 7/B		8/25/03		Perm			5/1/06	1				
O'Neill	Michelle	AOM	Gr 7 History - Soc Studies		8/25/03		Perm			5/8/06	1				
Pier	David	AOM	Gr 6 Math / PE		9/2/99		Perm			5/6/06	1				
Pierce	Robert	AOM	PE		9/2/99		Perm			5/1/06	1				
Riis	Elizabeth	AOM	Gr 6 Science - Earth Science		9/2/99		Perm			4/29/06	1				
Rodak (Oakes)	Sharon	AOM	Gr 6 Humanities		8/27/01		Perm			5/6/06	1				
Rogo	Greg	AOM	Gr 8 Science - Physical Science / PE		8/29/96		Perm			5/10/06	1				
Ruppert	Michael	AOM	Gr 8 Social Studies		6/18/05		Perm			5/31/06	1				
Schuck	Andrea	AOM	Drama		9/11/97		Perm			5/1/06	1				
Schweizer	Susan	AOM	Gr 6/7 Social Science		9/5/90		Perm			5/6/06	1				
Standley	Cynthia	AOM	Gr 6 Humanities: English & Social Studies / Yr. Bk.	0.60	9/2/99		Perm			6/13/06	1				
Visnjic	Branislav	AOM	Gr 7 Science , PE		8/27/04	Prob 2			M. Watson	5/1/06			1		
Yager	Deborah	AOM	Gr 8 Soc Studies		2/2/87		Perm			6/17/06	1				
Anez	Kristin	AOM	SE - English / Study Skills		8/26/05	Prob 2				5/6/06			1		
Grace	Jacqueline	AOM	SE - Grade 6		8/27/04	Prob 2				5/6/06			1		
Enquist	Carol	BV	Speech / Language Pathologist - PreSchool		8/26/05	Prob 2			DeAnda	6/16/06					0 Preschool teachers not eligible for reimbursement
Kim	Gina	BV	SE - Pre-School / SDC		8/27/04	Prob 2			DeAnda	6/16/06					0 Preschool teachers not eligible for reimbursement
Scott	Stacie (Anastacia)	BV	SE - PreSchool - SDC		10/3/02		Perm		DeAnda	6/16/06					0 Preschool teachers not eligible for reimbursement
Cook	Joanne	CVA	Home Education - Grade(s) K-6		8/25/03		Perm			6/1/06	1				

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											Perm	Prob	Temp	Total	
Crosby	Michelle	CVA	Home Education - Grade(s) 9 - 12 Opportunity, Grade(s) 7/8 (labeled Elementary)		9/2/99		Perm	6/14/2011	K Holley	4/18/06				0	Evaluation already counted under Site - CVA; Subject - English 3, Loc/Tech CSA
Williford	Wade	CVA			1/7/02		Perm		K Holley	4/21/06		1		1	
Baima	Lane	CHE	1		8/26/05	Temp 1			D Vocicka	5/17/06			1	1	
Bwario	Norma	CHE	2		8/27/01		Perm		D Vocicka	5/13/06		1		1	
Doolley	Jessica	CHE	1		8/26/05	Temp 1			D Vocicka	5/17/06			1	1	
Dorman	Christie	CHE	1		9/3/96		Perm		D Vocicka	5/18/06		1		1	
Hejny	Kristine	CHE	3		8/27/01		Perm		D Vocicka	2/16/06 5/17/06		1		1	
Hemmings	Joanne	CHE	5		8/26/05	Temp 1			D Vocicka	5/17/06			1	1	
Lyon	Rod	CHE	4		8/27/04		Perm		D Vocicka	5/17/06		1		1	
Norton	Gabie	CHE	4		8/27/04	Prob 1			D Vocicka	5/17/06			1	1	
Phillips	Mary	CHE	2		8/27/01		Perm		D Vocicka	6/9/06		1		1	
Phillips	Paulette	CHE	1		9/3/98		Perm		D Vocicka	6/8/06		1		1	
Smith	Aimee	CHE	3		9/3/98		Perm		D Vocicka	5/6/06		1		1	
Stough	Lindsay	CHE	1		8/27/01		Perm		D Vocicka	5/18/06		1		1	
Thompson	Kristi	CHE	K		9/5/90		Perm		D Vocicka	6/7/06		1		1	
Thorne	Kimberly	CHE	2		8/26/05	Temp 1			D Vocicka	5/17/06			1	1	
Wilson	Erin	CHE	4		9/9/04	Temp 2				1/25/06			1	1	
Adams	Patricia	CHM	Gr 8 English , Chorus		9/3/98		Perm		E. Trogden	5/13/2006 6/11/06		1		1	
Adelgais	Sharon	CHM	Tech Dev/1, Math/1, Pre Alg/2, Math/1		8/28/97		Perm		E. Trogden	6/11/06		1		1	
Bowen	Laura	CHM	Gr 6 Eng/2, Soc Stu/1, Gr 6 Eng/1, Soc Stud/1	0.20	9/18/84		Perm			5/31/06		1		1	
Cooper	Corinne	CHM	Intro Broadcast/1, Inter Broadcast/1, Gr 7 Math/2, Intro Broadcast/1		9/5/95		Perm		E. Trogden	6/11/06		1		1	
Embrey	Heather	CHM	Gr 7 English/2, Gr 7 English/2, Gr 7 Soc Stud/2		8/26/05	Prob 2			E. Trogden	6/14/06			1	1	
Evans	Teanna	CHM	Gr 8 Social Studies		8/26/05	Prob 2			E. Trogden	6/14/06			1	1	
Peterson	Robert	CHM	Gr 6 Gen'l Sci:		8/27/01		Perm		E. Trogden	6/11/06		1		1	
Roberts	Susan	CHM	Gr 6 Math		8/28/97		Perm		E. Trogden	6/15/2001 6/11/06		1		1	
Robusto	AnnaLisa	CHM	Algebra 1/2, Alg Found/2, Geom Honors		8/26/05	Prob 2			E. Trogden	6/14/06			1	1	
Sandoval	Esmeralda	CHM	Art/1, Gr 7 PE/3, Gr 6 PE/1		8/31/95		Perm		E. Trogden	6/11/06				0	No evaluation received by the district.
Sottile	Aaron	CHM	Gr 8 Science: Gen'l		8/24/05	Prob 1			E. Trogden	6/14/06		1		1	
Stapleton	Judi	CHM	Drama, Avid/1, Drama/1		9/8/94		Perm		E. Trogden	6/15/2001 6/11/06		1		1	
Stipe	Holly	CHM	Gr. 7 English/1, Gr 6 English/2		8/26/05	Prob 1			E. Trogden	6/14/06			1	1	
Tatar	Marisa	CHM	Spanish III/1, Gr 8 Eng/2, Spanish I/2		10/11/04	Prob 2			E. Trogden	6/14/06			1	1	
Leong	Marissa	CHM	SE - Gr 6, 7, 8		8/26/05	Prob 1			E. Trogden	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	Sharon	CHM	Special Education		8/27/04	Prob 1			E. Trogden	6/14/06			1	1	
Akerson	Deeanne	CHS	Algebra 2 & 2H		8/27/04	Prob 2			T Bloomquist	6/16/06			1	1	
Blackburn	Daniel "Jake"	CHS	Counselor		8/22/05	Prob 2			M Stanchi	6/6/06				0	Counselors not eligible for reimbursement
Blake	Maria Gomez	CHS	Spanish 1		8/27/04	Prob 2			M Stanchi	6/15/06			1	1	
Curry	Lisa	CHS	Counselor		8/22/05	Prob 2			M Stanchi	6/16/06				0	Counselors not eligible for reimbursement
Dendy	Katherine "Kate"	CHS	Counseling	1.00	9/23/05	Temp 1			M Stanchi	6/19/06				0	Counselors not eligible for reimbursement
Di Benedetto	Christine	CHS	Counselor	SLC grant	2/12/07	Temp 1			Mjordan	6/19/06				0	Counselors not eligible for reimbursement
Gutilla	Natalie	CHS	English, Trans English 1-A, School Success		8/26/05	Prob 2			T Bloomquist	2/28/06 6/16/2006			1	1	
Hachigian	Elena (Medina)	CHS	Social Science: World History-Culture, Art History-AP	0.00	8/27/01		Perm		B Lord	6/15/06		1		1	
Hoyman	Lisa	CHS	English 2		8/27/01		Perm		B Lord	6/15/06		1		1	
Keenan	Laelitia	CHS	French 2, 4 / German 1		8/25/04	Prob 1				1/20/06			1	1	
Kistler	Joyce	CHS	Adv Communications, Peer Advocate, Psychology A		9/10/70		Perm			6/6/96				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	
Livingstone	Alexa	CHS	English 1		10/2/00		Perm		T Bloomquist	6/16/06		1		1	
Livingstone	Roderic	CHS	English 1		9/2/99		Perm		M Stanchi	6/14/06		1		1	
Thompson	Elske	CHS	Counselor	1.00		Temp 1			M Stanchi	6/16/06				0	Counselors not eligible for reimbursement
Mosier	Amber	CHS	Foundations of Geometry, Algebra 2		8/25/03	Prob 2			S Wright	6/12/06			1	1	

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											Perm	Prob	Temp	Total	
Munn	Susan	CHS	Science: Biology 1, ROP Bio Tech Sk	0.20	8/26/02		Perm		M Stanchi	6/18/06	1			1	
Nasser	Stephanie	CHS	English 2 / Sr. English		8/26/05	Prob 2			T. Bloomquist	6/12/2006 11/3/06		1		1	
O'Brian	Ross	CHS	PE: Wt Trng, PE 2, Wrestling		8/22/04	Prob 2			T Bloomquist	6/16/06		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			1	1	
Philippe	Armanda	CHS	English 2 / English 2-H		8/26/05	Prob 2			M Stanchi	6/16/06		1		1	
Simon	Jeffrey	CHS	Math		11/29/04	Prob 2			B Lord	6/14/06		1		1	
Woolley	Susan	CHS	Math: Algebra 1-B & 2 / Geometry		8/24/05	Temp 1			MGiordani	6/14/06			1	1	
Tomkinson	Andrew	CHS	Health, PE 1, Adv Bsktball-F		8/27/04	Prob 2			M Stanchi	6/6/06		1		1	
Fuentes	Kimberly	MAG	4		8/26/05	Temp 1			KWhisnant	5/26/06			1	1	
DeKosky	Sheila	CHS	SE - English Sk / Study Sk / School Success Sk		8/28/00		Perm		B Lord	6/16/06		1		1	
Co	Brian	CVA	World History-Cult / US History/ Psychology		9/8/04	Prob 2			K Holley	6/16/06			1	1	
Cordell	Ron	CVA	Counselor		9/21/95		Perm		K Holley	12/8/06				0	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		11/19/03		Perm		K Holley	4/17/06		1		1	
Ezeir	Eric	CVA	Health / Human Biology / Student Services / PE / PE Tchr Ass't		3/1/02		Perm		K Holley	4/7/06		1		1	
Hobart	Craig	CVA	English, Human Biology, Health, School Success		8/27/04	Prob 2			K Holley	5/15/06			1	1	
Straussner	Heidi	CVA	Sr. Eng / Eng 2 / Music Appreciation		8/27/04	Prob 1			K Holley	6/6/06			1	1	
Bussey	Susan	HOPE	K		9/11/78		Perm	Feb-09	C. Murray M. Watson	5/17/2000 4/8/02 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	5/14/2009	C. Murray M. Watson B. Chrisman	5/22/2000 4/8/02 5/14/04				0	No evaluation completed. Date of last eval was 5/14/04.
Olson	Linda	HOPE	1		9/9/82		Perm	5/14/2009	C. Murray B. Chrisman	6/15/2000 5/14/04				0	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	
Amezcu	Irma	JEFF	1		9/3/98		Perm		C. VanVooren	6/14/06		1		1	
Horrell	Eudocia	JEFF	1		9/9/89		Perm		C. VanVooren	6/14/06		1		1	
Jinich	Elizabeth	JEFF	K		1/6/97		Perm		C. VanVooren	6/14/06		1		1	
Langarica	Maria Laura	JEFF	K		8/27/01		Perm		C. VanVooren	6/14/06		1		1	
Nevarez	Karl	JEFF	3		9/6/84		Perm		C. VanVooren	6/14/06		1		1	
Peabody	Janet	JEFF	PE Specialist	0.60	2/3/97		Perm		C. VanVooren	6/14/06		1		1	
Ponce	Luis	JEFF	5		8/31/95		Perm		C. VanVooren	6/14/06		1		1	
Tatum	Yolanda	JEFF	K		9/27/01		Perm		C. VanVooren	6/14/06		1		1	
Teran-Cruz	Maria	JEFF	2		9/3/98		Perm		C. VanVooren	6/14/06		1		1	
Bentley	Stephanie	KELLY	5		8/27/01		Perm			6/5/06		1		1	
Chang	Susan	KELLY	1		9/26/83		Perm			6/21/06		1		1	
Granich	Noelle	KELLY	1		8/28/97		Perm			6/16/06		1		1	
Kelleher	Lorelei	KELLY	5		8/27/04	Prob 2				6/15/06			1	1	
LaMontagne	Leslie	KELLY	1		1/28/02		Perm			6/15/06		1		1	
Mulvey	Janis	KELLY	K-2		9/7/77		Perm			5/30/06		1		1	
Parrish	Peggy	KELLY	K-1		9/6/84		Perm			5/30/06		1		1	
Schofield	Roberta (Ewing)	KELLY	1		8/27/01		Perm			6/3/03; 6/16/06		1		1	
Shuck	Triesta (Reddick)	KELLY	1		11/7/05	Prob 1				6/16/06			1	1	
Becker	Lynelle	MAG	1		9/5/85		Perm	X (next eval 2007/08)	J Boone	5/18/03				0	No evaluation completed. Date of last eval was 5/16/03.
Clark	Lisa	MAG	5		10/28/92		Perm	X (next eval 2007/08)	J Boone	5/22/03				0	No evaluation completed. Date of last eval was 5/22/03.
Collins-Cripe	Juanita	MAG	1		8/29/96		Perm	X (next eval 2007/08)	J Boone	5/16/03				0	No evaluation completed. Date of last eval was 5/16/03.
Hall	Julia	MAG	SE - DHH Gr. 1/2		8/27/05	Temp 1				6/19/06			1	1	

