



December 9, 2016

Mr. Arthur Palkowitz
Artiano Shinoff
2488 Historic Decatur Road, Suite 200
San Diego, CA 92106

Ms. Jill Kanemasu
State Controller's Office
Accounting and Reporting
3301 C Street, Suite 700
Sacramento, CA 95816

And Parties, Interested Parties, and Interested Persons (See Mailing List)

**Re: Draft Proposed Statewide Cost Estimate, Schedule for Comments,
and Notice of Hearing**

*California Assessment of Student Performance and Progress (CAASPP),
14-TC-01 and 14-TC-04*

Education Code Section 60640, as amended by Statutes 2013, Chapter 489 (AB 484)
and Statutes 2014, Chapter 32 (SB 858); California Code of Regulations, Title 5,
Sections 850, 852, 853, 853.5, 857, 861(b)(5), and 864, as added or amended by
Register 2014, Nos. 6, 30, and 35

Plumas County Office of Education, Plumas Unified School District, Porterville Unified
School District, Santa Ana Unified School District, and Vallejo City Unified School
District, Claimants

Dear Mr. Palkowitz and Ms. Kanemasu:

The Draft Proposed Statewide Cost Estimate for the above-named matter is enclosed for your
review.

Written Comments

Written comments on this matter may be filed by **December 19, 2016**.

Hearing

This matter is set for hearing on **Friday, January 27, 2017**, at 10:00 a.m., State Capitol,
Room 447, Sacramento, California. This matter is proposed for the Consent Calendar. Please let
us know in advance if you oppose having this item placed on consent and wish to testify at the
hearing or have a representative testify on your behalf, and if other witnesses will appear.

Sincerely,

Heather Halsey
Executive Director

ITEM ____
DRAFT PROPOSED STATEWIDE COST ESTIMATE
\$139,542,540¹
(Estimated Cost for Fiscal Year 2015-2016 is \$77,854,172)

Education Code Section 60640, as amended by Statutes 2013, Chapter 489 (AB 484) and Statutes 2014, Chapter 32 (SB 858); California Code of Regulations, Title 5, Sections 850, 852, 853, 853.5, 857, 861(b)(5), and 864, as added or amended by Register 2014, Nos. 6, 30, and 35

California Assessment of Student Performance and Progress (CAASPP)
14-TC-01 and 14-TC-04

The Commission on State Mandates (Commission) adopted this Statewide Cost Estimate by a vote of [vote count will be included in the adopted Statewide Cost Estimate] during a regularly scheduled hearing on January 27, 2017 as follows:

Member	Vote
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	
Eraina Ortega, Representative of the Director of the Department of Finance, Chairperson	
Carmen Ramirez, City Council Member	
Don Saylor, County Supervisor	

STAFF ANALYSIS

Background and Summary of the Mandate

On January 22, 2016, the Commission on State Mandates (Commission) adopted the Test Claim Decision² finding that specified provisions of the test claim statutes and regulations impose a reimbursable state-mandated program upon school districts within the meaning of article XIII B, section 6 of the California Constitution and Government Code section 17514. Specifically, the Commission found that the requirement for school districts to provide a computing device, the use of an assessment technology platform, and the adaptive engine to administer the California Assessment of Student Performance and Progress (CAASPP) assessments to all pupils via

¹ For initial reimbursement period of 1.5 fiscal years.

² Exhibit A, Test Claim Decision, Corrected February 4, 2016.

computer, which includes the acquisition of and ongoing compliance with minimum technology requirements, and specified related reporting and informational requirements imposed a new program or higher level of service and costs mandated by the state.

The Decision and Parameters and Guidelines were adopted on March 25, 2016.³

Eligible claimants were required to file initial reimbursement claims with the State Controller's Office (Controller) for costs incurred beginning January 1, 2014 through June 30, 2014 and fiscal year 2014-2015 by October 31, 2016. The Parameters and Guidelines specify the effective dates of each reimbursable activity. Late initial reimbursement claims may be filed until October 31, 2017. Annual reimbursement claims for fiscal year 2015-2016 must be filed by February 15, 2017. Claims filed more than one year after the filing date will not be accepted.

