SCHOOL LEADERS

Morongo Unified School District

Budget Stabilization Review

Findings and Recommendations

April 24, 2026

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Dear Members of the Board and Superintendent,

On behalf of School Leaders, I am pleased to present the Morongo Unified School District Budget Stabilization Review: Findings and Recommendations.

The decision to commission this review before conditions required reflects a genuine commitment to the long-term wellbeing of the students and communities this District serves. That kind of proactive stewardship is not universal, and it deserves recognition.

This report is best read within a clear understanding of its purpose and scope. It is a review of current conditions — staffing levels, operational systems, fiscal position, and the trajectory those conditions produce if left unaddressed. It is not an evaluation of the people who work within those systems. The conditions documented here have developed over years and across circumstances that no single leadership team could fully control — demographic shifts, economic pressures, state funding dynamics, and broader social and technological forces that fall well outside the scope of any internal review. This report does not seek to explain how those conditions came to be. It assesses what exists today and provides a practical roadmap for what comes next.

This work was conducted with deep respect for the staff of MUSD. In every department reviewed, we encountered professionals who are committed to their work, connected to their community, and genuinely invested in outcomes for students. We are grateful to the Board, the Superintendent, district leadership, and the many staff members across departments and school sites who extended their time, candor, and cooperation throughout this engagement.

Respectfully submitted,

Joe Dixon

Joe Dixon
President, School Leaders

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Executive Summary

Morongo Unified School District serves approximately 7,361 students across 17 sites in eastern San Bernardino County, including the communities of Twentynine Palms, Yucca Valley, Joshua Tree, Morongo Valley, and surrounding unincorporated areas. The District maintains established fiscal structures that meet state compliance requirements and has made investments in instructional programs including Career Technical Education, dual enrollment, STEAM Labs, and a robust special education continuum. Reserves are above state-required minimums and the District holds a positive certification as of the most recent interim report.

This report presents the findings and recommendations of a comprehensive Budget Stabilization Review conducted by School Leaders on behalf of MUSD. The review was initiated in response to the District's ongoing structural deficit spending, driven primarily by declining enrollment coupled with lower than average Average Daily Attendance, rising personnel and benefit costs, and growing unrestricted general fund contributions to restricted programs. Over the past decade, MUSD has experienced a sustained enrollment decline of more than 10 percent, a trend projected to continue through 2029–30. The result is a structural misalignment between the District's operational footprint and its current fiscal reality that will require deliberate corrective action to resolve.

The review encompassed seven functional areas: Human Resources, Technology, Maintenance and Operations, Facilities Optimization, Business Services, Instructional Services, and Special Education. Each area was evaluated through document review, staff interviews, site observations, and benchmarking against comparable California unified school districts. Across all seven areas, a consistent set of themes emerged.

Staffing structures have not kept pace with enrollment decline. Personnel-related expenditures represent approximately 80 percent of unrestricted general fund spending, and staffing ratios, organizational structures, and allocation practices in several departments were developed during periods of higher enrollment and have not been systematically recalibrated. While no single department presents a crisis-level condition, the cumulative effect across all areas is material.

Systems are designed but not consistently executed. The District has established foundational fiscal and operational structures that are sound in design. However, these systems are not functioning as a fully integrated operational model. Inconsistent implementation, informal workarounds, and limited cross-departmental coordination have created gaps between policy and practice that constrain the District's ability to manage proactively. A focus on building organizational coherence between departments and through to the schools is necessary to realize increased efficiencies and program efficacy.

Instructional and student support systems require structural realignment. The Instructional Services Division operates with fragmented role ownership and insufficient dedicated leadership for high-priority functions including MTSS, attendance recovery, and enrollment stabilization. Chronic absenteeism — above the state average — carries direct implications for LCFF revenue. The Special Education program shows indicators of over-identification that contribute to elevated encroachment on the unrestricted general fund.

The recommendations contained in this report are organized by department and structured as phased implementation plans spanning short-term stabilization (0–6 months), mid-term alignment (6–18 months), and long-term sustainability (18+ months). They are intended to support MUSD in aligning staffing, systems, and programs with the District's current enrollment, fiscal capacity, and strategic priorities.

Enrollment stabilization initiatives — including Independent Study expansion, CTE and dual enrollment growth, and engagement of the homeschool population within district boundaries — represent identified pathways to revenue recovery. Strengthening MTSS and attendance systems has the potential to improve both student outcomes and ADA. Tighter position control, integrated fiscal and HR systems, and consistent cross-departmental processes will reduce cost exposure and increase organizational agility. A phased approach to aligning staffing and facilities with current enrollment levels is the primary mechanism for achieving structural balance over the multi-year horizon addressed in this report.

Background and District Context

Morongo Unified School District is a rural unified school district located in eastern San Bernardino County, California, serving the communities of Twentynine Palms, Yucca Valley, Joshua Tree, Morongo Valley, and surrounding unincorporated areas across a geographically dispersed service area. As of 2023–24, MUSD operates 17 school sites, including nine elementary schools, two middle schools, two comprehensive high schools, one continuation school, one charter school, one preschool, and one adult education program. District operations are supported by centralized instructional, business, and human resources functions housed at the District Office.

Enrollment Trends

District enrollment has declined steadily over the past decade, decreasing from approximately 8,200 students in 2014–15 to 7,361 students in 2023–24 — a reduction of more than 10 percent. This decline reflects long-term demographic and regional factors rather than short-term volatility, and projections indicate the trend is expected to continue through 2029–30. Average Daily Attendance has stabilized at approximately 91 percent, though chronic absenteeism — currently at 26.6 percent districtwide — continues to affect the District's effective ADA and, by extension, its LCFF revenue.