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Allowable evaluation - change made using additional documentation

Note: Some evaluations were not included in the district's claims, but were allowable.

Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Cat	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 Last Eval	Allowable Evaluations				Comments
											Perm	Prob	Temp	Total	
Hein	Wendy	MAG	3		9/1/88		Perm	X (next eval 2007/08)	J Boone	9/1/98; 5/22/03				0	No evaluation completed. Date of last eval was 5/22/03.
Lamb	Elizabeth	MAG	3		9/2/93		Perm	X (next eval 2007/08)	J Boone	6/1/99; 5/22/03				0	No evaluation completed. Date of last eval was 5/22/03.
Libertino	Sandra	MAG	2		8/31/95		Perm	X (next eval 2007/08)	J Boone	6/1/98; 5/22/03				0	No evaluation completed. Date of last eval was 5/22/03.
Roth	Francisca	MAG	3		9/5/90		Perm	X (next eval 2007/08)	J Boone	6/1/98; 5/22/03				0	No evaluation completed. Date of last eval was 5/22/03.
Seelig	Bobette	MAG	3		9/5/85		Perm	X (next eval 2007/08)	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	X (next eval 2007/08)	J Boone	6/1/98; 5/22/03				0	No evaluation completed. Date of last eval was 5/22/03.
Sturiale	Diana	MAG	4/5		9/6/84		Perm	X (next eval 2007/08)	J Boone	6/1/99; 5/16/03				0	No evaluation completed. Date of last eval was 5/16/03.
Arnold	Thalia	MAG	SE-DHH K		12/10/87		Perm		M. Watson	6/7/06	1			1	
Cooney	Alice	PR	2		8/26/05	Temp 1			S. Ahle	1/30/06; 5/26/06			1	1	
Olsen	Gwyn	MAG	SDC - Preschool		9/9/98		Perm			6/7/06				0	Preschool teachers not eligible for reimbursement
Billingsley	Donna	PR	2		9/2/99		Perm		S Ahle	5/26/06		1		1	
Bloomquist	Shauna	PR	1		8/28/97		Perm		S Ahle	5/15/06		1		1	
Chandler	Tammy	PR	4		9/2/99		Perm			5/15/06		1		1	
Hebert	Lillian	PR	1		8/26/05	Temp 1			S. Ahle	1/31/06; 5/15/06			1	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)	Kelli	PR	1		8/25/03		Perm			5/26/06		1		1	
Firth	Ray	PR	3		3/27/00		Perm			5/15/06		1		1	
Fogarty	Gina	PR	1		8/27/04	Prob 2			S. Ahle	1/10/06; 5/24/06		1		1	
Fox	Kathleen	PR	1		2/1/99		Perm			5/23/06		1		1	
Gallego	Luisa	PR	K - AM		9/5/85		Perm			5/26/06		1		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		1	1	1	
Hughes	Denise	PR	1		8/28/97		Perm			5/23/06		1		1	
VanHollebeke	Anne	PR	K-PM		8/26/05	Temp 1			S. Ahle	1/30/06; 5/23/06			1	1	
Jordan	Katie (Euckert)	PR	4		3/27/00		Perm			5/15/06		1		1	
Kim	Henry	PR	4		12/2/02		Perm			5/30/06		1		1	
McCann	Corey	PR	3		8/27/04		Perm			1/31/06; 5/23/06		1		1	
McGowan	Margaret	PR	2/3		8/29/96		Perm			5/24/06		1		1	
Meyer	Tamara	PR	1		8/26/02		Perm			5/26/06		1		1	
Moore	Kathleen	PR	3		9/1/00		Perm			5/26/06		1		1	
Nielsen	Jane	PR	1		9/2/99		Perm			6/15/01; 4/22/04; 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	Jessica (Hamabe)	PR	3		8/27/01		Perm			5/24/06		1		1	
Rowe	Patricia	PR	2		9/7/83		Perm			5/30/06		1		1	
Southerland	Scott	PR	5		8/26/05	Prob 2				1/31/06; 5/24/06		1		1	
McDonnell	Paul	VMS	SE - SDC/DHH LA, DHH Read, DHH Math, DHH Sci, Band: Beg / Inter / Adv Orchestra/ Music Appreciation		8/26/05	Temp 1			R Tubbs	5/1/06			1	1	
Allard	Arah (Fogel)	VMS			8/27/04		Perm		Millikin	1/17/06; 5/4/06		1		1	
Burns	Kelley	VMS	Gr 6 & 8 PE *EL Student(s)*		3/12/86		Perm	X 08/09		1/27/04				0	No evaluation completed. Date of last eval was 1/27/04.
Byrne	Arlette	VMS	Alg 1 / Foundations Alg		9/30/92		Perm	X 08/09	Armstrong	2/10/04				0	No evaluation completed. Date of last eval was 2/10/04.
Congleton	Suzanne (Eggert)	VMS	Gr 7 English - Gr 7 Adv English		8/26/02		Perm		Millikin	5/10/06		1		1	
de Julien	Donna	VMS	GR 6 English		9/6/84		Perm	X 08/09	Millikin	9/9/04				0	No evaluation completed. Date of last eval was 9/9/04.
De Wulf	Sue	VMS	Art / Adv Art / Wheel 6th (Art)		8/28/00		Perm		Millikin	5/12/06		1		1	

Certificated Evaluation Log
2005-2006

Carlsbad Unified School District
The Stull Act Program
Certificated Evaluation Log
FY 2005-06

A6.PS

A.5.31

Key

Unallowable evaluation - not included in the district's claims

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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 Last Eval	Allowable Evaluations				Comments
											Perm	Prob	Temp	Total	
Donohue	Shawn	VMS	Science Assignment: GR 6 Science		8/26/05	Prob 2			Millikin R Tubbs C Millikin	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	
Pope	Catherine	VMS	Foundations of Algebra / Algebra 1 GR 8		9/28/00		Perm		R Tubbs	4/20/06	1			1	
Salz	Stacy	VMS	Gr 8 Social Studies		8/27/04		Perm		Millikin	5/5/06	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 SE - DHH: LA, Reading & Social Studies		10/3/83		Perm	X 08/1/09		4/20/04				0	No evaluation completed. Date of last eval was 4/20/04.
Jenkinson	Marylou	VMS			2/4/91		Perm		Millikin	5/30/06	1			1	
Montes	Penny	CHS	Foreign Language: ASL 3		8/27/01	Temp 1			B Lord	6/15/06			1	1	
											106	44	16	166	A.6.5
Less number of Categorical/Grant teachers identified by the district														(6)	
														160	↓

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Carlsbad Unified School District
The Stull Act Program
Certificated Evaluation Log
FY 2006-07

A.5.32

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A6.PS

Allowable Evaluations

Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Date of Hire	Status	10 yrs exp/Eval every 5 yrs Next Eval Due Date	Evaluator	Date of Last Eval	Perm	Prob	Temp	Total	Comments
Nicholas	Susan	AOE	3	9/3/92	Perm		S. Maddox	5/29/07	1			1	
Saracino	Deirdre	AOE	SE- Teacher	12/9/93	Perm	2011/12	T. Howard	6/15/07	1			1	
Siamon	Patricia	AOE	1	9/3/87	Perm	2010/11	T. Howard	5/24/06				0	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	
Guillen	Kimberly	AOE	4	8/27/01	Perm		S. Maddox	6/8/07	1			1	
Irwin	Cynthia	AOE	2/3 combo	8/29/01	Perm		T. Howard	6/11/07	1			1	
Michaels	Laura	AOE	1	8/28/97	Perm	2011/12	S. Maddox	6/11/07	1			1	
Russell	Monique	AOE	2	8/28/00	Perm		T. Howard	6/11/07	1			1	
Hogg	Gayle	AOE	1	1/27/97	Perm	2010/11	S. Maddox	6/12/06				0	No evaluation completed. Date of last eval was 6/12/06. Reimbursed in FY 2005-06.
Carlson	Barbara	AOE	1	8/27/01	Perm		T. Howard	6/16/07	1			1	
Cordell	Ron	AOM	Counselor	9/21/95	Perm		M. Watson	6/18/07				0	Counselors not eligible for reimbursement
Visnjic	Branislav	AOM	Gr 7 Science , PE	8/27/04	Perm		M. Watson	6/8/07	1			1	
Hodge	Margaret	AOM	Library Media Specialist	9/29/94	Perm		M. Watson	6/4/07				0	Library Media Specialists not eligible for reimbursement
Moreno	John	AOM	Gr 7 Math	8/26/05	Perm		M. Watson	6/7/07	1			1	
Anez	Kristin	AOM	SE - English / Study Skills	8/26/05	Perm		M. Watson	6/8/07	1			1	
Peabody	Janet	AOM	PE Specialist	2/3/97	Perm		M. Watson	5/16/07				0	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	
Frazee	Leslie	AOM	Gr. 6 - Soc. Studies	8/29/96	Perm		M. Watson	6/6/07	1			1	
Brisebois	Beth (Francis)	BV	2	9/7/83	Perm		J. DeAnda	6/14/07	1			1	
Castillo	Susan	BV	1	2/6/84	Perm		J. DeAnda	6/13/07	1			1	
Enquist	Carol	BV	Speech / Language Pathologist - PreSchool	8/26/05	Perm			6/13/07				0	Preschool not eligible for reimbursement
Fitzpatrick	Joanna	BV		9/1/96	Perm		J. DeAnda	10/7/07	1			1	
Jacobs	Nancy	BV	SE - Spch & Lang Therapist (Preschool intake, Preschool DIS, Regional SH preschool)	9/2/99	Perm			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			1	
Little	Shane	BV	General Education	9/5/85	Perm		J. DeAnda	6/14/07	1			1	
MacPherson	Margaret	BV	1	11/23/92	Perm		J. DeAnda	6/13/07	1			1	
Northridge	Mary	BV	2	9/6/00	Perm		J. DeAnda	6/14/07	1			1	
Taylor	Kevin	BV	3	8/29/96	Perm		J. DeAnda	6/14/07	1			1	
Backensto	Karen	CHE	4	8/29/96	Perm		L. Harden	6/14/07	1			1	
Estep	Sally	CHE	5	8/28/97	Perm		L. Harden	6/18/07	1			1	
Koopsen	Michelle	CHE	2	8/28/97	Perm	2011/2012	L. Harden	6/7/07	1			1	
Marner	Rory	CHE	SE - SDC - Primary	9/8/94	Perm		L. Harden	5/28/07	1			1	
L	Karissa	CHE	SE - SDC - Primary	9/8/94	Temp 2		L. Harden	5/28/07			1	1	
Gaccetta	Judith	CHM	SE - Gr 6 & 7, Study Skills/ GR7 SS/ GR7 English	9/2/93	Perm		E. Trogden	6/6/07	1			1	
LaBreche	Carol	CHM	ASB/1, core Eng/Soc.Studies	8/26/02	Perm		E. Trogden	6/13/07	1			1	
Mitchell	Chad	CHM	Science	2/26/98	Perm		E. Trogden	6/13/07	1			1	
Norton	Gabie	CHM	English	8/27/04	Perm		E. Trogden	6/1/07	1			1	
Palenscar	Tom	CHM	Math/Science Core	9/9/82	Perm	2009/10		9/24/04				0	No evaluation completed. Date of last eval was 9/24/04.
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.
Sandoval	Esmeralda	CHM	Art/1, Gr 7 PE/3, Gr 6 PE/1	8/31/95	Perm		E. Trogden	6/11/07	1			1	
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	2/1/07	1			1	
Dubicz	Robert	CHS	SE - Sr. English Sk, Study Sk	8/27/04	Perm		B. Lord	2/5/07	1			1	
Gaitan	Judy	CHS	SE - SDC: Reading Sk 1 / Study Sk	9/9/82	Perm		M. Giordani	2/20/07	1			1	
Greene	Christopher "Chris"	CHS	Athletic Director / World History/Culture	8/26/05	Perm		M. Stanchi	6/15/07	1			1	