Eligible Claimants and Period of Reimbursement

Any "school district" as defined in Government Code section 17519, except for community colleges, that incurs increased costs as a result of this mandate is eligible to claim reimbursement.

Government Code section 17557(e) states that a test claim shall be submitted on or before June 30 following a given fiscal year to establish eligibility for reimbursement for that fiscal year. The claimants filed test claim 14-TC-01 on December 23, 2014. On March 17, 2015, claimants filed an amended test claim on 14-TC-01, to replace the original filing. On June 26, 2015, a second test claim (14-TC-04) was filed and consolidated with 14-TC-01. These test claims, all filed before June 30, 2015, establish eligibility for reimbursement pursuant to Government Code section 17557(e), beginning July 1, 2013. However, because the test claim statute and regulations each have later effective dates, the period of reimbursement begins on the effective date of each statute or regulation that imposes the reimbursable state-mandated activity, as specified in Section IV. of the Parameters and Guidelines.

Reimbursable Activities

The Parameters and Guidelines authorize reimbursement of each eligible claimant that incurs increased costs, for the following activities, as follow:

- A. Beginning January 1, 2014, provide "a computing device, the use of an assessment technology platform, and the adaptive engine" to administer the CAASPP assessments to all pupils via computer, which includes the acquisition of and ongoing compliance with minimum technology specifications, as identified by the CAASPP contractor(s) or consortium.⁴ Reimbursement for this activity includes the following:
 1. A sufficient number of desktop or laptop computers, iPads, or other tablet computers for which Smarter Balanced provides secure browser support in the academic year, along with a keyboard, headphones, and a pointing device for each, to administer the

³ Exhibit B, Decision and Parameters and Guidelines.

⁴ Education Code section 60640 (Stats. 2013, ch. 489), interpreted in light of California Code of Regulations, title 5, sections 850, 853, 853.5, and 857 (Register 2014, Nos. 6, 30, 35).

CAASPP to all eligible pupils within the testing window provided by CDE regulations.⁵

2. Broadband internet service providing at least 20 Kbps per pupil to be tested simultaneously, costs for acquisition and installation of wireless or wired network equipment, and hiring consultants or engineers to assist a district in completing and troubleshooting the installation.

Claimants shall maintain supporting documentation showing how their existing inventory of computing devices and accessories, technology infrastructure, and broadband internet service is not sufficient to administer the CAASPP test to all eligible pupils in the testing window, based on the minimum technical specifications identified by the contractor(s) or consortium.

Reimbursement is NOT required to provide a computing device for every pupil, for the time to assess each pupil, or for the purchase of other equipment not listed.

- B. Beginning February 3, 2014, the LEA CAASPP coordinator shall be responsible for assessment technology, and shall ensure current and ongoing compliance with minimum technology specifications as identified by the CAASPP contractor(s) or consortium.⁶
- C. Beginning February 3, 2014, notify parents or guardians each year of their pupil's participation in the CAASPP assessment system, including notification that notwithstanding any other provision of law, a parent's or guardian's written request to excuse his or her child from any or all parts of the CAASPP assessments shall be granted.⁷
- D. Beginning February 3, 2014, score and transmit the CAASPP tests in accordance with manuals or other instructions provided by the contractor or CDE.⁸
- E. Beginning February 3, 2014, identify pupils unable to access the computer-based version of the CAASPP tests; and report to the CAASPP contractor the number of pupils unable to access the computer-based version of the test.⁹
- F. Beginning February 3, 2014, report to CDE if a pupil in grade 2 was administered a diagnostic assessment in language arts and mathematics that is aligned to the common core academic content standards pursuant to Education Code section 60644.¹⁰
- G. Beginning February 3, 2014, comply with any and all requests from CAASPP contractors, and abide by any and all instructions provided by the CAASPP contractor or consortium, whether written or oral, that are provided for training or provided for in the

⁵ California Code of Regulations, title 5, section 855 (Register 2014, Nos. 6, 30, 35).

