



**SSDA**

**SMALL SCHOOL DISTRICTS' ASSOCIATION**

# NEWSLETTER

Please visit [www.ssda.org](http://www.ssda.org): For Weekly News Updates

Highlights from SSDA's 2011-12 New Superintendents Symposium held in Sacramento on July 21-22, 2011, with quotes from some of the 48 participants.....

David Walrath,  
SSDA Legislative  
Advocate



*"Yikes! Each one of these sessions is worthy of a full week/month seminar!"*



*"Thank you for all of the valuable information. Particularly Ron Bennett and Tom Gauthier."*



*"Great Q&A with DWK at dinner! Good idea!"*



*"Great Job!"*



*"Excellent 2-day Workshop!"*



*"Great dinner!"*

*"Also, loved making contact with your Associates"*



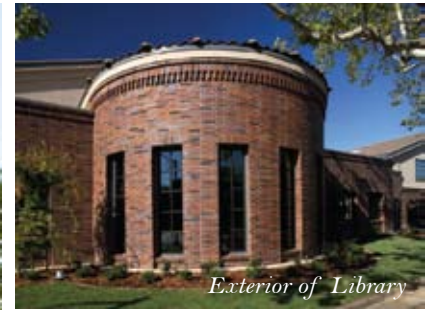
*"Thank you for the GREAT information"*



## SSDA Unveils a "New Membership Package Plan"

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# Federal Debt And Deficit Action Will Affect California Public Schools

Submitted by: David Walrath - SSDA Legislative Advocate



Now that the first round of the federal debt ceiling and deficit reduction slugfest is over, it is time to start looking at how those actions could affect California public school funding during the next five years. The deficit reduction will occur through a two-step process. The first step will primarily make reductions in what are called discretionary programs. The first set of reductions would be approximately \$900 billion over the next decade and probably will limit growth in total discretionary program spending. Because education programs are considered as part of the discretionary budget, California schools probably will be affected by this deficit reduction. The actual effects, however, will be determined by the Appropriations Committees in the United States Senate and House of Representatives. They will translate deficit reduction into specific appropriations for the next federal fiscal year. At the same time the Appropriations Committees are working on the first deficit reduction step, a new special "Super Committee" will be working on the second step for \$1.5 trillion in additional deficit reduction during the next decade. The Super Committee is expected to complete its actions and reduction recommendations by November 2011. The second step could be included in either the 2011-12 Appropriations bills being considered by the Appropriations Committees or deferred to the 2012-13 Appropriations bills. Because schools are forward funded, any new deficit reduction actions should not have an effect on the 2011-12 school funding.


There is a high probability that 2012-13 total education funding will not grow to reflect population increases or inflationary costs. How that total funding will be allocated among various federal education programs is unknown at this time, but SSDA will update members as the Appropriations Committees complete their work and as the Super Committee completes its work.

Although the specifics are unclear, the general direction of federal funding is clear. The general direction is either an absolute reduction in education funding, no inflationary adjustments or population adjustments in total funding. School districts should not anticipate an expanded "pie" of education funding. Instead school districts should expect that there will be greater efforts

to eliminate some programs in order to provide funding increases for other programs.

SSDA has an active federal advocacy program. At a minimum we will be advocating for increased funding to achieve Elementary and Secondary Education Act Title 1 formula fairness and restore the Title 1 funding that has been taken from small school districts and sent to larger districts. The Title 1 number weighting formulas have penalized small school districts. Eliminating this penalty and reversing the reallocation is an SSDA priority.

SSDA federal funding priorities also include: 1) funding for the federal 40 percent of excess costs obligation for the Individuals with Disability Education Act; 2) expanded funding for the Rural Education Achievement Program; and 3) continuation of the Secure Rural Schools and Community Self-Determination program.



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# Small Schools To Get Big Help In Food Purchasing

Submitted by: John Krebs – Axis Purchasing

## SSDA Partners With Axis Purchasing

With all the recent changes in the nutrition guidelines, the rising price of food, and tight budgets, many SSDA Members find food purchasing more challenging than ever. Fortunately, SSDA has a new resource at its disposal: Axis Purchasing. Axis uses billions of dollars in purchasing clout to bring low pricing agreements to schools, wielding the sort of leverage individual schools just don't have on their own. The best part is, there's no out-of-pocket expense to SSDA members and there's no need to change distributors.