Facilities

District facilities were constructed to accommodate substantially higher enrollment levels than currently exist. Districtwide classroom capacity exceeds 14,000 seats, resulting in an estimated utilization rate of approximately 52 percent in 2023–24, with further reductions projected in coming years. The District's geographic configuration — multiple small, isolated campuses spread across a large service area — limits the operational flexibility typically available to districts of comparable enrollment. Decisions regarding site consolidation or reconfiguration must be considered in the context of existing bond commitments, Measure C capital improvement priorities, and long-range facility investment strategies.

Financial Position

The District's 2025–26 First Interim Report reflects total unrestricted general fund revenues of approximately $107.6 million and total unrestricted general fund expenditures of approximately $94.0 million. The projected operating surplus before contributions of approximately $13.6 million is offset by ongoing unrestricted contributions to restricted programs totaling approximately $20.8 million, producing a net decrease in unrestricted fund balance of approximately $6.9 million for the year. The District projects an unrestricted reserve for economic uncertainties of approximately $4.7 million, which meets the state-required minimum but provides limited fiscal flexibility. A budget stabilization reserve of approximately $12.0 million and an ending unrestricted fund balance of approximately $44.7 million are maintained; however, these reserves are being used to backfill a structural deficit, where ongoing expenditures exceed ongoing revenues. Absent corrective action, this imbalance will persist in the out-years, requiring continued reliance on reserves to sustain operations. At the current expenditure trajectory, the District is projected to approach unrecoverable unrestricted fund reserve depletion by FY 2029–30.

Personnel-related expenditures represent the largest share of unrestricted general fund spending, with certificated and classified salaries and benefits totaling approximately $75.9 million — roughly 80 percent of total unrestricted expenditures. Step and column increases are projected at approximately 2 percent for certificated staff and 3.1 percent for classified staff. The District's 2024–25 Unaudited Actuals reflect a total general fund net decrease of approximately $9.6 million, driven by expenditure levels exceeding sustainable revenue growth and increased contributions to restricted programs. Long-term obligations and benefit costs continue to grow.

Scope of the Review

At the request of district leadership, School Leaders conducted a Budget Stabilization Review encompassing seven functional areas: Human Resources, Technology, Maintenance and Operations, Business Services, Facilities Optimization, Instructional Services, and Special Education. The review was designed to evaluate staffing efficiency, organizational structure, fiscal systems, and operational practices across each area, with the objective of developing data-driven recommendations aligned with enrollment trends and deficit-reduction goals. Fieldwork was conducted between October 2025 and April 2026 and included document review, department interviews, site observations, and benchmarking against comparable California unified school districts. Findings and recommendations are presented by department in the sections that follow.

Department Reviews

Human Resources Review

Executive Summary

Morongo Unified School District's Human Resources Department is responsible for the full personnel lifecycle across a geographically large, rural district — recruitment, onboarding, credential monitoring, leaves, evaluations, labor relations, and benefits administration — serving certificated and classified employees across 17 school sites. As personnel-related expenditures represent approximately 80 percent of the District's unrestricted general fund spending, the efficiency and effectiveness of human resources operations have a direct bearing on the District's overall fiscal condition.

The review found that the Human Resources Department is transitioning from post-pandemic operational instability toward a more stable structure. Staff turnover has declined, core functions are increasingly manageable, and there is evidence of improved budget accuracy and fiscal scrutiny of new positions. However, the department continues to operate in a largely reactive mode, relying on institutional knowledge and informal coordination rather than standardized, system-driven processes. Position control — the most critical fiscal safeguard in a personnel-intensive organization — functions at a developing level and is not yet fully institutionalized.

Districtwide non-instructional staffing density, at approximately 20.7 students per non-instructional FTE, falls within the calibrated normative range for similarly sized California unified districts. Central office staffing density, at approximately 86.51 students per central office FTE, is similarly aligned with peer patterns. The deeper functional analysis confirms that custodial, maintenance, and Human Resources functions are not the primary structural contributors to districtwide staffing density. Density is instead driven by site-based classified allocations, food service staffing configurations, and minimum staffing thresholds required to sustain operations across a geographically dispersed multi-campus system.

Enrollment-driven staffing projections identify a net reduction need at the elementary and high school levels, partially offset by modest growth at the middle school level. The recommendations and implementation plan that follow are designed to advance the District's position control maturity, strengthen HR–Fiscal coordination, and build the workforce planning infrastructure necessary for long-term fiscal sustainability.

Background and Scope

The Human Resources Staffing Efficiency and Organizational Review was conducted using a structured, data-driven approach consistent with best practices used in comparable district operational reviews. The study relied on quantitative data analysis, document review, interviews with district leadership and staff, and benchmarking against comparable California school districts. Data sources included district staffing records, enrollment and demographic reports, compensation and benefits information, workflow documentation, and publicly available comparative data.

Fieldwork was conducted over a defined study period and focused on evaluating current staffing levels, allocation practices, organizational structure, and human resources processes in relation to enrollment trends, operational demand, and fiscal capacity. Information obtained through interviews was used to supplement document review and to better understand operational context; however, findings and recommendations were based on verifiable data and observed practices rather than individual opinions.