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Carlsbad Unified School District
The Stull Act Program
Certificated Evaluation Log
FY 2006-07

A.5.32

A6.PS

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Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Date of Hire	Status	10 yrs exp/Eval every 5 yrs Next Eval Due Date	Evaluator	Date of Last Eval	Allowable Evaluations				Comments
									Perm	Prob	Temp	Total	
Hanski	Lisa	CHS	SE - SDC: Life Skills only	8/25/06	Prob 2		T. Bloomquist	6/12/07		1		1	
Isbell	Paul	CHS	Soc Studies: US History	4/25/96	Perm		B. Lord	6/15/07	1			1	
Jones	Valane	CHS	Health	9/5/90	Perm		M. Giordani	6/11/07	1			1	
Kross	Norman	CHS	SE - SDC: Gen Math Sk 2 / US History Sk / Study Sk	8/28/00	Perm			2/20/07	1			1	
Marsh	Camille	CHS	SE - SDC: Core Social Studies & Health / Voc Train Sk / Functional Sk-A	8/28/00	Perm			2/20/07	1			1	
Martinez	Phillip	CHS	English	8/25/06	Perm		B. Lord	6/15/07	1			1	
May	John	CHS	Algebra 1, Statistics AP	9/4/86	Perm		M. Giordani	5/18/07	1			1	
Nasser	Stephanie	CHS	English 2 / Sr. English	8/26/05	Perm		M. Stanchi	6/6/07	1			1	
Padilla	Doris	CHS	English 2 & 3	8/29/96	Perm		T. Bloomquist	6/20/07	1			1	
Penrod	Susan	CHS	Social Science	8/25/06	Perm		B. Lord	2/5/07	1			1	
Phillippe	Amanda	CHS	English 2 / English 2-H	8/26/05	Perm		M. Giordani	6/15/07	1			1	
Pierini	Karissa	CHS	World Languages: Spanish	8/25/06	Perm		M. Stanchi	6/4/07	1			1	
Purciel	Mark	CHS	Algebra 1-A, Geometry H	9/2/93	Perm		T. Bloomquist	5/16/07	1			1	
Sakamoto	Gary	CHS	Algebra 1B	8/31/95	Perm	2011/12	T. Bloomquist	1/11/07	1			1	
Spanier	Julia	CHS	SE - Study Skills	8/30/05	Perm			5/9/07	1			1	
Tessier	Margaret	CHS	Physics	8/25/06	Perm		B. Lord	6/19/07	1			1	
Tomkinson	Kristin	CHS	Math	8/25/06	Perm		M. Giordani	5/22/07	1			1	
Heritage	Kathleen	CSA	Independent Studies Gr 9-12	3/5/92	Perm		M. Stanchi	6/5/07	1			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	
Co	Brian	CVA	World History-Cult / US History/ Psychology	9/8/04	Perm		M. Giordani	6/8/07	1			1	
Crosby	Michelle	CVA	English 3, Voc/Tech CSA	9/2/99	Perm	2010/11		4/18/06				0	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			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		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	
Olson	Linda	HOPE	1	9/9/82	Perm	2008/09		5/14/04				0	No evaluation completed. Date of last eval was 5/14/04.
Chavez	Yvonne	JEFF	K	8/28/00	Perm		C. VanVooren	4/25/07	1			1	
Doncouse	Estella	JEFF	4	9/8/94	Perm		C. VanVooren	4/21/07	1			1	
Faure-Gault	Livia	JEFF	4	8/29/96	Perm		C. VanVooren	6/20/07	1			1	
Gnade	Arlene	JEFF	1	1/25/95	Perm		C. VanVooren	5/28/07	1			1	
Heberer	Teresa	JEFF	2	1/2/01	Perm		C. VanVooren	2/7/07	1			1	
Kopp	Christine	JEFF	5	8/27/01	Perm		C. VanVooren	5/10/07	1			1	
McCabe	Eileen	JEFF	2	8/29/96	Perm		C. VanVooren	5/28/07	1			1	
Merritt	Rae	JEFF	2	8/29/96	Perm		C. VanVooren	5/25/07	1			1	
Nugent	Therese	JEFF	Special Education	12/13/00	Perm		C. VanVooren	5/27/07	1			1	
Serafin	Jason	JEFF	5	8/27/01	Perm		C. VanVooren	6/11/07	1			1	
Shepard	Marilyn	JEFF	Music	9/4/86	Perm		C. VanVooren	5/10/07	1			1	
Smith	Anne	JEFF	3	9/7/99	Perm		C. VanVooren	5/15/07	1			1	
Stencil	Karen	JEFF	Music	9/3/87	Perm		C. VanVooren	5/28/07	1			1	
Sterett (Casares)	Norma	JEFF	4	8/29/96	Perm		C. VanVooren	5/10/07	1			1	
Thomas	Shelley	JEFF	Literacy	9/2/99	Perm		C. VanVooren	5/27/07	1			1	
Kramer	Dawn	KELLY	5	8/25/06	Perm		R. Devich	6/15/07	1			1	
Lalana	Sheila	KELLY	3	12/1/90	Perm		R. Devich	6/1/07	1			1	

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Carlsbad Unified School District
The Stull Act Program
Certificated Evaluation Log
FY 2006-07

A.5.32

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A6.PS

Allowable Evaluations

Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Date of Hire	Status	10 yrs exp/Eval every 5 yrs Next Eval Due Date	Evaluator	Date of Last Eval	Perm	Prob	Temp	Total	Comments
Limjoco (Hyman)	Gail	KELLY	SE - SDC: Life Skills only	8/25/06	Perm		R. Devich	5/9/07	1			1	
Nichols	Cynthia	KELLY	4	10/21/97	Perm		R. Devich	6/15/07	1			1	
Rogoff	Diane	KELLY	3	8/28/97	Perm		R. Devich	6/14/07	1			1	
Stone	Deborah	KELLY	3	9/4/86	Perm		R. Devich	6/15/07	1			1	
Taylor	Elizabeth	KELLY	3	2/4/85	Perm		R. Devich	6/15/07	1			1	
Woods	Nicola	KELLY	SE - SDC	8/26/05	Perm		R. Devich	5/9/07	1			1	
Gross	Erica	Kelly	3	9/1/00	Perm		Armstrong	6/14/07	1			1	
Hirshkoff	Heather	KELLY	5	8/25/06	Temp		R. Devich	6/12/07			1	1	
Arnold	Thalia	MAG	SE-DHH K	12/10/87	Perm		K. Whisnant	6/15/07	1			1	
Burns	Daniel	MAG	Gr 6 & 8 PE *EL Student(s)*	9/5/85	Perm		K. Whisnant	6/8/07	1			1	
Cooper	Mary	MAG	K	9/3/98	Perm		K. Whisnant	6/15/07	1			1	
Henken	Laura	MAG	K	9/30/98	Perm		K. Whisnant	6/15/07	1			1	
Lee	Karol	MAG	2	8/29/96	Perm	2007/08		5/16/03				0	No evaluation completed. Date of last eval was 5/16/03.
Pope	Carol	MAG	SE - DIS Spch & Lang (HH caseload)	9/7/90	Perm	2006/07		6/1/02				0	No evaluation completed. Date of last eval was 6/1/02.
Cotter	Ashley	PR	5	8/26/05	Perm		S. Ahle	5/30/07	1			1	
Fogarty	Gina	PR	5	8/27/04	Perm		S. Ahle	5/30/07	1			1	
Pounds	Judith	PR	2	11/1/05	Perm		S. Ahle	6/18/07	1			1	
Slattery	Patricia	PR	2	8/28/00	Perm		S. Ahle	6/14/07	1			1	
Southerland	Scott	PR	5	8/26/05	Perm		S. Ahle	5/30/07	1			1	
Douglass	Debra	VMS	SE - Study Skills/ GR 8 English, GR 8 SS (PER SDCOE)	1/31/00	Perm			6/6/07	1			1	
Allen	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.
Bingham	Ronda	VMS	Grade 6 Science: Earth Science	8/28/97	Perm		Millikin	6/8/07	1			1	
Browne	Lori	VMS	Gr 8 Sci - Physical Science	8/27/01	Perm		Millikin	6/11/07	1			1	
Burns	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.
Byrne	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.
Davila	Randy	VMS	Gr 6, 7, & 8 PE	8/28/97	Perm		C. Morales	6/8/07	1			1	
DeAnda	Corey	VMS	Assessment Center	9/2/03	Temp		T. Armstrong	6/7/07			1	1	
Dre	Dana	VMS	AVID	8/28/97	Perm		C. Millikin	6/12/07	1			1	
Hepburn	Kristina	VMS	Social Studies 7	8/31/95	Perm		C. Morales	6/11/07	1			1	
Kimball	Marianne	VMS	SE - Math / Study Skills/ GR 6 English/ Gr 6 SS	9/8/94	Perm		T. Armstrong	6/22/07	1			1	
Mulvey	Arthur	VMS	Core math and SS	9/2/99	Perm		C. Millikin	6/13/07	1			1	
Parker	William	VMS	SE - LH/SDC: Math 8 Func Skills Academic Core / English 8 / Gr 6, 7 & 8 Science / Gr 8 Social Studies / CORE Reading	9/5/85	Perm		C. Millikin	6/8/07	1			1	
Proctor	Carleen	VMS	Math 6 / Adv Math 6	8/26/02	Perm		T. Armstrong	6/6/07	1			1	
Sabala	Kelly	VMS	ELD Math	8/25/03	Perm		C. Morales	6/13/07	1			1	
Smith	BreeAnn	VMS	Gr 8 Science / ASB	8/26/05	Perm		C. Millikin	6/8/07	1			1	
Smith	Ruthie	VMS	Gr 8 English / Gr 8 Adv English	9/3/98	Perm		T. Armstrong	6/4/07	1			1	
Tibbels	Mary J.	VMS	Gr 8 English / Gr 8 Adv English	10/3/83	Perm	2008/09		4/20/04				0	No evaluation completed. Date of late eval was 4/20/04.
									108	1	3	112	A.6.5
												(6)	
												106	