## Highlights of the Program

Axis has agreements with over 300 national manufacturers, representing thousands of products. As an SSDA Member and Axis program participant, you will receive rebates in addition to low-cost contract pricing with distributors and gain valuable access to new product opportunities. In addition to food and beverage, you can access favorable pricing on supplies, office products, small wares, and equipment.

Axis also offers back office expertise and personnel support when needed to help your operation become more efficient without increasing staffing or your workload.

## No Learning Curve

"The key to our success," says John Krebs, President of Axis Purchasing, "is that we know how to bring schools savings and convenience without upsetting their present operation. Continuity is absolutely vital to success". We make sure schools can continue to take advantage of any existing programs they find beneficial. There's no minimum requirement to participate, and there's no need to change distributors."

John says his company works hard to create a seamless transition.

"The only real difference you see, day-to-day, is the amount of money you save and the added confidence you get from buying the right products for the job at the right price."

## Getting Your School on Board

Whether we have a food pyramid or a "nutrition plate," the bottom line is feeding students well with the budget that's available. Axis may be able to create new efficiencies that can stretch your budget so you can be more responsive to market changes, as well as to the needs of your students, your school, and local and federal guidelines.

To become a participant or for more information regarding the SSDA Axis program, please contact John Krebs at (703) 310-7601 [johnckrebs@axispurchasing.com](mailto:johnckrebs@axispurchasing.com) or you may wish to visit us at [www.axispurchasing.com](http://www.axispurchasing.com).

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# The rules of nutrition may change, but the rules of economics don't.

**W**ith all the dramatic changes to school lunch menus and the “nutrition plate” replacing the food pyramid, it’s a good time to reassess how you manage your entire school lunch operation.

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# A Blueprint For Great Schools Unveiled By State Superintendent Tom Torlakson

*This article will focus on some of the recommendations that could have the greatest impact on small school districts.*

## Current California Context

Currently, California spends just over half as much as states with comparable costs of living, such as New York, New Jersey, and Connecticut (about \$9,000 per pupil in California as compared to over \$17,000 per pupil in these states)

Most of the schools in the state's cities spend just at or below the state average, and poor rural districts spend even less.

There are inequities in the ability of school districts to recruit and retain highly qualified staff. For example, a teacher with 10 years of experience and a Bachelor's degree plus 60 additional credits (about the median salary), could earn \$41,000 in one district and \$117,000 in another.

Not surprisingly, low-salary districts serve predominantly students of color and low-income students, and have more than twice as many English learners as high-salary districts. They also have nearly twice as many teachers who are uncredentialed and inexperienced, and who have lower levels of education.

## Recommendations

### Educator Quality

**Encourage the development of more effective educator evaluation systems** based on professional teacher and leader standards that guide and assess practice in a way that reflects best practices and incorporates appropriate evidence of student learning. Make sure these systems are supported by training for evaluators, mentoring for teachers, and professional development programs.

**Equalize the distribution of well-qualified and effective teachers** by leveraging more equitable salaries and working conditions, using service scholarships and National Board stipends to recruit excellent teachers to high-need schools, and - because leaders are the single most important element in retaining teachers - developing strong leaders for all schools.

### Curriculum and Assessment

**In collaboration with the State Board of Education, revise California's curriculum standards, frameworks, and assessments** to better reflect the demands of a technologically-driven, knowledge-based society, incorporate CCS, and accommodate and build on the strengths of diverse learners.

**Revise the instructional materials adoption process** to allow more timely access to a greater array of instructional materials, including digital materials.

**Facilitate the infusion of 1:1 computing in school, after school, and in the home;** provide devices, Internet access, new digital curriculum materials, capacity for ongoing diagnostic assessment, professional development and network support; and institute an open standard for the exchange of educational information.

### Higher Education and Secondary Alignment

**Remove regulatory and fiscal barriers to dual enrollment** of high school students in college coursework to engage in rigorous curricular pathways in aligned sequences leading to bachelor's degrees or career-technical education credit.

### Accountability and School Improvement

**Develop a robust system of indicators to inform school accountability,** including broader measures of student learning that focus on growth and better assess 21st century skills; measures of school capacity and student opportunities to learn; and measures of resources connected to Opportunity-to-Learn standards that describe the financial and human resources available to schools and help set targets for a system that ensures schools the resources they need.

### Early Childhood Education

**Develop an infrastructure for a birth-to-grade-three system** that includes readiness data, and aligned standards/assessment, curriculum, and professional development.

**Develop a comprehensive system of supports for children,** including maternal education and infant home visitation programs to support parent information about health and education supports for their children; and developmental screenings in early childhood settings.