The report presents findings and recommendations intended to assist the District in improving efficiency, strengthening organizational alignment, and supporting long-term fiscal sustainability. Recommendations are not intended to prescribe specific personnel actions but are designed to provide district leadership and the Board of Education with information and options to support informed decision-making. Fiscal impact estimates are provided where feasible; however, actual savings may vary depending on implementation timing, negotiations, and final district actions.

Study Team

The study team included Jason Hasty, Ed.D., School Leaders Advisor, who was responsible for conducting the analysis, facilitating interviews, reviewing district documentation, and developing findings and recommendations. District leadership and staff supported the review by providing data, documentation, and access to personnel across departments, including Human Resources, Business Services, and Instructional Leadership. Their cooperation and responsiveness contributed significantly to the completion of the study.

Key Findings

The review identified four interrelated findings that collectively influence MUSD's fiscal condition, staffing efficiency, and human resources operations.

- **Enrollment-Driven Fiscal Pressure**: Sustained declines in student enrollment continue to exert significant pressure on the District's financial position. While enrollment has decreased steadily over multiple years, staffing levels, facilities capacity, and programmatic offerings have not adjusted at the same pace, resulting in higher per-pupil costs and increasing reliance on ongoing general fund resources. Personnel-related expenditures remain the largest component of district spending, underscoring the importance of aligning staffing and organizational structures with current and projected enrollment levels.

- **Staffing Alignment Challenges**: The District's geographically dispersed service area and prevalence of small schools create inherent challenges in achieving staffing efficiency. At the secondary level, minimum course offerings, specialized programs, and credentialed staffing requirements limit the District's ability to fully scale staffing reductions in response to enrollment declines. As a result, student-to-staff ratios vary across grade spans and sites, with some schools operating at ratios that exceed peer district norms. While elementary staffing more closely aligns with established planning targets, variation across sites suggests opportunities to improve consistency, equity, and transparency in allocation practices.
- **Human Resources Systems and Workflow Maturity:** Human Resources operations are transitioning from post-pandemic instability toward greater organizational stability and capacity. Staff turnover has moderated and core functions are increasingly manageable; however, the department continues to operate in a largely reactive mode. The need for more fully documented standard operating procedures, coupled with evolving system implementations and training demands, constrains the department's ability to focus on long-term planning, analytics, and proactive service delivery. Continued investment in workflow standardization, system integration, and staff development will be critical to advancing operational maturity.
- **Absence Management and Substitute Cost Drivers:** Employee absences and substitute utilization are significant operational and fiscal considerations for the District. Data reviewed indicate that absence rates, particularly when aggregated across a large part-time workforce, contribute to elevated substitute costs and administrative workload. While attendance patterns vary by employee group and site, the lack of consistent monitoring tools and clearly defined accountability structures limits the District's ability to proactively manage absence trends. Strengthening absence management practices presents an opportunity to reduce costs, improve instructional continuity, and lessen administrative strain on school sites and central office staff.

Analysis

Staffing Ratio and Allocation Analysis

The staffing summary presented in this section is based on data extracted from the EPICS Employee Position Report dated December 8, 2025, which serves as the District's official position control and staffing record. The EPICS report includes detailed information for each active employee and position, including assignment, department, location, employee classification, full-time equivalent (FTE), funding distribution, and management designation. Vacant positions were excluded from this analysis to ensure the summary reflects only currently filled positions. At the time of this report, vacant positions totaled 234, representing 14.7 percent of all unfilled and filled existing positions (1,595).

For purposes of this review, employees were grouped and summarized by department and location, with counts reflecting unique individuals regardless of assignment percentage. Employees were categorized as full-time or part-time based on their assigned Employee FTE, and classified as certificated or classified using classification and bargaining-unit information contained in the report. Management positions were identified separately using the EPICS management designation to highlight supervisory and leadership roles within each department.

Employee Summary by Department and Location

Key columns explained:

- **Total Emp** = unique employees
- **FT** / **PT** = Full-Time inclusive of 6+ hrs requiring benefits/ Part-Time employees: less than 6 hours per day
- **Cert** = Certificated
- **Class** = Classified
- **Mgmt** = Management positions inclusive of classified and certificated management

The Business Services Division staffing table reflects an operationally focused workforce that is predominantly classified. Within this division, Nutrition Services accounts for the largest share of staffing and represents the majority of part-time positions, reflecting the service-driven and schedule-dependent nature of food service operations. Other Business Services functions, including Maintenance, Grounds, Information Technology, and Accounting, are largely staffed with full-time classified employees and include a concentrated number of supervisory and management roles necessary to support districtwide operations.

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Business Services Division							
Department	**Location**	**Total Emp**	**FT (benefits)**	**PT (no benefits)**	**Cert**	**Class**	**Mgmt**
Accounting	District Office	12	12	0	0	12	1
Purchasing	District Office	2	2	0	0	2	1
Nutrition Services	Districtwide	76	45	31	0	76	3
Maintenance	Districtwide	19	19	0	0	19	2
Grounds	Districtwide	8	8	0	0	8	0
Information Technology	Districtwide	20	19	1	0	20	3
Warehouse	Districtwide	3	3	0	0	3	0
Risk / Transportation	Districtwide	3	3	0	0	2	2
Total		**143**	**111**	**32**	**0**	**142**	**12**

The Educational Services/School Site staffing tables represent the largest portion of the District's workforce and are primarily instructional in nature. Certificated employees are concentrated in classroom teaching and school administration roles, while classified staff are heavily represented in Special Education and site-based support positions. The distribution of staffing across sites reflects the District's small-school configurations and programmatic requirements, particularly in Special Education, where staffing is driven by service mandates rather than enrollment alone.