⁶ California Code of Regulations, title 5, section 857(d) (Register 2014, No. 6).

⁷ California Code of Regulations, title 5, section 852 (Register 2014, No. 6).

⁸ California Code of Regulations, title 5, section 853 (Register 2014, No. 6).

⁹ California Code of Regulations, title 5, section 857(a) (Register 2014, No. 6).

¹⁰ California Code of Regulations, title 5, section 861(b)(5) (Register 2014, No. 6).

administration of a CAASPP test.¹¹ Only participation in the training directed by the CAASPP contractor or consortium is reimbursable as follows:

1. *All LEA CAASPP Coordinators, CAASPP Test Site Coordinators (SCs), Test Administrators (TAs), and school administrative staff who will be involved in the Smarter Balanced assessment administration to review the applicable supplemental videos and archived Webcasts, which can be found on the CAASPP Current Administration Training Web page at <http://caaspp.org/training/caaspp/>.*
2. *Prior to administering a test, Test Administrators (and any other individuals who will be administering any secure Smarter Balanced assessment) to read the CAASPP Smarter Balanced Online Test Administration Manual, the Smarter Balanced Usability, Accessibility, and Accommodations Guidelines, and the Test Administrator (TA) Reference Guide, and view the associated Smarter Balanced training modules. All of these documents are linked on the CAASPP Instructions and Manuals Web page at <http://caaspp.org/administration/instructions/>.*

H. Beginning August 27, 2014, the CAASPP test site coordinator shall be responsible for ensuring that all designated supports, accommodations and individualized aids are entered into the registration system.¹²

Offsetting Revenues and Reimbursements

The Parameters and Guidelines provide:

The following state and federal funds must be identified as offsetting revenues:

- Statutes 2013, chapter 48 (\$1.25 billion in Common Core implementation funding), *if* used by a school district on any of the reimbursable CAASPP activities to support the administration of computer-based assessments.
- Funding apportioned by SBE from Statutes 2014, chapter 25, Line Item 6110-113-0001, schedule (8), for fiscal year 2013-2014 CAASPP costs.
- Funding apportioned by SBE from Statutes 2015, chapter 10, Line Item 6100-113-0001, schedule (7) for fiscal year 2014-2015 CAASPP costs.
- Statutes 2014, chapter 25 (Line Item 6110-488) and chapter 32 (appropriation for outstanding mandate claims) *if* used by a school district on any of the reimbursable CAASPP activities.
- Statutes 2014, chapter 25, Line Item 6110-182-0001, Provision 2 (appropriation “to support network connectivity infrastructure grants) *if* used by a school district on any of the reimbursable CAASPP activities.

Any other offsetting revenue the claimant experiences in the same program as a result of the same statutes or executive orders found to contain the mandate shall be deducted from the costs claimed. In addition, reimbursement for this mandate from any source, including but

¹¹ California Code of Regulations, title 5, section 864 (Register 2014, No. 6).

¹² California Code of Regulations, title 5, section 858(d) (Register 2014, No. 35).

not limited to, service fees collected, federal funds, and other applicable state funds, shall be identified and deducted from any claim submitted for reimbursement.

Statewide Cost Estimate

Commission staff reviewed the reimbursement claims submitted by 427 school districts and data compiled by the Controller.¹³ The unaudited reimbursement claims total \$73,457,002 for the period beginning January 1, 2014 through June 30, 2014, and \$66,085,538 for fiscal year 2014-2015.

Assumptions

Based on the claims data, staff made the following assumptions and used the following methodology to develop a statewide cost estimate for this program.

- *The annual amount claimed for reimbursement may increase and exceed this Statewide Cost Estimate.*

There are currently 1050 school districts in California. Of those, only 427 school districts filed reimbursement claims, totaling \$73,457,002 for the initial reimbursement period of January 1, 2014 through June 30, 2014 and \$66,085,538 for fiscal year 2014-2015. If other eligible claimants file late or amended claims, the amount of reimbursement claims may exceed the Statewide Cost Estimate. Late initial claims for the period of January 1, 2014 through June 30, 2014 and fiscal year 2014-2015 may be filed until October 31, 2017.