.....Continuation from page 6

**Improve pre- and in-service training for early childhood teachers and classified staff** by setting standards, evaluating workforce needs, and developing strong training models.

**Design and fund universal transitional kindergarten programs** that are culturally and linguistically appropriate and inclusive in all local districts.

### **Education Supports**

**Support flexible use of federal after school program funds** for various kinds of expanded learning models (before and after school programs, summer learning, and extended school day or school redesign efforts), with a mandate for strong community partnerships and enrichment in every model.

### **Health Nutrition and Physical Fitness**

**Help connect eligible children to health coverage** by working with appropriate state entities to design school-outreach strategies.

**Incorporate measures of physical education opportunities and performance into accountability structures**, such as the new Academic Performance Index.

### **School Finance Key Recommendations**

#### **Encourage efficiencies by:**

Creating a repository of best practices for efficient operations and working with districts to support their use; Incentivizing district consolidation where it will produce economies of scale;

Creating a mechanism within CDE to enable pooled purchasing by districts; and Facilitating and supporting the best uses of technology for both operations and instruction; re-examining requirements (e.g., seat time, textbook adoption) that might impede efficiencies that could accompany emerging technologies.

**Proactively support needy districts in setting up effective systems** in areas such as procurement, transportation, facilities, food service, maintenance, transportation, etc., rather than waiting until a district reaches a crisis point and needs substantial intervention.

**Seek responsible ways to reduce mandates and extend flexibility** for use of funds; move more of the

school budget into general support rather than categorical funding streams that make efficient management much more difficult.

**Create a weighted student formula approach to funding**, with most K-12 funding streams consolidated into core formula funding, supplemented by a small number of block grants to ensure that students who are at risk or high cost would receive the services they need.

**Seek new revenue sources for schools:** At the state level, explore taxes on selected sales and services; at the federal level, initiate efforts to recapture more of the imbalance in funds between California and the federal government.

**Seek legislation to allow districts to pass parcel taxes** with a 55 percent majority vote.

### **Facilities Construction and Reform Key Recommendations**

**Collaborate with the Governor to consolidate or better coordinate agencies** that have responsibility for facilities design and approval to streamline the process of developing facilities.

**Foster joint use agreements that support schools as community hubs** and create efficiencies with other community service providers.

The Blueprint does not have a timeframe for implementing its recommendations. SSDA will work with the Superintendent, State Board of Education, their staffs, the Administration and the Legislature as the recommendations are placed into legislation, state budget or regulatory implementation.

For the complete report, please visit:

<http://www.cde.ca.gov/eo/in/bp/bpcontents.asp>



# Financial Planning And Major Life Events

Submitted by: Art Wexler - VALIC

A customized financial plan gives you a blueprint to build toward your goal of a secure retirement. Once your plan is set, you should monitor it to make sure you're staying on track but, generally speaking, you shouldn't tinker with it – like reacting to every little bump in the stock market. However, major life events, like marriage, the birth or adoption of a child, or a new job, should trigger a serious review of your finances and perhaps adjustments to integrate with your new situation.

## ***Marital status changes things***

Few life changes can be as profound as a change in marital status. Getting married likely means a combined income – and a review of your long- and short-term savings goals and insurance policies. A marriage ending likewise triggers financial changes. Divorce can trigger legal expenses, dividing property and loss of income. In the case of the death of a spouse, there will be funeral expenses along with possible loss of income and insurance settlements. Any change in marital status should, at a minimum, have you reviewing all your beneficiary designations to see if they're still relevant.

## ***Baby makes three (or more!)***

A new child in the household triggers more financial changes than the purchase of teddy bears and tiny shoes. Your long-term financial plan will require adjustment as you devote some of your resources to future educational expenses for your new scholar. You should also review

your insurance policies to ensure they are adequate, and reconsider your beneficiary designations as well.

## ***New job? Time for a financial review***

Moving on up to a new job is also a great time to review your financial plan in light of your new circumstances. First, you may want to consider saving more to your employer's retirement plan – especially if you're now earning more. Next, review the distribution provisions of your former employer's retirement plan and see if it makes sense to roll those assets over to your new employer's plan or to an IRA. Meet with your financial advisor to determine if your savings plan is on track to meet your goals. If not, what can you do to jumpstart your financial plan?

## ***Pre-retirement financial planning***

If you're nearing retirement age, we suggest meeting with your VALIC financial advisor to assess your current savings and determine if you're on track to save enough for a secure retirement. You can work together to project your income needs in retirement and explore your options for an income you cannot outlive. After all, your retirement could last 25 years or more, so it's a good idea to get an understanding of how much you might need over the years.