Educational Services/School Sites							
Department	**Location**	**Total Emp**	**FT**	**PT**	**Cert**	**Class**	**Mgmt**
Elementary Sites	School Sites	408	286	84	169	215	11
Secondary Sites	School Sites	292	244	58	191	122	10
Other Site-Based	School Sites	8	8	0	0	0	8
Total		**708**	**538**	**142**	**360**	**337**	**29**

Educational Services							
Department	**Location**	**Total Emp**	**FT**	**PT**	**Cert**	**Class**	**Mgmt**
Ed Services	District Office	19	19	0	7	1	7
Special Education	District Office	6	6	0	3	3	3
Total		**25**	**25**	**0**	**10**	**4**	**10**

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Human Resources							
Department	Location	Total Emp	FT	PT	Cert	Class	Mgmt
Human Resources	District Office	10	9	1	2	8	6

Superintendent's Office							
Department	Location	Total Emp	FT	PT	Cert	Class	Mgmt
Superintendent[1]	District Office	2	2	0	0	2	2

The District employs 86 filled management positions, comprising 54 certificated and 32 classified positions. Certificated management roles are concentrated in instructional leadership and program oversight, including principals, assistant principals, assistant superintendents, and instructional directors. Principal positions are distributed across elementary, middle, and high school sites, as well as alternative education sites, while classified management positions are concentrated in the district office and operational departments.

Districtwide Management								
Management Position	Cert. Mgmt	Class. Mgmt	District Office	Elementary	Middle School	High School	Alt. / Cont.	Total Positions
Asst. Supt.	3	1	4	—	—	—	—	4
Director	5	6	11	—	—	—	—	11
Supervisor	0	2	2	—	—	—	—	4
Principal	18	0	—	9	2	2	1	18
Asst. Principal	5	0	—	2	1	2	—	4
Program/ Specialized Management	2	0	2	—	—	—	—	2
Total	**33**	**9**	**19**	**11**	**3**	**4**	**1**	**43**

Based on district-provided enrollment staffing projection documentation, several enrollment-driven staffing adjustments were identified across grade spans. At the elementary level, projected enrollment declined by approximately 375 students, resulting in an identified need to reduce staffing by approximately 14.0 full-time equivalent positions to remain aligned with the District's staffing formulas. At the middle school level, enrollment projections indicate modest growth, requiring approximately 6.0

[1]Per labor data, the PIO is assigned under HR (PERS) and is **counted in the HR staffing table** above; however, the position functions out of the Superintendent's Office.

additional full-time equivalent positions to meet instructional program requirements and class-size expectations. At the high school level, projected enrollment declined by approximately 120 students, resulting in an identified need to reduce staffing by approximately 9.0 full-time equivalent positions.

Taken together, the enrollment staffing projections indicate a net reduction in certificated staffing at the elementary and high school levels, partially offset by targeted increases at the middle school level. These projections provide a quantitative foundation for identifying staffing inefficiencies and developing a targeted staffing reduction plan aligned with enrollment trends and deficit-reduction goals.

Human Resources Division Operational Review

Human resources functions are central to the daily operations of MUSD and impact every level of the organization. The Human Resources Department is responsible for coordinating a wide range of personnel services, including recruitment, selection, hiring, onboarding, credential monitoring, leaves, evaluations, labor relations support, and benefits administration. These functions support certificated and classified employees across a geographically large, rural district with multiple small school sites and diverse program offerings.

MUSD relies on its Human Resources Department to ensure staffing decisions align with enrollment trends, contractual requirements, and fiscal constraints while maintaining compliance with collective bargaining agreements and applicable labor laws. As personnel-related expenditures represent the largest portion of the District's general fund budget, the effectiveness and efficiency of human resources operations play a significant role in the District's overall financial health.

Information obtained through interviews and document review indicates that the Human Resources Department is transitioning from a period of operational instability following the COVID-19 pandemic toward a more stable and sustainable structure. Staff turnover has declined significantly, allowing the department to shift focus from reactive staffing needs to rebuilding core systems, improving workflows, and establishing consistent standard operating procedures. This transition has created an opportunity to evaluate existing practices and address long-standing structural and process-related inefficiencies.

The department currently manages a high workload driven by the need to modernize technology, standardize processes, and improve coordination with Business Services and instructional leadership. Key operational challenges identified through interviews include implementing and training on new and existing processes, continuing to strengthen position-control workflows, and addressing districtwide absence-management trends that affect staffing stability and substitute costs. While several improvements have already been implemented, sustained progress will depend on clearly defined procedures, role clarity, and improved alignment between job functions and district needs.

An effective Human Resources Department in MUSD must balance compliance, service delivery, and fiscal stewardship while operating within the constraints of declining enrollment, small school environments, and increasing regulatory requirements. This review evaluates whether current HR operational processes and organizational structures are positioned to support those demands and identifies opportunities to improve efficiency, reduce redundancy, and strengthen the District's capacity to manage its workforce in a fiscally responsible manner.

Human Resources Organizational Structure

The Human Resources Department is organized under the leadership of the Assistant Superintendent of Human Resources, who provides overall direction and oversight for both certificated and classified human resources functions. This role is responsible for districtwide labor relations, negotiations, grievance processing, legal compliance, training and coaching planning, staffing allocations, and position control, ensuring alignment between personnel practices and district operational needs.