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Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Date of Hire	Status	10 yrs exp/Eval every 5 yrs Next Eval Due Date	Evaluator	Date of Last Eval	Allowable Evaluations				Comments	
									Perm	Prob	Temp	Total		
Huesing	Kimberly	AOE	Principal	7/1/07									0	Principals not eligible for reimbursement
Weatherall	Ellen	AOE	1	9/18/84	Perm	2008/09		4/1/04					0	No evaluation completed. Date of late eval was 4/1/04.
Burda	Jan	AOE	1	9/3/87	Perm	2008/09		4/28/04					0	No evaluation completed. Date of late eval was 4/28/04.
Foster	Jeff	AOE	2	9/8/94	Perm	2008/09		5/21/04					0	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					0	No evaluation completed. Date of late eval was 6/15/07. Reimbursed in FY 2006-07
Barrie	Jennifer (Peck)	AOE	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	1				1	
Garcia	Gina	AOE	3	8/27/04	Perm		Huesing	4/29/08	1				1	
Moschner-Arganda	Angelika	AOE	1	8/26/05	Perm		Huesing	4/29/08	1				1	
Hasty	Sarah	AOE	5	8/24/05	Perm		Huesing	5/5/08	1				1	
Rushing	Jami	AOE	3	8/26/05	Perm		Huesing	5/5/08	1				1	
Ward	Jill M.	AOE	2	8/26/05	Perm		Huesing	5/5/08	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				1	
Thomason	Bethany	AOE	K	8/28/00	Perm		Huesing	5/8/08	1				1	
Johnson	Erin	AOE	4	9/1/00	Perm		Huesing	5/12/08	1				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	
Slamon	Patricia	AOE	1	9/3/87	Perm	2010/11		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		6/11/07					0	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					0	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		6/8/06					0	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					0	No evaluation completed. Date of last eval was 6/9/06. Reimbursed in FY 2005-06.
Millikin	Carolyn	AOM	Principal	7/28/01									0	Principals not eligible for reimbursement
Kalk	David	AOM	Assistant Principal	9/3/98									0	Assistant Principals not eligible for reimbursement
Hall	Marina	AOM	Music: Strings	8/25/06	Prob 2		Millikin	4/29/08		1			1	
Knoll	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				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				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	Eric	AOM	Algebra 1A & 1B	8/27/01	Perm		Millikin	5/8/08	1				1	
Burns	Bob	AOM	(Gr 6 Earth Science?)	8/28/97	Perm		Kalk	5/9/08	1				1	
Grace	Jacqueline	AOM	SE - Grade 6	8/27/04	Perm		Millikin	5/9/08	1				1	
Pappas	John	AOM	Psychologist	8/16/2007	Temp 2		Kalk	5/12/08					0	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	

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									Perm	Prob	Temp	Total	
O'Neill	Michelle	AOM	Gr 7 History - Soc Studies	8/25/03	Perm		Millikin	5/13/08	1			1	
Standley	Cynthia	AOM	.60 English /40 Yr. Bk.	9/2/99	Perm		Kalk	5/19/08	1			1	
Wycoff	Debra	AOM	SE - Study Skills	8/25/06	Perm		Millikin	6/13/08	1			1	
Emert	Andrea (Shuck)	AOM	Drama	9/11/97	Perm	2010/11		5/1/06				0	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				0	No evaluation completed. Date of last eval was 5/11/06. Reimbursed in FY 2005-06.
De Anda	Jose	BV	Principal									0	Principals not eligible for reimbursement
Howard	Tina	BV	Asst. Principal									0	Assistant Principals not eligible for reimbursement
Goeltz	Kathryn	BV	Psychologist	8/31/00	Perm			6/1/08				0	Psychologists not eligible for reimbursement
Krager	Jessica	BV	Preschool - SDC	8/23/2007	Prob 2		De Anda	5/27/08				0	Preschool teachers not eligible for reimbursement
Levitt	Amanda	BV	PRESCHOOL INSTRUCTOR	5/10/06			De Anda	5/27/08				0	Preschool teachers not eligible for reimbursement
Maulden	Denise	BV	SE - SDC	8/25/06	Perm		De Anda	5/27/08	1			1	
Orzechowski	Rosemarie	BV	Preschool - SDC	8/23/2007	Prob 2		De Anda	5/27/08				0	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	
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			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		6/7/07				0	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		1	
Langen	Patricia	CHE	5	8/23/07	Temp 2		Harden	6/13/08			1	1	
Matsumoto	Nancy	CHE	K	9/2/93	Perm		Harden	6/13/08	1			1	
Nienhaus	Kathy	CHE	4	8/27/04	Perm		Harden	6/1/08	1			1	
Phillips	Paulette	CHE	2	9/3/98	Perm		Harden	6/13/08	1			1	
Ringen	Renae	CHE	3	8/27/04	Perm		Harden	6/13/08	1			1	
Stough	Lindsay	CHE	1	8/27/01	Perm		Harden	6/13/08	1			1	
Thompson	Kristi	CHE	K	9/5/90	Perm		Harden	6/13/08	1			1	
Tinnerstet	Marin	CHE	1	8/25/06	Perm		Harden	6/13/08	1			1	
Van Houten	Merry Ann	CHE	1	2/25/80	Perm		Harden	6/13/08	1			1	
Williford	Wade	CHE	5th?	1/7/02	Perm		Harden	5/8/08	1			1	
Wilson	Erin	CHE	4	9/9/04	Perm		Harden	6/13/08	1			1	
Withers	Anna	CHE	School Psychologist - Preschool	8/25/06	Perm			5/27/08				0	Psychologists not eligible for reimbursement
Hancock	Catina	CHM	PRINCIPAL	1/26/98								0	Principals not eligible for reimbursement
Evanson	Tim	CHM	Asst. Principal									0	Assistant Principals not eligible for reimbursement
Adams	Patricia	CHM	Gr 8 English , Chorus	9/3/98	Perm		Hancock	5/2/08	1			1	
Basic	Laurel	CHM	Counselor	8/1/05	Prob 2		Evanson	5/13/08				0	Counselors not eligible for reimbursement
Butler	David	CHM	PE/1, Soc Stu/1, PE/3	8/27/04	Perm		Hancock	5/2/08	1			1	
Embrey	Heather	CHM	Gr 7 English/2, Gr 7 English/2, Gr 7 Soc 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	
Leong	Marissa	CHM	SE - Gr 6, 7, 8	8/26/05	Perm		Evanson	5/2/08	1			1	
Palenscar	Tom	CHM	Math/Science Core	9/9/82	Perm	2009/10		9/24/04				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	CHM	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	CHM	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	CHM	Algebra 1/2, 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	
Withers	Anna	CHM	School Psychologist - Preschool	8/25/06	Perm		Hancock	5/27/08				0	Psychologists not eligible for reimbursement
Stanchi	Margaret	CHS	Principal	8/25/77								0	Principals not eligible for reimbursement

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									Perm	Prob	Temp	Total		
Bloomquist	Thomas	CHS	Ass't. Principal-Student Svcs	7/26/01									0	Assistant Principals not eligible for reimbursement
Giordani	Marjorie	CHS	Ass't Principal	8/10/06									0	Assistant Principals not eligible for reimbursement
Lord, IV	Willis (Bill)	CHS	Ass't Principal	11/8/04									0	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	
Burroughs	Cathryn	CHS	ROP-	8/23/07	Temp 1		Bloomquist	6/13/08			1		1	
Dendy	Katherine	CHS	Counseling	9/23/05	Perm		Giordani	6/10/08					0	Counselors not eligible for reimbursement
Evanson	Timothy	CHS	Special Education	8/23/2007	Prob 2		Lord	5/8/08		1			1	
Frazier	Walter ("Jack")	CHS	Soc Studies: World History-Cult	2/1/89	Perm		Stanchi	6/13/08	1				1	
Gamelin	Tommy	CHS	ROP-	8/23/07	Temp 1		Bloomquist	6/13/08			1		1	
Hall	Marina	CHS	Music	8/23/07	Prob 2		Giordani	5/15/08					0	Evaluation already counted under Site AOM
Jones	Shawn (Robert)	CHS	Soc Studies: US History	9/5/85	Perm		Lord	4/30/08	1				1	
King	Carol	CHS	ROP-Computer / Application	8/23/07	Temp 1		Stanchi	5/20/08			1		1	
Martin	Lisa	CHS	Art	8/25/06	Perm		Bloomquist	6/13/08	1				1	
Meinhardt	Marisa	CHS	English	8/25/06	Perm		Giordani	6/12/08	1				1	
Muilenburg	Tod	CHS	Science: Cp Marine Sci / Sh Biology 1	9/8/94	Perm		Lord	6/16/08	1				1	
Murray	Chelsea	CHS	English	8/23/07	Prob 2		Stanchi	6/13/08		1			1	
Ponsolle	Odile	CHS	Dance	8/25/06	Perm		Bloomquist	6/12/08	1				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				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									0	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.
Dunn	Joseph	CVA	Environmental Science / US History / Photography	11/19/03	Perm		Holley	5/12/08	1				1	
Ezeir	Eric	CVA	Health / Human Biology / Student Services / PE / PE Tchr Ass't	3/1/02	Perm		Holley	5/8/08	1				1	
Mancuso	Donna	CVA	ROP - Business - Comp App / Dig Art / Yearbook Prod / ROP Dsktp Pbl / Photo Shop	8/25/03	Temp 2		Holley	5/9/08			1		1	
Monroe	Arlene	CVA	English	8/25/06	Temp 2		Holley	6/13/08			1		1	
Redfield	Julia	CVA	Counselor	1/29/07	Prob 1		Holley	5/5/08					0	Counselors not eligible for reimbursement
Smith-Martinez	Tracy	CVA	School Psychologist	9/3/98	Perm		Holley	6/6/08					0	Psychologists not eligible for reimbursement
Tubbs	Richard	HOPE	Principal	8/27/01									0	Principals not eligible for reimbursement
Bannock (Sweeney)	Jennifer	HOPE	Special Education	8/25/03	Perm		Tubbs	5/12/08	1				1	
Bjorstad	William	HOPE	3	9/3/87	Perm		Tubbs	5/12/08	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.
Christian	Sara	HOPE	SE - Speech and Language	8/25/03	Perm		Tubbs	5/19/08	1				1	
Connely	Denise	HOPE	2	8/29/96	Perm		Tubbs	5/12/08	1				1	
Harway	Christine	HOPE	1	1/7/08	Temp 1		Tubbs	6/4/08			1		1	
Hill	Holly	HOPE	1/2 combo	9/5/90	Perm	2008/09		5/14/04					0	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		1	
Kaplowitz	Hun	HOPE	Teacher - Elementary	11/0/06	Temp 2		Tubbs	5/12/08			1		1	
Koopsen	Scott	HOPE	K	9/1/79	Perm		Tubbs	5/14/08	1				1	
Lawrence	Cheryl	HOPE	4	9/2/93	Perm		Tubbs	5/15/08	1				1	
Lovick	Ann	HOPE	3	8/27/01	Perm		Tubbs	5/1/08					1	
Malkind	Michelle	HOPE	SE - SDC: Life Skills only	8/25/06	Temp 2		Tubbs	4/28/08			1		1	
Mayfield	Myles	HOPE	5	8/28/00	Perm		Tubbs	5/12/08	1				1	
Norall	David	HOPE	3 Bilingual	2/3/86	Perm		Tubbs	5/12/08	1				1	

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Carlsbad Unified School District
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A6.PS