Want to learn more? Contact the VALIC Northwest Regional Office at (916) 780-6000 or email Art Wexler, Director of CA Education, at [art.wexler@valic.com](mailto:art.wexler@valic.com).

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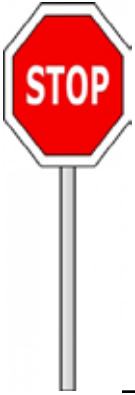
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# Negotiating Under The Gun – Confronting The AB 114 Budget Triggers

Submitted by: Gregory J. Dannis - Dannis Woliver Kelley (DWK)

Most of you are aware of the extraordinary terms of AB 114 including:

- Requiring projection of the same level of revenue and maintaining a “commensurate” level of staffing and programs in 2011-2012 as occurred in 2010-2011;
- Eliminating county superintendents’ authority to require multiyear projections for approval of 2011-2012 school district budgets;
- Implementing mid-year reductions based on whether anticipated increases in state revenues are projected to be realized – the “triggers;” and
- Allowing districts to negotiate a seven day reduction in the instructional/work year (in addition to the five already allowed) if applicable triggers are activated.

Districts should plan now for negotiating under the gun and confronting the AB 114 triggers, including contingency language if the triggers are invoked. We believe, however, districts should consider the following factors before pursuing this option.

1. **Negotiate?** If you have a multiyear contract, does it allow you to open negotiations in 2011-2012? Is there contingent reopener language, e.g., “If funding is reduced...” or “a negative impact on the District’s budget...”? If neither exists, can you convince the union to come back to the table?
2. **Calculate** The first question in negotiations will concern the “trigger effects” on your 2011-2012 budget. Districts should have a thorough understanding of and user friendly presentation illustrating these effects. Districts should calculate whether revenue cuts can be absorbed prudently in 2011-2012 together with a plan for expenditure reductions in 2012-2013. AB 114 applies only to 2011-2012.
3. **Anticipate** The major bargaining issues are foreseeable. You should be able to prepare materials and answers beforehand. What measures have you taken or can you take to address reductions before seeking concessions? What is the board’s deficit-financing philosophy on use of reserves? Can you address this year’s problem by future expenditure reductions in areas such as work days, class size, and layoffs? The district should be prepared to prove immediate action is needed to have any credibility for negotiating concessions in 2011-2012.

4. **Deliberate** Once trigger effects are known, the board and district leadership should discuss whether they need to pursue 2011-2012 concessions, or if efforts should be devoted to exploring negotiations strategies for 2012-2013. If immediate action is needed, districts should develop proposals based on objective criteria and tailored to local economic realities. If not, districts should plan to open negotiations for 2012-13 by mid 2011-12 at the latest.
5. **Communicate** Even if confronting the trigger effects can be delayed until 2012-2013, there should be a communication plan in 2011-2012. Meet with interested stakeholders – unions, unrepresented employees, parent-teacher associations, school site councils - as soon as possible to ensure all interested parties share a common understanding of the trigger effects on the district budget. Schedule a negotiations session in November 2011 to coincide with the Legislative Analyst Office (“LAO”) revenue forecast. Under AB 114, if the LAO forecasts more than \$2 billion above the revenue set forth in the state budget, the trigger will not be invoked, irrespective of the forecast that will later be released by the Department of Finance (“DOF”). If the LAO forecast does not meet this revenue threshold, districts must wait to see if the later DOF forecast does. Therefore, if the LAO forecast “comes up short,” the parties should schedule another negotiations session to coincide with the DOF forecast in December. These triggers are different for community college districts.

## In conclusion....

Dannis Woliver Kelley believes in clear, open, and honest negotiations based on the core values of each district which must be constant in the face of volatile state budgets. Before demanding a return to the bargaining table, districts should analyze the multiyear trigger effects and anticipate the negotiations dialog that will almost certainly occur. In this manner, districts can display their credibility and ability to plan strategically. We believe this sensible approach is preferable to jumping the gun.

With unparalleled experience and expertise, DWK attorneys can devise and implement strategies to confront the triggers and meet the unique needs of each district.

# Stock Market Gyration: What Does It Mean For January Cuts In K-12 Funding?

Submitted by: David Walrath - SSDA Legislative Advocate

During the last two weeks, the Dow Jones Industrial Average has taken a trajectory that is similar to a brick being dropped off a high building. Does the Dow decline reflect slowing California, national and international economies and less state General Fund revenue than anticipated in the adopted 2011-12 State Budget?