Reporting directly to the Assistant Superintendent is the Director of Human Resources, who oversees the day-to-day operational management of the department. The Director is responsible for hiring and recruitment, managing vacancies, managing substitute and frontline operations, providing labor relations support, coordinating workers' compensation, providing accommodations, and implementing new projects and systems.

The department is functionally divided into certificated and classified support teams, each with dedicated staff responsible for specialized personnel services.

On the certificated side, support includes administrative assistance, analyst, and technician roles that collectively manage certificated recruitment and onboarding, credential monitoring, assignments, evaluations, professional growth, tenure tracking, leaves, and personnel records. These positions also support board agenda items related to certificated personnel, coordinate new teacher orientation, and ensure compliance with credentialing and contractual requirements. In addition, the department includes a

Resident Program Facilitator who supports teacher induction, mentoring, and professional development initiatives.

On the classified side, administrative, analyst, and technician positions support classified recruitment and hiring processes, eligibility lists, job descriptions, onboarding, testing, evaluations, leaves, and contract administration. These roles also manage EPICS data entry, employee verification, substitute onboarding, and compliance requirements, including TB, CPR, and licensure. Front-facing functions, including reception and substitute management, are supported through receptionist and switchboard roles, one of which is currently vacant.

Overall, the Human Resources Department operates with a centralized structure that provides comprehensive personnel services across the district, with staff organized by employee group specialization. While responsibilities are clearly delineated, the structure reflects a department that manages a broad scope of work, ranging from strategic labor relations and staffing allocation to detailed transactional and compliance-driven processes.

HR–Business Office Coordination

The Human Resources Department and the Business Office together form the operational backbone of a school district. Nearly every fiscal decision made by a district ultimately traces back to staffing — hiring, compensation, benefits, leaves, substitutes, separations, and workforce allocation. Because personnel expenditures account for the largest share of a district's general fund budget, effective coordination between Human Resources and Fiscal Services is foundational to financial stability, compliance, and organizational performance.

In a district experiencing enrollment decline and fiscal pressure, the relationship between these two departments becomes particularly critical. Human Resources manages the workforce lifecycle — recruitment, onboarding, credentialing, evaluations, leave management, and labor compliance — while the Business Office ensures that each staffing action is financially sustainable, properly coded, authorized within budget, and aligned with long-term fiscal planning. Neither function can operate effectively in isolation. Staffing decisions made without fiscal validation create structural imbalance; fiscal controls imposed without operational understanding disrupt service delivery and compliance.

Effective coordination requires shared visibility into position control, real-time communication regarding vacancies and hires, consistent workflow discipline, and joint ownership of staffing outcomes. This ensures that employees are onboarded timely, separations are processed accurately, leaves are tracked, grant-funded positions are properly managed, and budget projections reflect operational reality. It also protects the District's compliance with labor law, collective bargaining agreements, credentialing requirements, and state fiscal statutes.

The interviews conducted with Human Resources office staff and fiscal leadership were designed to understand how daily operational practices align with formal position control systems, staffing decisions, fiscal oversight, and cross-department coordination. Interviews focused on workflow, staffing allocation, communication channels, onboarding and separation processes, leave tracking, recruitment practices, and the operational relationship between Human Resources and the Business Office.

Overall, the interviews revealed a department managing a high volume of transactional work while attempting to maintain compliance and responsiveness, but without fully standardized cross-department structures to support consistent coordination. Staff demonstrated strong institutional knowledge and a commitment to operational continuity. However, the absence of formalized, standing collaboration structures between Human Resources and the Business Office creates risk in position control, budget alignment, and workflow clarity.

Areas of Strength

1. **Awareness of Fiscal Constraints and Staffing Pressure:** There is clear awareness among leadership that enrollment decline requires tighter scrutiny of staffing. Conversations about new positions are occurring, and there is informal scrutiny before positions are created. The Business Office is actively monitoring staffing ratios and budget alignment, and there is evidence of greater budgeting accuracy compared to prior years.
2. **Existence of a Position Authorization Process:** A formal routing structure exists for position approvals involving instructional leadership, special education, and fiscal oversight. New positions ultimately go to the board with job descriptions attached, indicating that a governance framework exists to prevent uncontrolled staffing expansion.
3. **Active Cross-Department Conversations:** Although not institutionalized, there are periodic staffing discussions involving Special Education, HR, and Fiscal. These conversations demonstrate recognition that staffing must be reconciled against enrollment and funding, especially in Special Education.

4. **Reduced Reliance on Budgeting Cushions:** The Business Office reports improvement in budget accuracy and a shift away from holding excessive placeholder funding for vacant positions, suggesting strengthening fiscal discipline and more realistic forecasting practices.