Key

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Last Name	First Name	SITE	SUBJECT / GRADE LEVEL	Date of Hire	Status	10 yrs exp/Eval every 5 yrs Next Eval Due Date	Evaluator	Date of Last Eval	Allowable Evaluations				Comments	
									Perm	Prob	Temp	Total		
Olson	Linda	HOPE	1	9/9/82	Perm	2008/09		5/14/04				0	No evaluation completed. Date of last eval was 5/14/04.	
Presley	Deanna	HOPE	3	9/13/93	Perm		Tubbs	4/30/08	1				1	
Rai	Sumit	HOPE	1	9/3/98	Perm		Tubbs	5/1/08	1				1	
Szabo	Kelly	HOPE	4	8/23/07	Temp 1		Tubbs	5/27/08			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									0	Principals not eligible for reimbursement
Hartman	Jane	JEFF	TOSA (Coordinator - IB Program)	8/28/97									0	Coordinators not eligible for reimbursement.
Alper	Robert	JEFF	3	8/28/00	Perm		Van Vooren	6/9/08	1				1	
Alva	Kate	JEFF	3	8/29/96	Perm		Hartman	6/9/08	1				1	
Amezcuca	Irma	JEFF	1	9/3/98	Perm		Van Vooren	6/6/08	1				1	
Durnan	Christie	JEFF	1	9/3/96	Perm		Hartman	6/13/08	1				1	
Ferreira	Laurel	JEFF	3	9/2/99	Perm		Van Vooren	6/9/08	1				1	
Haerberlein	Christy	JEFF	5	8/28/97	Perm		Hartman	6/9/08	1				1	
Horrell	Eudocia	JEFF	1	9/9/89	Perm		Van Vooren	5/9/08	1				1	
Jinich	Elizabeth	JEFF	K	1/6/97	Perm		Hartman	5/8/08	1				1	
Knox	Robin	JEFF	2	8/29/96	Perm		Hartman	5/8/08	1				1	
Nevarez	Karl	JEFF	3	9/6/84	Perm		Van Vooren	6/9/08	1				1	
Ponce	Luis	JEFF	5	8/31/95	Perm		Hartman	5/8/08	1				1	
Quinones	Julia	JEFF	KDG	9/26/07	Temp 1		Van Vooren	6/6/08			1		1	
Schwend	Deborah	JEFF	1st Grade	8/25/06	Temp 2		Hartman	6/6/08			1		1	
Sellers	Andrew	JEFF	Psychologist	8/16/07	Temp 1		Van Vooren	2/1/08					0	Psychologists not eligible for reimbursement
Tatum	Yolanda	JEFF	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				1	
Tsutagawa Ward	Michele	JEFF	K	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									0	Principals not eligible for reimbursement
Bentley	Stephanie	KELLY	5	8/27/01	Perm		Amstrong	4/1/08	1				1	
Chang	Susan	KELLY	1	9/26/83	Perm	2010/11		6/21/06					0	No evaluation completed. Date of last eval was 6/21/06. Reimbursed in FY 2005-06.
Gizzi	Michelle	KELLY	2	8/28/00	Perm		Amstrong	5/6/08	1				1	
Jaffe	Jenifer	KELLY	4	8/28/00	Perm		Amstrong	6/2/08	1				1	
Kelleher	Lorelei	KELLY	2	8/27/04	Perm		Amstrong	4/25/08	1				1	
LaMontagne	Leslie	KELLY	1	1/28/02	Perm		Amstrong	4/22/08	1				1	
Mulvey	Janis	KELLY	K-2	9/7/77	Perm	2010/11		5/30/06					0	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					0	No evaluation completed. Date of last eval was 5/30/06. Reimbursed in FY 2005-06.
Schofield	Roberta (Ewing)	KELLY	1	8/27/01	Perm		Amstrong	4/15/08	1				1	
Smith-Martinez	Tracy	KELLY	School Psychologist	9/3/98	Perm		Amstrong	6/6/08					0	Psychologists not eligible for reimbursement
Wolfson	Deborah	KELLY	SE - Math / Study Skills	3/13/86	Perm		Amstrong	5/8/08	1				1	
Hess	Ron	MAG	Principal	8/28/00	Perm			5/19/08					0	Principals not eligible for reimbursement
Haines	Lucy	MAG	Dir Curr/Interim Principal				Haines						0	Principals not eligible for reimbursement
Clark	Lisa	MAG	5	10/28/92	Perm		Amstrong	6/6/08	1				1	
Collins-Cripe	Juanita	MAG	1	8/29/96	Perm		Amstrong	6/6/08	1				1	
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		Amstrong	5/21/08	1				1	
Hein	Wendy	MAG	3	9/1/88	Perm	2012/13	Amstrong	6/6/08	1				1	
Lamb	Elizabeth	MAG	3	9/2/93	Perm	2012/13	Haines	6/6/08	1				1	
Libertino	Sandra	MAG	2	8/31/95	Perm	2012/13	Haines	6/6/08	1				1	
Roth	Francisca	MAG	3	9/5/90	Perm	2012/13	Haines	6/6/08	1				1	
Sanchez	Treda	MAG	1	8/26/05	Perm		Haines	4/2/08	1				1	
Seelig	Bobette	MAG	3	9/5/85	Perm	2012/13	Haines	6/6/08	1				1	
Sewell	Jackie	MAG	2	9/2/93	Perm	2012/13	Haines	6/6/08	1				1	
Sturiale	Diana	MAG	4/5	9/6/84	Perm	2012/13	Haines	6/5/08	1				1	
Ahle	Stephen	POI	Principal	8/24/82									0	Principals not eligible for reimbursement
Adams	Gwenn	POI	2	9/22/75	Perm		Ahle	5/20/08	1				1	

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Carlsbad Unified School District
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									Perm	Prob	Temp	Total		
Aveni	Peggy	POI	Special Education	8/28/00	Perm		Ahle	5/20/08	1					
Baima	Lane	POI	Teacher - Elementary	8/26/05	Temp 2		Ahle	6/1/08			1			
Brown	Robert	POI	Teacher - Elementary	8/25/06	Prob 2		Ahle	5/2/08		1				
Bwarie	Norma	POI	2	8/27/01	Perm		Ahle	5/22/08	1					
Gilbert	Melissa	POI	1	8/23/07	Temp 1		Ahle	6/2/08			1			
Haeussinger	Joanne	POI	5	8/26/05	Prob 2		Ahle	6/1/08		1				
Hebert	Lillian	POI	Teacher - Elementary	8/26/05	Temp 2		Ahle	6/6/08			1			
Hughes	Denise	POI	1	8/28/97	Perm		Ahle	5/21/08	1					
Kistler	Nicole	POI	4	9/8/94	Perm		Ahle	5/13/08	1					
Loftis	Nonalee	POI	K	8/31/00	Perm		Ahle	5/23/08	1					
Maxon	Blake	POI	4	1/7/02	Perm		Ahle	5/27/08	1					
Mehring	Courtney	POI	1	8/23/07	Temp 1		Ahle	6/5/08			1			
Moersch	Nicole	POI	5	9/13/07	Temp 1		Ahle	6/1/08			1			
Rowe	Patricia	POI	2	9/7/83	Perm		Ahle	5/20/08	1					
Shuck	Triesta	POI	1	11/7/05	Prob 2		Ahle	5/21/08		1				
Trussel	Mike	POI	Teacher - Elementary	8/28/00	Perm		Ahle	6/1/08	1					
Valenty	Aven	POI	K	8/25/06	Temp 2		Ahle	6/5/08			1			
Williamson	Brooke	POI	1	8/25/06	Prob 2		Ahle	6/4/08		1				
Devich	Robert	PR	Principal	7/1/02									0	Principals not eligible for reimbursement
Blakely	Anne	PR	4	8/23/07	Temp 1		Devich	6/13/08			1			
Cozens	Jamie	PR	3	8/27/01	Perm		Devich	6/13/08	1					
Edgerly	Stephanie	PR	2	10/29/07	Temp 1		Devich	6/13/08			1			
Fogarty	Stephanie	PR	2	8/25/06	Prob 2		Devich	6/13/08		1				
Glassey	Jennifer	PR	2	8/25/06	Prob 2		Devich	6/12/08		1				
Gold	Amy	PR	Speech Lang. Path	8/23/07	Temp 1			5/27/08			1			
Granich	Noelle	PR	1	8/28/97	Perm		Devich	6/13/08	1					
Hartman	Ashley	PR	5	4/1/04	Perm		Devich	6/13/08	1					
Jordan	Katie	PR	4	3/27/00	Perm		Devich	6/13/08	1					
Konieczko	Walter	PR	5	8/25/07	Temp 1		Devich	6/13/08			1			
Lockman	Meganne	PR	2	10/29/07	Temp 1		Devich	6/13/08			1			
McGowan	Margaret	PR	3	8/29/96	Perm		Devich	6/13/08	1					
Roberts	Jessica	PR	3	8/27/01	Perm		Devich	6/13/08	1					
Salvaggio	Tamara	PR	1	8/26/02	Perm		Devich	6/13/08	1					
Shira	Shelbi	PR	K - AM/PM	9/3/98	Perm		Devich	6/15/08	1					
Smith-Martinez	Tracy	PR	School Psychologist	9/3/98	Perm			6/6/08					0	Psychologists not eligible for reimbursement
Stayton	Jenesa	PR	2	11/1/06	Temp 2		Devich	6/13/2008			1			
Trenton	Sylvia	PR	K	7/1/99	Perm		Devich	6/13/08	1					
VanHollebeke	Anne	PR	1	8/26/05	Temp 2		Devich	6/13/08			1			
Wiggins	Karen	PR	K - AM	9/2/99	Perm		Devich	6/13/08	1					
Morales	Julio "Cesar"	VMS	Ass't Principal	8/10/06									0	Assistant Principals not eligible for reimbursement
Lund	Chad	VMS	Ass't Principal	8/27/02									0	Assistant Principals not eligible for reimbursement
Bess	Corey	VMS	6th Grade Science	8/23/07	Temp 1		Morales	5/9/08			1			
Bitner	Ashley	VMS	Social Studies	8/23/07	Temp 1		Lund	5/9/08			1			
Boer	Amanda	VMS	Band: Beg / Inter / Adv Orchestra/ Music Appreciation	8/23/07	Temp 1		Morales	5/9/08			1			
Cockerham	Jennifer	VMS	Special Education	8/23/07	Temp 1		Lund	6/13/08			1			
Congleton	Suzanne	VMS	Gr 7 English - Gr 7 Adv English	8/26/02	Perm		Morales	5/1/08	1					
Davidson	Stacy	VMS	Gr 7 Pre-Algebra / Gr 7 Adv Pre Algebra	9/3/98	Perm		Lund	5/5/08	1					
De Wulf	Sue	VMS	Art / Adv Art / 6th (Art)	8/28/00	Perm		Morales	5/9/08	1					
Dixson	Thomas	VMS	Science Technology / Science 7/8	8/31/88	Perm		Lund	5/9/08	1					
Endrizzzi	Verona	VMS	DHH 2,3	9/9/82	Perm		Morales	5/7/08	1					
Fleming	Trish	VMS	Special Ed	8/23/07	Temp 1		Lund	5/12/08			1			
Gastauer	Jennifer	VMS	Sci 7: Life Science	8/31/00	Perm		Morales	5/12/08	1					

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									Perm	Prob	Temp	Total		
Kim	Henry	VMS	Science 8th Grade	12/2/02	Perm		Lund	4/9/08	1				1	
Paynter	Nicole	VMS	Math	8/25/06	Perm		Morales	6/11/08	1				1	
Pineros	Jennifer	VMS	English	8/23/07	Temp 2		Lund	5/8/08			1		1	
Pope	Catherine	VMS	Foundations of Algebra / Algebra 1 GR 8	9/28/00	Perm		Morales	5/12/08	1				1	
Salz	Stacy	VMS	Gr 8 Social Studies	8/27/04	Perm		Lund	5/9/08	1				1	
Schepps	Catherine	VMS	Core math and SS	8/28/00	Perm		Morales	2007/08	1				1	
Schulenburg	Olivia	VMS	Music: Show Stopper, Dolce, Ensemble, Viking Singers, Wheel 6 (Musical Theatre)	8/27/01	Perm		Lund	5/5/08	1				1	
Stover	Catherine	VMS	Pre-Algebra, ELD Found Alg/ ELD Pre Alg, Math 6/7 support	8/28/00	Perm		Morales	5/12/08	1				1	
Tamayo	Vicente	VMS	Social Science	8/25/06	Perm		Lund	4/29/08	1				1	
Vallen	Lori	VMS	Science	8/23/07	Temp 1		Morales	5/9/08			1		1	
Wilkinson	Amber	VMS	Psych	8/16/07	Prob 1		Lund	5/9/08					0	Psychologists not eligible for reimbursement
									159	12	36	207	A.6.5	
Less number of Categorical/Grant teachers identified by the district												(6)		
												201		