There also may be several reasons that non-claiming districts did not file reimbursement claims, including but not limited to: they did not incur costs of more than \$1,000 within the six-month reimbursement period of January 1, 2014 through June 30, 2014 or during fiscal year 2014-2015.¹⁴ It is also possible that it was determined not to be worth the time and effort to go through the claiming process for districts with relatively low reimbursable costs after offsets are accounted for. Districts may also have incurred costs to begin implementation of the program prior to the beginning of the reimbursement period, and those costs would not be reimbursable since they were not yet state-mandated.¹⁵

¹³ Claims Data Summary reported as of November 18, 2016.

¹⁴ Although all districts likely had costs exceeding \$1000, significant offsetting and potentially offsetting revenues were appropriated for and received by schools such that some may not have experienced \$1000 in remaining reimbursable costs after accounting for these offsets: Statutes 2013, chapter 48 (\$1.25 billion in Common Core implementation funding); Statutes 2014, chapter 25, Line Item 6110-113-0001, schedule (8), for fiscal year 2013-2014 CAASPP costs; Statutes 2015, chapter 10, Line Item 6100-113-0001, schedule (7) for fiscal year 2014-2015 CAASPP costs; Statutes 2014, chapter 25 (Line Item 6110-488) and chapter 32 (appropriation for outstanding mandate claims); Statutes 2014, chapter 25, Line Item 6110-182-0001, Provision 2 (appropriation “to support network connectivity infrastructure grants) if used by a school district on any of the reimbursable CAASPP activities.

¹⁵ California adopted the Common Core State Standards in 2010, and after Statutes 2013, chapter 489 was enacted, but before it became operative on January 1, 2014, school districts began

- *The total amount of reimbursement for this program may be lower than the Statewide Cost Estimate based on the Controller's audit findings.*

The Controller may conduct audits and reduce any claim it deems to be excessive or unreasonable. Therefore, costs may be lower than the Statewide Cost Estimate based on the Controller's audit findings. The approved activities are narrowly defined in the Parameters and Guidelines and it is likely that activities that were denied but which are closely related to approved activities may be claimed inadvertently.

- *The total amount of reimbursement for this program may increase or decrease proportionately with the growth or reduction in the number and position classification of personnel participating in the training directed by the CAASPP contractor or consortium.*

The future annual costs of this program have direct correlation with the number and position classification of school district personnel participating in the online training for reviewing the applicable supplemental videos and archived Webcast and online manuals and is based on the actual claims, which calculate training costs by multiplying the employee's salary by the time used to complete accessing and completing training modules.

- *The total amount of reimbursement will depend upon the school districts' need to initially acquire and comply with ongoing minimum technology specifications, as identified by CAASPP contractor or consortium.*

This assumption is based on the actual claims from the period beginning January 1, 2014 through June 30, 2014 and fiscal year 2014-2015 where the cost claimed by each school district decreased or increased proportionally with the purchase of the computing devices which included the cost of labor for installation and troubleshooting based on employee's salary multiplied by the amount of time. Most claims filed for the January 1, 2014 through June 30, 2014 for the cost of fixed assets, equipment, materials, and supplies are higher than the claims for fiscal year 2014-2015 when the school district initially purchased the equipment to implement the minimum technology specifications required by the program. However, there were more claims and some school districts claimed a higher cost of technology implementation in fiscal year 2014-2015 if less or no implementation took place in January 1, 2014 through June 30, 2014.

- *The future costs of this program will further depend upon the school districts' claiming the occurrence and frequency of: 1) the CAASPP coordinator ensuring current and ongoing compliance; 2) notifying parents; and 3) scoring and transmitting the CAASPP test.*

The future cost of the program is directly related to the number and position classification of the employees responsible for the assessment. The assumption is that larger school districts will have a higher number of coordinators and specified employees required to perform these duties and thus a higher cost.

preparing for the 2014 field test. (See *Report and Recommendations for the Full Implementation of Smarter Balanced Summative Assessments*, page 11.)