Growth Opportunities

1. **Lack of Standing Interdepartmental Structure:** HR and Fiscal do not operate under a regular standing meeting cadence dedicated to position control and staffing reconciliation. Conversations occur episodically rather than through a structured governance system. Without recurring meetings, workflow depends heavily on individual follow-up rather than system reliability. There is no formal venue where the departments consistently review new hires and funding source alignment, effective separation dates, leave-of-absence tracking, vacancy status, substitute usage, position control reconciliation, or workflow improvement opportunities. This increases the risk of misalignment between staffing records and fiscal reality.
2. **Position Control Execution Gaps:** While a formal routing process exists, interviews indicate inconsistent adherence to it. HR may process hires or staffing changes before position records are fully reconciled in the fiscal system. In some cases, staffing appears to be entered without complete backend position validation, potentially resulting in budgeted positions that do not reflect actual need or funding. The system is structurally present but operationally fragile.
3. **Limited Shared Understanding of Backend Processes:** Fiscal leadership expressed concern that HR staff do not always understand the downstream fiscal implications of staffing actions. Conversely, HR staff are under high transactional pressure and may lack visibility into fiscal constraints or long-term staffing projections. This gap is not due to unwillingness but to a lack of structured shared training and communication.
4. **Absence Management Integration:** Leave tracking and vacancy coverage appear to be handled operationally but not systematically integrated into position control reviews. Given the District's heavy substitute and Special Education staffing demands, absence management is a key cost driver that would benefit from tighter HR–Fiscal alignment.
5. **Workflow Documentation and Process Transparency:** There is no clear shared workflow map defining responsibilities between departments. Tasks such as onboarding, separations, grant-funded staffing, and temporary placements rely heavily on informal knowledge. This increases risk during turnover and limits scalability.

Overall Effectiveness Assessment

The relationship between the Human Resources Department and the Business Office is functional but not fully systematized. Both departments are working toward the same goals — fiscal sustainability and appropriate staffing — but are doing so through informal coordination rather than a formal governance framework. The system operates because of individual effort and communication, not because the structure guarantees alignment.

Analyst Desk Study Interviews

As part of the review, structured desk-study interviews were conducted with Human Resources office staff to evaluate role alignment, workflow efficiency, and capacity relative to current district needs. The interviews followed a consistent framework focused on six areas: core responsibilities and time allocation; alignment with job descriptions; division of labor among staff; workflow and system efficiency; compliance and risk exposure; and overall staffing capacity and reorganization.

Information obtained from the interviews indicates that the Human Resources office operates in a high-volume, deadline-driven environment, with significant emphasis on onboarding, recruitment, compliance tracking, and employee support. Both analysts described workloads heavily concentrated in hiring and onboarding processes, data tracking, and employee inquiries, with large portions of the workday consumed by time-sensitive tasks tied to legal compliance, credentialing, mandated training, and background clearances.

The interviews also highlight that the division of labor between classified and certificated responsibilities is clearly defined, with minimal functional overlap. However, reliance on specialized institutional knowledge in the workflow remains high. Several critical processes depend on individual expertise rather than fully documented procedures, creating vulnerability if positions are vacant or staff are absent.

Both staff members identified hiring workflows, position changes, and interdepartmental coordination with payroll and benefits as key bottleneck areas. Delays often stem from routing inefficiencies, documentation flow, and centralized knowledge dependencies. Staff emphasized that human judgment remains essential in areas such as testing, credentialing, onboarding clearance, and leave management, limiting the degree to which automation alone can resolve workload pressures.

From a capacity standpoint, the interviews suggest the department is operating at or near its operational limits. Compliance requirements added by state and federal agencies have expanded workload without proportional staffing increases. The interviews implicitly indicate that workload is highly sensitive to staffing levels and process design, and that efficiency improvements would require workflow restructuring rather than simply redistributing tasks.

Overall, the interviews reveal a department that has stabilized following prior turnover but is still transitioning toward formalized systems, standardized procedures, and scalable workflows. Future efficiency gains will depend less on individual performance and more on organizational structure, workflow design, and process integration across departments.

Operational Standardization and Workflow Clarity

Interviews and document review indicate that many HR processes rely on institutional knowledge rather than fully documented, standardized procedures. While improvements have been made post-COVID, the department continues to balance daily operational demands with the need to formalize workflows, update standard operating procedures, and consistently apply processes across sites and departments. This creates variability in execution, increases reliance on individual staff expertise, and limits scalability as workloads fluctuate.

Position Control

Position control is a foundational fiscal safeguard. Because personnel costs represent the largest portion of the District's general fund expenditures, the strength of the position control system directly affects budget stability, enrollment alignment, audit defensibility, and long-term sustainability. A fully functioning position control structure ensures that staffing decisions are authorized, funded, documented, reconciled, and continuously monitored within a consistent governance framework.

Position Control System Maturity Assessment

The position control maturity framework below was developed through a structured synthesis of four primary evidence streams: FCMAT fiscal oversight doctrine, School Services of California fiscal planning guidance, CASBO operational best practices, and empirical staffing data from comparable California K–12 districts calibrated to districts similar in size, structure, and geographic context to MUSD as a rural, geographically dispersed unified district.

A formal position-authorization framework exists in MUSD, and there is evidence of fiscal scrutiny of new staffing actions. Budget accuracy has improved compared to prior years, and leadership discussions occur before most new positions are created. Routing processes are in place, and new positions ultimately require board approval with job descriptions attached.

However, the system's execution is not yet fully standardized or consistently enforced. Interviews indicate that position control processes are sometimes followed informally rather than institutionally. Staffing changes may occur before backend fiscal reconciliation is complete, and cross-department communication relies more on individual initiative than on a guaranteed governance structure. There is no standing HR–Fiscal staffing reconciliation meeting, and workflow documentation is incomplete. Leave tracking, vacancy alignment, and grant-funded staffing decisions are not consistently integrated into a unified staffing dashboard.

As a result, the District's position control system functions, but remains dependent on institutional knowledge and personal communication rather than a hardened process architecture. This creates operational risk during turnover, increases the likelihood of budget drift, and limits the District's ability to proactively plan staffing adjustments in response to enrollment decline.