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Carlsbad Unified School District
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FullName	Site	Class Description	Status	Job Title	Hire Date	Current Eval Recd	Eval Type	Evaluator	Allowable Evaluations				Comments
									Perm	Prob	Temp	Total	
Alexander, John D	CHS	Certificated	Permanent	Teacher - General Ed	9/3/92	05/12/09	5 Year-Perm	Stanchi, Margaret A	1			1	
Allen, Terry L	VMS	Certificated	Permanent	Teacher - General Ed	8/30/96	05/06/09	5 Year-Perm	Morales, Julio C	1			1	
Anderson, Ronald A	CVA	Certificated	Permanent	Teacher - General Ed	2/3/03	05/12/09	2 Year-Perm		1			1	
Backensto, Karen S	CHE	Certificated	Permanent	Teacher - General Ed	8/29/96	05/11/09	2 Year-Perm	Harden, Leslie	1			1	
Bentley, Patsy G	CHS	Certificated	Permanent	Counselor	10/1/90	05/12/09	2 Year-Perm	Stanchi, Margaret A				0	Counselors not eligible for reimbursement
Bess, Corey H	VMS	Certificated	Permanent	Teacher - General Ed	8/23/07	05/11/09	1 Year-Prob	Morales, Julio C		1		1	
Billingsley, Donna M	PAC	Certificated	Permanent	Teacher - General Ed	9/2/99	06/12/09	2 Year-Perm	Devich, Robert A	1			1	
Bloomquist, Shauna	PAC	Certificated	Permanent	Teacher - General Ed	8/28/97	06/12/09	2 Year-Perm	Devich, Robert A	1			1	
Brisebois, Frances (Beth) B	BV	Certificated	Permanent	Teacher - General Ed	9/6/72	05/07/09	2 Year-Perm	Howard, Tina	1			1	
Browne, Lori A	VMS	Certificated	Permanent	Teacher - General Ed	8/27/01	05/09/09	2 Year-Perm	Morales, Julio C	1			1	
Bullard, Marlene	CHE	Certificated	Permanent	Teacher - ELD Resource	1/3/95	05/12/09	2 Year-Perm	Harden, Leslie	1			1	
Burda, Jan L	AOE	Certificated	Permanent	Teacher - General Ed	9/3/87	05/06/09	5 Year-Perm	Huesing, Kimberly A	1			1	
Burns, Kelley S	VMS	Certificated	Permanent	Teacher - General Ed	2/3/86	05/11/09	5 Year-Perm	Morales, Julio C	1			1	
Byrne, Arlette M	VMS	Certificated	Permanent	Teacher - RWL	9/30/92	05/12/09	5 Year-Perm	Morales, Julio C	1			1	
Byrne, Arlette M	VMS	Certificated	Permanent	Teacher - RWL - CAT	9/30/92	05/12/09	5 Year-Perm	Morales, Julio C				0	Already counted
Carlson, Barbara A	AOE	Certificated	Permanent	Teacher - General Ed	8/27/01	05/01/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Carr, Rodney E	VMS	Certificated	Permanent	Library Media Specialist	11/7/01	05/12/09	2 Year-Perm	Morales, Julio C				0	Already counted
Carr, Rodney E	VMS	Certificated	Permanent	Teacher - Split 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	Holley, Norman 'Keith' K	1			1	
Chavez, N. Yvonne	JEFF	Certificated	Permanent	Teacher - General Ed	8/28/00	05/12/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Co, Brian J	CVA	Certificated	Permanent	Teacher - General Ed	9/8/04	05/12/09	2 Year-Perm	Holley, Norman 'Keith' K	1			1	
Cockerham, Jennifer N	VMS	Certificated	Permanent	Special Ed Teacher - 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	1			1	
Dearie, Kurt R	CHS	Certificated	Permanent	Teacher - General Ed	9/6/84	05/22/09	2 Year-Perm		1			1	
Dodaro, Mark R	AOM	Certificated	Permanent	Teacher - General Ed	9/6/84	05/12/09	2 Year-Perm		1			1	
Doncouse, Estella G	JEFF	Certificated	Permanent	Teacher - General Ed	9/8/94	05/12/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Ecker, Ashley C	VMS	Certificated	Permanent	Teacher - General Ed	8/23/07	05/06/09	1 Year-Prob	Morales, Julio C		1		1	
Fahlstrom, Norma C	CHS	Certificated	Permanent	Counselor	2/28/78	05/12/09	2 Year-Perm	Stanchi, Margaret A				0	Counselors not eligible for reimbursement
Faure-Gault, Livia E	JEFF	Certificated	Permanent	Teacher - General Ed	8/29/96	06/15/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Fearn, Martha K	AOE	Certificated	Permanent	Teacher - General Ed	9/2/93	05/06/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Ferrara, Linda M	KEL	Certificated	Permanent	Special Ed Teacher - Speech/Language	8/28/00	05/11/09	2 Year-Perm	Armstrong, Theresa M	1			1	
Foster, Jeffrey	AOE	Certificated	Permanent	Teacher - General Ed	9/8/94	05/07/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Francois, Cathy V	CHS	Certificated	Permanent	Teacher - ROP	9/10/84	05/12/09	2 Year-Perm					0	Already counted
Francois, Cathy V	CHS	Certificated	Permanent	Teacher - Split Assignment	9/10/84	05/12/09	2 Year-Perm		1			1	
Fuller, Jessica P	POI	Certificated	Permanent	Teacher - General Ed	9/10/03	05/12/09	2 Year-Perm	Ahle, Stephen J	1			1	
Gaccetta, Judith A	CHM	Certificated	Permanent	Special Ed Teacher - Mild/Moderate	9/2/93	05/06/09	2 Year-Perm	Howard, Tina	1			1	
Gallego, Luisa	PAC	Certificated	Permanent	Teacher - General Ed	9/5/85	06/12/09	2 Year-Perm	Devich, Robert A	1			1	
Gerges, Nevine I	CHS	Certificated	Permanent	Psychologist	8/27/04	05/05/09	2 Year-Perm	Stanchi, Margaret A				0	Psychologists not eligible for reimbursement
Gledhill-Mash, Sarah L	DO	Certificated	Permanent	Teacher - ELD Resource	8/28/00	06/18/09	2 Year-Perm	Haines Decharo, 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	
Granberg, Alicia	PAC	Certificated	Permanent	Special Ed Teacher - Mild/Moderate	8/25/06	06/12/09	2 Year-Perm	Devich, Robert A	1			1	
Guillen, Kimberly S	AOE	Certificated	Permanent	Teacher - General Ed	8/27/01	05/01/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Gunner, Caroline	CHE	Certificated	Permanent	Teacher - General Ed	9/4/91	05/11/09	2 Year-Perm	Harden, Leslie	1			1	
Hall, Monica H	CHS	Certificated	Permanent	Teacher - General Ed	9/6/79	05/12/09	2 Year-Perm	Stanchi, Margaret A	1			1	
Hampton, Anne M	PAC	Certificated	Permanent	Teacher - General Ed	1/3/00	06/11/09	2 Year-Perm	Devich, Robert A	1			1	
Harrison, Christine M	AOE	Certificated	Permanent	Teacher - General Ed	8/21/08	04/03/09	1 Year-Prob	Huesing, Kimberly A		1		1	
Heath, Joseph D	AOM	Certificated	Permanent	Teacher - General Ed	8/28/97	05/12/09	2 Year-Perm	Millikin, Carolyn	1			1	
Heberer, Teresa A	JEFF	Certificated	Permanent	Teacher - General Ed	1/2/01	05/06/09	2 Year-Perm	Tubbs, Richard L	1			1	
Hendricks, Dale R	CHS	Certificated	Permanent	Teacher - General Ed	8/29/96	06/18/08	2 Year-Perm	Stanchi, Margaret A	1			1	
Heritage, Kathleen S	CSA	Certificated	Permanent	Teacher - General Ed	3/5/82		2 Year-Perm	Holley, Norman 'Keith' K				0	No evaluation received by the district
Hill, Keatra A	VMS	Certificated	Permanent	Teacher - General Ed	9/2/99	05/08/09	2 Year-Perm	Morales, Julio C	1			1	
Hirschhoff, Heather	POI	Certificated	Permanent	Teacher - General Ed	8/25/06	05/13/09	2 Year-Perm	Ahle, Stephen J	1			1	
Hovis, Christi M	AOM	Certificated	Permanent	Special Ed Teacher - Mild/Moderate	9/8/94	05/12/09	2 Year-Perm	Millikin, Carolyn	1			1	

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The Stull Act Program
Certificated Evaluation Log
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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.

FullName	Site	Class Description	Status	Job Title	Hire Date	Current Eval Recd	Eval Type	Evaluator	Allowable Evaluations				Comments
									Perm	Prob	Temp	Total	
Irwin, Cynthia	AOE	Certificated	Permanent	Teacher - General Ed	8/29/01	05/11/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Jacobs, Nancy S	BV	Certificated	Permanent	Special Ed Teacher - Speech/Language	9/2/99	05/08/09	2 Year-Perm	Howard, Tina	1			1	
Jordan, Twanna L	CHS	Certificated	Permanent	Teacher - General Ed	9/2/93	05/22/09	2 Year-Perm	Stanchi, Margaret A	1			1	
Kimball, Marianne	VMS	Certificated	Permanent	Teacher on Paid LOA	9/8/94	05/12/09	2 Year-Perm		1			1	
Kistler, Karl	CHS	Certificated	Permanent	Teacher - General Ed	1/1/93	05/11/09	2 Year-Perm	Stanchi, Margaret A	1			1	
Kolden, Rosemary C	AOE	Certificated	Permanent	Special Ed Teacher - Mild/Moderate	8/23/07	05/05/09	1 Year-Prob	Huesing, Kimberly A		1		1	
Konieczko, Walter R	PAC	Certificated	Permanent	Teacher - General Ed	8/23/07	06/11/09	1 Year-Prob	Devich, Robert A		1		1	
Kopp, Christine P	JEFF	Certificated	Permanent	Teacher - General Ed	8/27/01	05/16/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Krager, Jessica B	BV	Certificated	Permanent	Special Ed Teacher - 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	Permanent	Teacher - General Ed	9/18/06	05/11/09	2 Year-Perm	Harden, Leslie	1			1	
Langanica, Maria L	JEFF	Certificated	Permanent	Teacher - General Ed	8/27/01	05/12/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Larios, Ana	BV	Certificated	Permanent	Teacher - General Ed	8/27/01	05/08/09	2 Year-Perm	Howard, Tina	1			1	
Laski, Linda J	BV	Certificated	Permanent	Teacher - General Ed	9/2/93	05/08/09	2 Year-Perm	Howard, Tina	1			1	
Lewis, Mia C	VMS	Certificated	Permanent	Teacher - General Ed	8/28/00	05/07/09	2 Year-Perm	Morales, Julio C	1			1	
Little, Shane	BV	Certificated	Permanent	Teacher - General Ed	9/5/85	05/11/09	2 Year-Perm	Howard, Tina	1			1	
Lupica, Melanie K	PAC	Certificated	Permanent	Teacher - General Ed	9/2/99	06/11/09	2 Year-Perm	Devich, Robert A	1			1	
Lyon, Roderick M	CHE	Certificated	Permanent	Teacher - General Ed	8/27/04	05/11/09	2 Year-Perm	Howard, Tina	1			1	
MacPherson, Margaret	BV	Certificated	Permanent	Teacher - General Ed	11/23/92	05/11/09	2 Year-Perm	Howard, Tina	1			1	
Marks, Tracy A	JEFF	Certificated	Permanent	Teacher - General Ed	8/28/97	05/11/09	2 Year-Perm	Armstrong, Theresa M	1			1	
Marner, Rory E	CHE	Certificated	Permanent	Special Ed Teacher - Mild/Moderate	9/8/94	05/12/09	2 Year-Perm	Harden, Leslie	1			1	
Massey, Georgellen	CHS	Certificated	Permanent	Psychologist	8/25/06	05/06/09	2 Year-Perm	Stanchi, Margaret A				0	Psychologists not eligible for reimbursement
Mehring, Courtney M	POI	Certificated	Permanent	Teacher - General Ed	8/23/07	05/12/09	1 Year-Prob	Ahle, Stephen J		1		1	
Merritt, Rae M	JEFF	Certificated	Permanent	Teacher - General Ed	8/29/96	05/05/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Mitchell, Chad J	CHM	Certificated	Permanent	Teacher - General Ed	2/26/98	05/11/09	2 Year-Perm	Hancock, Catina S	1			1	
Mulvey Jr, Arthur F	VMS	Certificated	Permanent	Teacher - General Ed	9/2/99	05/11/09	2 Year-Perm	Morales, Julio C	1			1	
Neptune, Susan E	CHS	Certificated	Permanent	Special Ed Teacher - 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	
Nikodym, Deanna L	BV	Certificated	Permanent	Special Ed Teacher - Speech/Language	8/28/00	05/08/09	2 Year-Perm	Howard, Tina	1			1	
Northridge, Mary N	BV	Certificated	Permanent	Teacher - General Ed	9/6/00	05/08/09	2 Year-Perm	Howard, Tina	1			1	
Norton, Gabie E	CHM	Certificated	Permanent	Teacher - General Ed	8/27/04	05/12/09	2 Year-Perm	Hancock, Catina S	1			1	
Nugent, Therese M	JEFF	Certificated	Permanent	Special Ed Teacher - Speech/Language	12/13/00	05/06/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Oakley, Stephen M	CHS	Certificated	Permanent	Teacher - General Ed	3/14/02		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
O'Brian, Ross D	VMS	Certificated	Permanent	Teacher - General Ed	8/27/04	05/09/09	2 Year-Perm	Morales, Julio C	1			1	
Ogden, James (Scott) S	CHS	Certificated	Permanent	Teacher - General Ed	8/28/00		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Olsen, Gwyneth	MAG	Certificated	Permanent	Special Ed Teacher - DHH	9/9/98		2 Year-Perm	Hines, James C				0	No evaluation received by the district.
Ortman, Juanita	CHS	Certificated	Permanent	Teacher - General Ed	8/25/03		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Orzachowski, Rosemarie M	BV	Certificated	Permanent	Special Ed Teacher - Preschool	8/23/07	05/07/09	1 Year-Prob	Howard, Tina				0	Preschool teachers are not eligible for reimbursement
Owen, Christy E	CHS	Certificated	Permanent	Teacher - Split Assignment	8/27/04		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Owen, Christy E	CHS	Certificated	Permanent	Teacher - Split Assignment	8/27/04		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Palenscar, Thomas Y	CHM	Certificated	Permanent	Teacher - General Ed	10/3/74		5 Year-Perm	Hancock, Catina S				0	No evaluation received by the district.
Palmer, Joey L	POI	Certificated	Permanent	Teacher - General Ed	2/24/98	05/12/09	2 Year-Perm	Ahle, Stephen J	1			1	
Papera, Lisa M	CHS	Certificated	Permanent	Teacher - General Ed	2/6/95		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Park, Valerie C	CHS	Certificated	Permanent	Teacher - General Ed	8/25/03		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Parker, William A	VMS	Certificated	Permanent	Special Ed Teacher - Mild/Moderate	9/5/85	05/11/09	2 Year-Perm	Morales, Julio C	1			1	
Parr, Christine	CHS	Certificated	Permanent	Teacher - General Ed	9/5/90		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Peabody, Janet L	AOM	Certificated	Permanent	Teacher - General Ed	2/3/97	05/12/09	2 Year-Perm	Millikin, Carolyn	1			1	
Peacock, Lorianne	CHS	Certificated	Permanent	Teacher - General Ed	8/29/96		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Peer, Eileen M	JEFF	Certificated	Permanent	Teacher - General Ed	8/29/96	05/28/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Penrod, Susan H	CHS	Certificated	Permanent	Teacher - General Ed	8/25/06		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.