- *The future costs of this program will be directly affected by the amount of state and federal funds available and identified as offsetting revenues.*

Pursuant to the Parameters and Guidelines, school districts must identify and deduct offsetting revenue from the costs claimed.

Methodology

The Statewide Cost Estimate for the period of January 1, 2014 through June 30, 2014 and fiscal year 2014-2015 was developed by totaling the 427 unaudited, reimbursement claims filed with the Controller.

Following is a breakdown of estimated total costs per reimbursement period:

Table A

Reimbursement Period	Number of Initial Claims Filed	Cost
January 1, 2014 through June 30, 2014	197	\$73,457,002
Fiscal Year 2014-2015	230	\$66,085,538
TOTAL	427	\$139,542,540

The first calculation of the Statewide Cost Estimate for fiscal year 2015-2016 (Table B) was developed by projecting a 13.10 percent ratio decrease in the cost of the claims from only the 170 school districts that submitted claims for *both* the initial claiming periods: January 1, 2014 through June 30, 2014 *and* fiscal year 2014-2015.

The costs in Table B for the two reimbursement periods primarily represent the costs claimed for the on-going reimbursable activities beginning February 3, 2014 and August 27, 2014¹⁶ such as for the CAASPP coordinator to ensure current and ongoing compliance; notifying parents; scoring and transmitting the CAASPP test; identifying pupils unable to access the CAASPP tests; participating in training; for the site coordinator to ensure all supports, accommodations, and aids are entered into the system. The costs of activities beginning January 1, 2014 including providing a computing device and the adaptive engine to administer the tests were significantly offset by offsetting revenue.

For example, one school district submitted a reimbursement claim for January 1, 2014 through June 30, 2014 of \$3,769,974; \$3,735,636 for the cost of computing devices and \$34,338 for on-going activities. The school district applied offsetting revenue of \$3,707,660 in federal funds for a net claim of \$62,314. The same school district submitted a reimbursement claim for fiscal year 2014-2015 of \$175,264; \$90,446 for the cost of computing devices and \$84,818 for on-going activities. The school district applied offsetting revenue of \$68,327 in funding apportioned by State Board of Education (SBE) from Chapter 25, statutes 2014, Line Item 6110-113-0001, schedule (8) for 2013-2014 CAASPP costs and \$71,166 in federal funds for a net claim of \$31,771.

Another school district submitted a reimbursement claim for January 1, 2014 through June 30, 2014 of \$785,924; \$783,027 for the cost of computing devices and broadband internet

¹⁶ Exhibit B, Parameters and Guidelines, pages 4-5.

and \$2,897 for on-going activities. The school district applied offsetting revenue of \$568,752 in funding appropriated by statutes 2013, Chapter 48 (Common Core Implementation Funding) and \$161,785 in federal funds for a net claim of \$55,387. The same school district submitted a reimbursement claim for fiscal year 2014-2015 of \$187,190; \$168,278 for the cost of computing devices and \$18,912 for on-going activities. The school district applied offsetting revenue of \$11,121 in funding apportioned by SBE from Chapter 10, statutes 2015, Line Item 6100-113-0001, schedule (7), for fiscal year 2014-2015 CAASPP costs and \$20,187 in federal funds for a net claim of \$155,882.

Yet another school district submitted a reimbursement claim for the period January 1, 2014 through June 30, 2014 of \$11,307; \$2,278 for the cost of computing devices and \$9,029 for on-going activities. The school district applied offsetting revenue of \$2,346 in funding apportioned by SBE from Chapter 25, statutes 2014, Line Item 6110-113-0001, schedule (8) for 2013-2014 CAASPP costs, for a net claim of \$8,961. The same district submitted a reimbursement claim for fiscal year 2014-2015 of \$11,496; \$1,085 for the cost of computing devices and \$10,411 for on-going activities. The school district applied offsetting revenue of \$2,382 in funding apportioned by SBE from Chapter 10, statutes 2015, Line Item 6100-113-0001, schedule (7), for fiscal year 2014-2015 CAASPP costs, for a net claim of \$9,114.