The maturity levels outlined below are not evaluative judgments but developmental stages reflecting increasing degrees of institutionalization, automation, and integration between Human Resources and Fiscal Services.

Based on interviews, document review, and observed workflow practices, MUSD currently operates at Level 2 — Developing / Controlled.

Level	Description	Key Characteristics	Risk Level
Level 1	**Reactive / Informal**	• No consistent approval structure • Staffing changes may occur before fiscal validation • Manual tracking • Heavy reliance on individuals	High
Level 2	**Developing / Controlled**	• Formal position authorization exists • Fiscal review occurs before most new positions • Board approval required • Processes followed but not consistently enforced • Limited dashboards or automation • No standing HR–Fiscal reconciliation cadence	Moderate

Level	Description	Key Characteristics	Risk Level
Level 3	**Structured / Integrated**	• Monthly HR–Fiscal reconciliation meeting • Standardized workflows consistently applied • Unified staffing dashboard (authorized vs. filled FTE) • Vacancy and leave tracking integrated • Grant-funded positions reconciled regularly	Controlled
Level 4	**Strategic / Predictive**	• Staffing aligned to multi-year fiscal plan • Enrollment-triggered guardrails adopted • Real-time FTE visibility by funding source • Vacancy replacement tied to fiscal indicators	Low
Level 5	**Optimized / Embedded Governance**	• Position control embedded in policy • Automated HR–Payroll–Budget integration • Routine board reporting on staffing alignment • Continuous improvement cycle	Minimal

The District demonstrates: a formal process exists; fiscal oversight is present; leadership scrutinizes new positions; and budget accuracy has improved. However, the District still shows inconsistent process discipline, limited shared dashboards, no standing HR–Fiscal reconciliation cadence, continued reliance on institutional knowledge, and partial workflow documentation.

Advancing Position Control Governance

To progress from **Level 2: Developing / Controlled** to **Level 3: Structured / Integrated**, the District must institutionalize position control rather than rely on informal coordination. This requires the following structural practices:

- Establish a standing monthly HR–Fiscal reconciliation meeting with a standardized agenda that reviews authorized vs. filled FTE, vacancies, separations and retirements, leaves of absence, substitute utilization, and grant-funded or restricted positions.
- Implement a unified staffing dashboard that reconciles in real time payroll expenditures, budgeted FTE, position control records, and funding sources (LCFF, grants, categorical funds).
- Adopt a formal vacancy replacement protocol tied to enrollment and fiscal triggers, including enrollment-based staffing guardrails, budget capacity review

prior to recruitment, and cabinet-level oversight for new, expanded, or restructured positions.
- Standardize workflow documentation for position control processes and embed routing protocols within the District's approval systems to reduce reliance on institutional knowledge.
- Conduct quarterly reconciliation of grant-funded or one-time funded positions, including funding expiration timelines, sustainability analysis, and identification of positions requiring absorption into the general fund or phased reduction.

These steps shift position control from a functional administrative process to an integrated governance structure, enabling the District to proactively prevent staffing misalignment rather than correcting issues after they occur.

Structural Deficit and Enrollment Decline

Even with higher per-pupil funding through LCFF, overall revenue declines when enrollment declines. If staffing levels are not adjusted proportionally, structural deficits emerge. In MUSD's case, declining ADA combined with comparatively low ADA/FTE ratios suggests that staffing adjustments may not be keeping pace with enrollment shifts. This dynamic increases pressure on the unrestricted general fund and limits the District's ability to absorb rising costs such as textbook adoption, special education contributions, and negotiated salary increases.

The District may consider adopting a formal structural balance policy requiring that ongoing commitments be matched by ongoing revenue or permanent expenditure reductions. Across California, many school districts have adopted such policies to ensure that budgets remain stable over time — requiring that ongoing expenditures, particularly staffing commitments, be supported by ongoing revenues, while one-time revenues are reserved for one-time purposes. Several districts have embedded this concept directly into board policy, including Oakland Unified, Huntington Beach City, San Diego Unified, Irvine Unified, and Santa Ynez Valley Union High School District. These reserve policies complement structural balance policies by providing a measurable benchmark for fiscal health.

Non-Instructional Staffing Density Review

To assess MUSD's operational staffing model, a comparative review of non-instructional staffing density across similarly sized California unified school districts (approximately 6,500–8,500 students) was conducted. This review was informed by California SACS Form 01 public filings, FCMAT fiscal risk indicators and district review reports, School

Services of California publications, CASBO fiscal calibration workshops, publicly available district budget adoption and interim reports, and comparative staffing analyses conducted across unified districts experiencing enrollment decline.

California does not publish a statutory or regulatory benchmark defining optimal non-instructional staffing levels. The analysis therefore focused on students per non-instructional FTE, students per classified FTE, students per management FTE, alignment of staffing trends with enrollment trends, and structural minimum staffing requirements for small or rural campuses.

For purposes of this review, non-instructional staffing includes classified site support, custodial and maintenance, food services, transportation, technology support, business services and fiscal operations, human resources and personnel, and district administration and management. Instructional staffing was excluded to isolate operational load.

Calibrated Non-Instructional Density Scale

Students per Non-Instructional FTE	Density Classification	Interpretation
Below 17	Structurally Dense	Staffing concentration materially above peer norms. Often associated with minimum site staffing thresholds, legacy allocations, program layering, or delayed adjustment to enrollment decline. Requires structural review rather than immediate efficiency conclusions.
17 – 20	Moderately Dense	Above typical peer convergence range. May reflect elevated classified support ratios, decentralized service delivery models, or geographic operating complexity. Targeted functional review may be warranted.
20 – 23	Calibrated / Normative	Aligns with observed peer convergence for unified districts of similar size. Generally supports operational stability while maintaining fiscal alignment, assuming staffing trends track enrollment patterns.