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FullName	Site	Class Description	Status	Job Title	Hire Date	Current Eval Recd	Eval Type	Evaluator	Allowable Evaluations				Comments
									Perm	Prob	Temp	Total	
Philippe, Amanda A	CHS	Certificated	Permanent	Teacher - General Ed	8/26/05		2 Year-Perm	Stanchi, Margaret A				0	No evaluation received by the district.
Pierini, Karissa A	CHM	Certificated	Permanent	Teacher - General Ed	8/25/06		2 Year-Perm					0	No evaluation received by the district.
Pounds, Judith A	PAC	Certificated	Permanent	Teacher - General Ed	11/1/05	06/12/09	2 Year-Perm	Devich, Robert A	1			1	
Primer, Edward D	CHS	Certificated	Permanent	Teacher - General Ed	9/3/98	05/11/09	2 Year-Perm	Stanchi, Margaret A	1			1	
Proctor, Carleen M	VMS	Certificated	Permanent	Teacher - General Ed	8/26/02	05/11/09	2 Year-Perm	Morales, Julio C	1			1	
Pursar, Joseph F	CHM	Certificated	Permanent	Teacher - General Ed	9/7/06	05/12/09	2 Year-Perm	Hancock, Catina S	1			1	
Raymundo, Meredith	CHE	Certificated	Permanent	Teacher - General Ed	8/27/01	05/12/09	2 Year-Perm	Harden, Leslie	1			1	
Redfield, Julia A	CVA	Certificated	Permanent	Counselor	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	Stanchi, Margaret A				0	Biannual teacher, date of last eval was 6/13/08. Reimbursed in FY 2007-08.
Russell, Monique M	AOE	Certificated	Permanent	Teacher - General Ed	8/28/00	05/05/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Sabala, Kelly A	VMS	Certificated	Permanent	Teacher - General Ed	8/25/03	05/06/09	2 Year-Perm	Morales, Julio C	1			1	
Sandoval, Esmeralda C	CHM	Certificated	Permanent	Teacher - General Ed	8/31/95	05/12/09	2 Year-Perm	Hancock, Catina S	1			1	
Schmitz, Cynthia A	CHE	Certificated	Permanent	Special Ed Teacher - Speech/Language	8/27/01	05/12/09	2 Year-Perm	Harden, Leslie	1			1	
Schroh, Melony P	VMS	Certificated	Permanent	Counselor	8/31/00	05/11/09	2 Year-Perm	Morales, Julio C				0	Counselors not eligible for reimbursement
Scott, Linda K	CHS	Certificated	Permanent	Teacher - General Ed	9/2/93	05/12/09	5 Year-Perm	Stanchi, Margaret A	1			1	
Serafin, Jason T	JEFF	Certificated	Permanent	Teacher - General Ed	8/27/01	05/06/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Severino, Julie A	AOE	Certificated	Permanent	Teacher - General Ed	8/27/01	05/05/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Shearer, Kathleen	PAC	Certificated	Permanent	Teacher - General Ed	9/1/00	06/10/09	2 Year-Perm	Devich, Robert A	1			1	
Shepard, Marilyn J	JEFF	Certificated	Permanent	Teacher - General Ed - CAT	9/4/86	05/12/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Slattery, Patricia F	PAC	Certificated	Permanent	Teacher on Paid LOA	8/28/00	06/12/09	2 Year-Perm	Devich, Robert A	1			1	
Slovin, Susan G	AOE	Certificated	Permanent	Special Ed Teacher - Speech/Language	9/8/76	05/05/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Smith, Anne L	JEFF	Certificated	Permanent	Teacher - General Ed	9/7/99	05/17/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Smith, BreeAnn M	VMS	Certificated	Permanent	Teacher - General Ed	8/26/05	05/07/09	2 Year-Perm	Morales, Julio C	1			1	
Smith, Ruthie	VMS	Certificated	Permanent	Teacher - General Ed	9/3/98	05/13/09	2 Year-Perm	Morales, Julio C	1			1	
Spanier, Jeffrey R	CHS	Certificated	Permanent	Teacher - General Ed	9/3/98	05/22/09	2 Year-Perm	Stanchi, Margaret A	1			1	
Stencil, Karen M	JEFF	Certificated	Permanent	Teacher - General Ed - CAT	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	CHM	Certificated	Permanent	Teacher - General Ed	8/26/05	05/12/09	2 Year-Perm	Hancock, Catina S				0	No evaluation received by the district.
Stremel, Suzanne	PAC	Certificated	Permanent	Special Ed Teacher - Mild/Moderate	11/11/03	06/12/09	2 Year-Perm	Devich, Robert A	1			1	
Taylor, Kevin	BV	Certificated	Permanent	Teacher - General Ed	8/29/96	05/08/09	2 Year-Perm	Howard, Tina	1			1	
Tessier, Margaret C	CHS	Certificated	Permanent	Teacher - General Ed	8/25/06	05/12/09	2 Year-Perm	Stanchi, Margaret A	1			1	
Thomas, Shelley M	JEFF	Certificated	Permanent	Project Specialist	9/2/99	05/17/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Tibbels, Mary Jean J	VMS	Certificated	Permanent	Teacher - General Ed	10/3/83	05/11/09	5 Year-Perm	Morales, Julio C	1			1	
Tinnerstet, Gaylor	AOE	Certificated	Permanent	Teacher - General Ed	9/5/85	05/07/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Tipton, Joseph E	CHS	Certificated	Permanent	Teacher - General Ed	9/5/85	05/22/09	5 Year-Perm	Stanchi, Margaret A	1			1	
Tsutagawa Ward, Michele M	JEFF	Certificated	Permanent	Teacher - General Ed	8/29/06	04/22/09	2 Year-Perm	Van Vooren, Carol L	1			1	
Uribe, Jennifer	AOE	Certificated	Permanent	Teacher - General Ed	11/10/94	05/05/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Vallone, Joyce J	INST	Certificated	Permanent	Project Specialist	9/5/90	05/05/09	2 Year-Perm	O'Connell, Suzanne M				0	No evaluation received by the district.
Valverde, Rita	BV	Certificated	Permanent	Teacher - General Ed	9/9/83	05/08/09	2 Year-Perm	Howard, Tina				0	No evaluation received by the district.
Vance, Jennie J	CHM	Certificated	Permanent	Teacher - General Ed	10/19/88	05/08/09	2 Year-Perm	Hancock, Catina S	1			1	
Vasquez, Cynthia L	AOE	Certificated	Permanent	Teacher - General Ed	9/5/90	05/11/09	2 Year-Perm	Huesing, Kimberly A	1			1	
Weatherall, Ellen	AOE	Certificated	Permanent	Teacher - General Ed	9/18/84	05/09/09	5 Year-Perm	Huesing, Kimberly A	1			1	
Wells-Tejada, Rosemary R	VMS	Certificated	Permanent	Teacher - General Ed	9/1/89	05/12/09	2 Year-Perm	Morales, Julio C	1			1	
Wilkinson, Amber D	VMS	Certificated	Permanent	Psychologist	8/16/07	05/11/09	1 Year-Prob	Morales, Julio C				0	Psychologists not eligible for reimbursement
Wong, Shirley A	CHS	Certificated	Permanent	Special Ed Teacher - Speech/Language	8/29/96	05/12/09	2 Year-Perm	Stanchi, Margaret A	1			1	
Yates, Dana M	JEFF	Certificated	Permanent	Special Ed Teacher - Mild/Moderate	11/29/99	05/05/09	2 Year-Perm	Tubbs, Richard L	1			1	
Simpson, Caren A	MAG	Certificated	Prob 1	Special Ed Teacher - Adaptive P.E	3/9/09		1 Year-Prob	Kramer, J. Bruce				0	No evaluation received by the district.
Blehr, Devon R	KEL	Certificated	Prob 2	Special Ed Teacher - Moderate/Severe	1/7/08	05/11/09	1 Year-Prob	Armstrong, Theresa M		1		1	
Levitt, Amanda L	BV	Certificated	Prob 2	Special Ed Teacher - Preschool	12/17/07	05/07/09	1 Year-Prob	Howard, Tina				0	Preschool teachers are not eligible for reimbursement
Lupu, Kelley S	CHE	Certificated	Prob 2	Special Ed Teacher - Moderate/Severe	8/21/08	05/11/09	1 Year-Prob	Hancock, Catina S		1		1	