Stock markets tend to price-in their anticipation for corporate earnings and economic growth six to twelve months in the future. What the Wall Street stock market appears to be pricing-in are: 1) slower European growth; and 2) the assumption that Congress will not get its act together with a deficit reduction plan that is required in November 2011. As part of the debt ceiling and deficit reduction agreement, Congress first soft-capped federal spending for the next decade to score slightly less than \$1 trillion in savings and targeted additional \$1.5 trillion in savings during the next 10 years from new reductions to be determined by a super committee no later than November 2011. If the super committee and Congress do not act to find \$1.5 trillion in savings, then across-the-board reductions to most programs and targeted reductions to Medicare and Defense automatically would occur.

It is the possible automatic reductions that Wall Street is pricing-in for the Dow and the broader stock market indices which is having a multiplier effect to pricing-in of a European slowdown.

If the super committee is not able to reach agreement and the automatic cuts are triggered, every expectation is that 2012 Gross Domestic Product and economic growth will be one percentage point lower than the current projections.

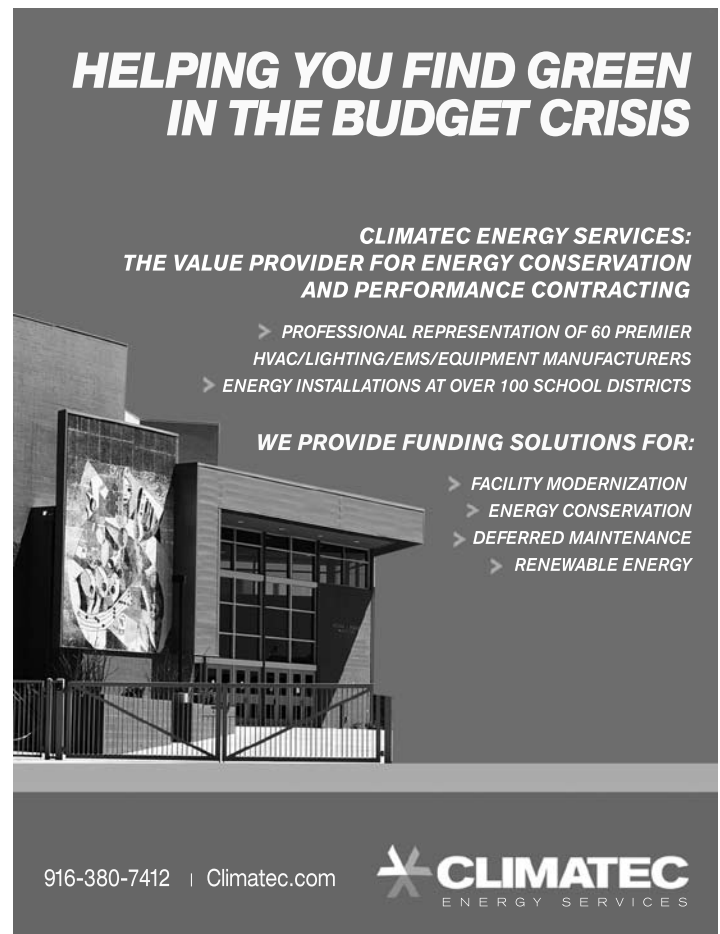
The current projections are already for slow economic growth. A one percentage point reduction would mean lower than expected corporate earnings which are now being reflected in lower corporate share value.

The markets are reacting to a concern with Congress's ability to reach spending, revenue and deficit reduction without going to the cliff and potentially going over the cliff. That concern and how the super committee will act is creating huge uncertainty for investment, hiring and other economic decisions.

If Congress fails to act in a balanced manner and if Wall Street believes there will be reduced economic growth and job creation, then it is highly probable that the California state General Fund revenue estimates will be overly optimistic. However, it is too early to make that projection now.

I believe that Wall Street and Main Street are sending an unambiguous message to Congress to behave like adults, reach compromise with a balanced proposal, cut future spending but no current spending cuts, and increase future revenue. A combination of expenditure reduction and revenues could reduce future (10 and 20 year) deficits by up to \$3 to \$4 trillion. I believe Congress will hear that message and will recognize that their reelection is dependent upon a strengthening economy and they will not jeopardize their reelection by risking slower economic growth.

For this reason, I continue to believe that even after the Controller's report of lower July state General Fund revenues the odds of the K-12 funding cut trigger being pulled are still less than 50/50.



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