Table B

170 School Districts Submitted Claims for Both Reimbursement Periods	Cost
January 1, 2014 through June 30, 2014	\$73,181,910
Fiscal Year 2014-2015	\$63,591,846
RATIO	-13.10%
VARIANCE AMOUNT	(\$9,590,064)
2015-2016 Estimate	\$55,261,314

This projected amount was calculated as the result of lesser cost between the two claiming periods of purchasing pursuant to section A.1. of the Controller’s Claiming Instructions “A sufficient number of desktop or laptop computers, iPads, or other tablet computers...” of Materials and Supplies (e) and Fixed Assets (g) as this was a greater initial material purchase and the costs are unlikely to be as high in subsequent years. Therefore, the cost estimate of the 170 school districts that are most likely to submit claims again for fiscal year 2015-2016 is \$55,261,314.

Additionally, there were 27 school districts that submitted claims *only* for the claiming period January 1, 2014 through June 30, 2014 and 60 other school districts that submitted claims *only* for fiscal year 2014-2015.

Table C

Reimbursement Period	Number of School Districts Submitting Claims in Only One Reimbursement Period	Cost
January 1, 2014 through June 30, 2014	27	\$275,091
Fiscal Year 2014-2015	60	\$2,493,693
RATIO		806%
VARIANCE AMOUNT		\$2,218,602
2015-2016 Estimate		\$22,592,858

This next projected amount (Table C) was calculated similarly to the calculation in Table B in that the ratio variance was applied from fiscal year 2014-2015 to fiscal year 2015-2016 to total \$22,592,858.

Therefore, the total estimated cost for fiscal year 2015-2016 is \$77,854,172 (\$55,261,314 (Table B) + \$22,592,858 (Table C)).

If the above ratio formulas are also applied to the number of school districts submitting claims for fiscal year 2015-2016, the calculation is as follows:

Table D

Reimbursement Period	Number of School Districts
January 1, 2014 through June 30, 2014	27
Fiscal Year 2014-2015	60
RATIO	122.22%
VARIANCE AMOUNT	33
Increased Number of School Districts Submitting Claims for Fiscal Year 2015-2016	133
TOTAL	303

Accordingly, the total estimated number of school districts that will be submit claims for fiscal year 2015-2016 is 303 (170 claims that were submitted in both reimbursement periods plus another 133 new claims).

In summary, the Statewide Cost Estimate for fiscal year 2015-2016 is 303 claims totaling \$77,854,172.

Draft Proposed Statewide Cost Estimate

On December 9, 2016, Commission staff issued the Draft Proposed Statewide Cost Estimate.

Staff Recommendation

Staff recommends that the Commission adopt this Proposed Statewide Cost Estimate of \$139,542,540 for the period January 1, 2014 through June 30, 2014 and fiscal year 2014-2015 and the estimated cost for fiscal year 2015-2016 of 77,854,172.

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 December 9, 2016, I served the:

**Draft Proposed Statewide Cost Estimate, Schedule for Comments,
and Notice of Hearing**

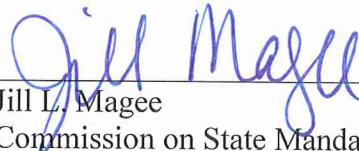
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Plumas County Office of Education, Plumas Unified School District, Porterville Unified
School District, Santa Ana Unified School District, and Vallejo City Unified School
District, Claimants

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 December 9, 2016 at Sacramento,
California.



Jill L. Magee
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COMMISSION ON STATE MANDATES

Mailing List

Last Updated: 9/14/16

Claim Number: 14-TC-01 and 14-TC-04

Matter: California Assessment of Student Performance and Progress (CAASPP)

Claimants: Plumas County Office of Education
Plumas Unified School District
Porterville Unified School District
Santa Ana Unified School District
Vallejo City 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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