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Full Name	Site	Class Description	Status	Job Title	Hire Date	Current Eval Recd	Eval Type	Evaluator	Allowable Evaluations				Comments
									Perm	Prob	Temp	Total	
Amatore, Nina	CHM	Certificated	Temp	Teacher - General Ed	3/12/08	05/12/09	1 Year-Temp	Hancock, Catina S			1	1	
Bentley, Ryan D	MAG	Certificated	Temp	Teacher - General Ed	8/21/08	05/01/09	1 Year-Temp	Hines, James C			1	1	
Boyer, Amy M	CHE	Certificated	Temp	Teacher - General Ed	11/10/08	05/11/09	1 Year-Temp	Harden, Leslie			1	1	
Brown, Darcy M	AOE	Certificated	Temp	Teacher - General Ed	9/21/08	05/08/09	1 Year-Temp	Huesing, Kimberly A			1	1	
Cann, David B	KEL	Certificated	Temp	Teacher - General Ed	8/21/08	05/08/09	1 Year-Temp	Armstrong, Theresa M			1	1	
Cate, Elisa	CHS	Certificated	Temp	Special Ed Teacher - Moderate/Severe	8/21/08	03/13/09	1 Year-Temp	Stanchi, Margaret A			1	1	
Cervantes, Jennifer E	KEL	Certificated	Temp	Teacher - General Ed	8/21/08	05/11/09	1 Year-Temp	Armstrong, Theresa M			1	1	
Coulter, Caitlin M	MAG	Certificated	Temp	Teacher - General Ed	11/10/08	05/04/09	1 Year-Temp	Hines, James C			1	1	
De Anda, Corie L	DO	Certificated	Temp	Project Specialist	9/2/03	06/18/09	1 Year-Temp				1	1	
Drake, Maya C	CHE	Certificated	Temp	Teacher - General Ed	8/21/08	05/11/09	1 Year-Temp	Harden, Leslie			1	1	
Edgerly, Stefan	PAC	Certificated	Temp	Teacher - General Ed	8/21/08	05/12/09	1 Year-Temp	Devich, Robert A			1	1	
Eslinger, Megan E	CHS	Certificated	Temp	Teacher - General Ed	3/19/09		1 Year-Temp	Stanchi, Margaret A					0 No evaluation received by the district.
Fleming, Trish L	VMS	Certificated	Temp	Special Ed Teacher - Mild/Moderate	8/23/07	05/11/09	1 Year-Temp	Morales, Julio C			1	1	
Gault, Christina E	AOM	Certificated	Temp	Special Ed Teacher - Moderate/Severe	8/21/08	05/12/09	1 Year-Temp	Millikin, Carolyn			1	1	
Gilbert, Melissa M	POI	Certificated	Temp	Teacher - General Ed	8/23/07	05/12/09	1 Year-Temp	Ahle, Stephen J			1	1	
Green, SueMarie	CHM	Certificated	Temp	Teacher - General Ed - CAT	3/11/09	06/29/09	1 Year-Temp	Hancock, Catina S			1	1	
Jimenez, Joe A	CHS	Certificated	Temp	Teacher - Split Assignment	8/21/08	03/13/09	1 Year-Temp	Stanchi, Margaret A			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	
King, Carol	CHS	Certificated	Temp	Teacher - Split Assignment	8/23/07	03/13/09	1 Year-Temp	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	
King, Krista L	CHS	Certificated	Temp	Teacher - Split Assignment	8/21/08	03/13/09	1 Year-Temp	Stanchi, Margaret A					0 Already counted
Labrum, Steven C	VMS	Certificated	Temp	Special Ed Teacher - Mild/Moderate	8/31/09		1 Year-Temp	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			1	1	
Lee, Joyce C	JEFF	Certificated	Temp	Special Ed Teacher - Mild/Moderate	8/21/08	05/08/09	1 Year-Temp	Van Vooren, Carol L			1	1	
Lyon, Casey	CHS	Certificated	Temp	Special Ed Teacher - Mild/Moderate	8/31/09		1 Year-Temp	Stanchi, Margaret A					0 No evaluation received by the district.
McClelland, Jaikour S	MAG	Certificated	Temp	Teacher - General Ed	8/21/08	05/06/09	1 Year-Temp	Hines, James C			1	1	
Moersch, Nicole C	POI	Certificated	Temp	Teacher - General Ed	9/7/07	05/12/09	1 Year-Temp	Ahle, Stephen J			1	1	
Monroe, Arlene	CVA	Certificated	Temp	Teacher - General Ed	8/25/06	05/12/09	1 Year-Temp	Holley, Norman 'Keith' K			1	1	
Monroe, Arlene	CVA	Certificated	Temp	6/5th -Position-CAT	8/25/06	05/12/09	1 Year-Temp	Holley, Norman 'Keith' K					0 Already counted
Payne, 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	Temp	Special Ed Teacher - Preschool	10/13/08	05/11/09	1 Year-Temp	Howard, Tina					0 Preschool teachers are not eligible for reimbursement
Pike, Jo Ellen	ITINER ANT	Certificated	Temp	Special Ed Teacher - Mild/Moderate	8/31/09		1 Year-Temp	Kramer, J. Bruce					0 No evaluation received by the district.
Policastri, Shelby R	CHE	Certificated	Temp	Special Ed Teacher - Mild/Moderate	10/14/08	05/12/09	1 Year-Temp	Harden, Leslie			1	1	
Rozansky, Julie L	AOE	Certificated	Temp	Teacher - General Ed	2/17/09	05/01/09	1 Year-Temp	Huesing, Kimberly A			1	1	
Ryan, Suzy	VMS	Certificated	Temp	Teacher - General Ed	8/21/08	05/11/09	1 Year-Temp	Morales, Julio C			1	1	
Schmitt, Roberta	MAG	Certificated	Temp	Special Ed Teacher - Mild/Moderate	8/21/08	05/01/10	1 Year-Temp	Hines, James C			1	1	
Soto, Natalie	VMS	Certificated	Temp	Teacher - General Ed	11/5/08	05/11/09	1 Year-Temp	Morales, Julio C			1	1	
Taunt, Jennifer R	BV	Certificated	Temp	Teacher - General Ed	8/21/08	05/07/09	1 Year-Temp	Howard, Tina			1	1	
Vallen, Lori L	VMS	Certificated	Temp	Teacher - Split Assignment	8/23/07	05/11/09	1 Year-Temp	Morales, Julio C			1	1	
Vallen, Lori L	VMS	Certificated	Temp	Teacher - General Ed - CAT	8/23/07	05/11/09	1 Year-Temp	Morales, Julio C					0 Already counted
Webb, Taryn L	CHE	Certificated	Temp	Teacher - General Ed	9/12/07	05/11/09	1 Year-Temp	Harden, Leslie			1	1	
									113	9	32	154	A.6.5
									Less number of Categorical/Grant teachers identified by the district				(7)
												147	

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;

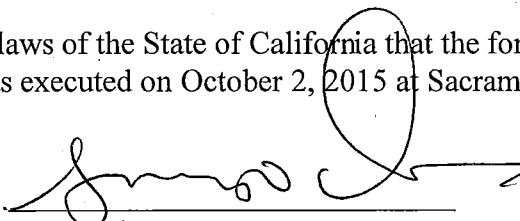
Statutes 1983, Chapter 498; Statutes 1999, Chapter 4

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

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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STATE of CALIFORNIA
**COMMISSION ON STATE
 MANDATES**



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 http://www.csm.ca.gov/dropbox_procedures.php 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

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,¹ 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.² These amendments constitute a very narrow approved program, with a number of limitations and caveats, as stated in the Parameters and Guidelines.³ 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.”⁵ The claimant then conducted a time study “as a substitute for records of actual time spent” on the mandate.⁶ 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.⁷

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.⁸ On January 25, 2008, the claimant filed its fiscal year 2006-2007 reimbursement claim.⁹ On February 13, 2009, the claimant filed its fiscal year 2007-2008 reimbursement claim.¹⁰ On January 29, 2010, the claimant filed its fiscal year 2008-2009 reimbursement claim.¹¹ On June 24, 2010, the Controller issued a letter informing the claimant of the commencement of an audit.¹² On May 5, 2012, the Controller issued the Draft Audit Report.¹³ On May 9, 2012, the claimant responded to the Draft Audit Report.¹⁴ On

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.¹⁵ On June 9, 2015, the claimant filed this IRC.¹⁶ On October 2, 2015, the Controller filed late written comments on the IRC.¹⁷ 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."²⁰

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.	<i>The IRC was timely filed.</i> 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 study that the Controller found were beyond the scope of the mandate correct as matter of law, and not arbitrary, capricious, or entirely lacking in evidentiary support?	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 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 several activities within the time study were beyond the scope of the mandate – including training, planning and preparation activities, evaluation conference activities, and STAR	<i>The reductions are correct as a matter of law and not arbitrary, capricious, or entirely lacking in evidentiary support.</i> Planning and preparation 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 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.

	test evaluation activities – which the Controller found were <i>not</i> reimbursable activities under the Parameters and Guidelines.	mandate, as required by the Parameters and Guidelines.
Was the Controller’s disallowance of 46 of 660 completed evaluations for non-instructional employees and preschool teachers correct as a matter of law?	<p>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:</p> <ul style="list-style-type: none"> • 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. 	<i>The reductions are correct as a matter of law.</i> Non-instructional 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.

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.”³⁰ 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.³⁶ However, the claimant disputes the disallowance of activities related to evaluation conferences, preparation and planning activities, and reviewing STAR test results.³⁷

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.⁴⁰ 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.⁴¹

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."⁴⁴ 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..."⁴⁵

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.*”⁴⁸ 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.⁴⁹ 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.”⁵² 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.⁵³ 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.⁵⁴ 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.⁵⁵ 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.⁶⁸ 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.⁶⁹ 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.⁷⁰ The school district was also required to hold a meeting with the employee to discuss the evaluation.⁷¹

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.⁷² 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. Reimbursement for these prior requirements was denied by the Commission.⁷³

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.⁷⁴ 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.”⁷⁵

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, subs. (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.”⁷⁹ 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 conducted 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).⁸⁰ 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.”⁹⁵

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.”⁹⁶ 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.”⁹⁷ The claimant further notes, “[e]ven the Controller characterizes the parameters and guidelines as an ‘outline.’”⁹⁸ 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-year-tenured 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.¹⁰⁶ 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.”¹⁰⁸ The claimant conducted a time study in fiscal year 2010-2011, “as a substitute for records of actual time spent on teacher evaluations.”¹⁰⁹ 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.¹¹¹ 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.¹¹² 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.”¹¹³ 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.¹¹⁵ 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.”¹¹⁷ 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...’”¹¹⁸ The claimant instead claimed reimbursement for “discussing the STAR results with teachers and how to improve instructional abilities.”¹¹⁹ 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.”¹²⁰

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.¹²⁴ 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.¹³⁰ 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.¹³¹

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.¹³⁶ 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.”¹³⁷ 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.¹³⁸ 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.¹³⁹ 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.”¹⁴⁰ 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:

- *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:

- *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
 - *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;
- 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;
- transmit a copy of the written evaluation to the certificated employee;
- attach any written reaction or response to the evaluation by the certificated employee to the employee's personnel file; and
- 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.¹⁵² 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.¹⁵³ 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.¹⁵⁵ 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.¹⁵⁶ 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 subjects¹⁵⁹ “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.*"¹⁶⁶ 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.¹⁶⁷ 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
 - the instructional techniques and strategies used by the employee; and
 - 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.”¹⁷⁶ 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.”¹⁸¹ 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.¹⁸² 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.¹⁸³ The claimant argues that these employees are *not excluded* by the

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.”

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.”

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.¹⁸⁵ 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.¹⁸⁶ 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 preschool-aged children. The claimant argues that federal special education law requires preschool instruction for pupils when part of a pupil’s Individualized Education Plan.¹⁸⁷ 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.¹⁸⁹ 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).¹⁹⁰ 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.

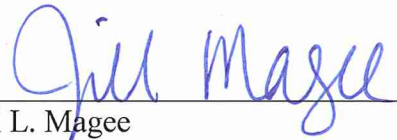
On May 22, 2018, I served the:

- **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
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(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;

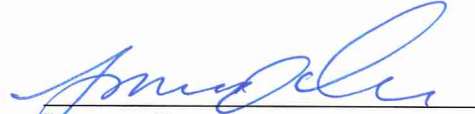
Statutes 1983, Chapter 498; Statutes 1999, Chapter 4

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

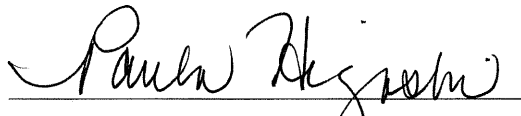
The Stull Act

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

6-1-2004
Date

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 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!

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"⁷ 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 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.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.

¹⁶ *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 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 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 state-mandated 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."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."³⁵ 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*, 30 at Cal.4page749-751.

³⁷ *City of Sacramento*, 50 at Cal.3page57-58.

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 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, 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 Child Nutrition Programs (Ed. Code, §§ 41311, 49536, 49501, 49550, 49552, 49559); Item 6110-204-000 1 – 7th 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 state-mandated 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

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 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 California*⁴⁹, 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.”⁵² 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.”⁵³ 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 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?

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 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 all 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 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 school 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 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?”

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 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.]“

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.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.) 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.⁷⁵ In 1972, the Legislature revisited the Stull Act and expressly excluded certificated personnel employed on an hourly basis in adult education classes.⁷⁶ 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 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.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.*' 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 footnote 3.

⁸³ *Miller v. Chico Unified School District Board of Education* (1979) 24 Cal.3d 703.

⁸⁴ *Id.* page 707.

⁸⁵ *Id.* 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 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.⁸⁹ The analysis of Assembly Bill 3878 by the Assembly Education Committee, dated

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

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 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.”⁹⁴ 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 state-mandated 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 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.)

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.”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 ... 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.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.¹⁰³ 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.

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.“

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.¹¹³ 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.¹¹⁴ In addition, the Act established the Standardized Testing and Reporting Program (otherwise known as the STAR Program) ¹⁵, 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 13485-1 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.

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.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

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, subs. (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

¹²¹ 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. 124.)

- 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 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 (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
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 SORIANO