Students per Non-Instructional FTE	Density Classification	Interpretation
23 – 26	Lean	Indicates streamlined operational structure relative to enrollment. Sustainability depends on strong management systems, standardized workflows, and centralized service coordination.
Above 26	Highly Lean	May indicate constrained operational capacity. Potential exposure to service delivery strain, compliance workload pressure, or facility maintenance deferral if not supported by highly efficient systems.

Based on the calibrated peer comparison framework, a reasonable operational range for districts of this size generally falls between 20–23 students per non-instructional FTE.

Non-Instructional Staffing Density Results

District Data

Metric	Value
Total Enrollment (2025-26 Projection)	7,148
Non-Instructional Unduplicated Staff	428
Total Non-Instructional FTEs	352
Number of Non-Instructional Staff working 30 hours or less	111
Number of Non-Instructional Staff total FTE	352.78
Students per Non-Instructional FTE (enrollment divided by Total FTEs)	**20.7**

MUSD's non-instructional staffing density was calculated at 20.7 students per non-instructional FTE, placing the District within the calibrated normative range. This ratio represents a districtwide aggregate indicator and does not, by itself, identify overstaffing or understaffing within any specific department, function, or school site.

Functional Distribution of Non-Instructional FTE by Department

Department	FTE
SITE (school-based support)	163.63
FOOD	54.62
CUST (Custodial)	47.71

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Department	FTE
EDUC (non-instructional education support)	47.97
SPED (classified SPED support)	23.75
MAIN (Maintenance)	19
ITEC (Technology)	19
OTHR	6
ACCT	9.75
PERS (HR)	10.25
GRND	8
BUSS	5
TRAN	1
WHSE	3
SUPT	2
PURC	2
PUBL	2
RISK	1
Total Non-Instructional Staff FTE	**352.52**

Central office departments (Accounting, HR, Superintendent, Purchasing, Risk, Business Services) represent a comparatively modest portion of the total. This suggests that the district's operational density is not the result of administrative layering, but rather site-level service delivery and support allocations.

Central Office Staffing Density Calibration

Students per Central Office FTE	Density Classification	Interpretation
Below 70	Administratively Dense	Central office staffing concentration materially above typical peer patterns. May reflect legacy structures, decentralized service models, or expanded compliance/program administration. Structural review recommended.
70 – 85	Moderately Dense	Above peer convergence range but commonly observed in rural or geographically dispersed districts. May reflect limited economies of scale or expanded site support responsibilities.

Students per Central Office FTE	Density Classification	Interpretation
85 – 100	Calibrated / Normative	Aligns with typical observed staffing patterns for unified districts in this enrollment band. Generally reflects balanced administrative capacity relative to operational complexity.
100 – 115	Lean	Streamlined administrative structure. Sustainability depends on strong management systems, centralized workflows, and technological efficiency.
Above 115	Highly Lean	Potential exposure to administrative workload strain, compliance risk, or delayed service delivery if operational demands exceed staffing capacity.

MUSD's central office staffing density was calculated at approximately 86.51 students per central office FTE, placing the District within the normative or calibrated administrative range.

Additional Review: Custodial, Routine Restricted Maintenance, and Human Resources Staffing

A deeper analysis was conducted of custodial and Routine Restricted Maintenance (Resource 8150) staffing and Human Resources staffing to ensure districtwide density findings were not overly generalized. Industry practice evaluates Maintenance and Operations staffing primarily based on facility square footage, acreage, and service level expectations rather than enrollment alone.

Maintenance & Operations Benchmark Standards

Staffing Area	Operational Benchmark	Primary Measurement Basis
Custodial	~20,000 square feet per custodian	Facility square footage
Maintenance	~1 maintenance worker per 100,000 square feet	Facility square footage
Grounds	~1 grounds worker per 25 acres (district-calibrated benchmark based on operational conditions)	Site acreage

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Custodial Staffing

Metric	Value
Custodial FTE	47.71
District Enrollment (Second Interim)	7,304
Students per Custodian	153

Maintenance and Grounds Staffing (Resource 8150)

Metric	Value
Maintenance (MAIN) FTE	21.00
Grounds (GRND) FTE	8.00
Total Maintenance & Grounds FTE	29.00
District Enrollment (Second Interim)	7,304
Students per Maintenance/Grounds FTE	252

Findings from the deeper review indicate:

- Custodial staffing levels are generally near operational benchmarks, though distribution across sites varies and may require redeployment rather than broad reductions.
- Maintenance trade staffing appears above square-footage benchmarks, suggesting potential efficiency opportunities through attrition management, preventive maintenance planning, and selective use of contracted specialty services.
- Grounds staffing levels are lean relative to acreage and should be maintained to preserve service standards.
- The District's geographic dispersion and multi-site configuration necessitate minimum staffing thresholds to maintain safe, functional facilities.

HR Staffing

Metric	Value
HR FTE	10.25
Total Employees (Unique Individuals)	1,102
Total Filled FTE	941.73
Employees per HR FTE	107.51
HR Staffing Ratio	1 HR FTE per 107.51 employees

Peer-Calibrated HR Benchmarks

Employees per HR FTE	Interpretation
<110	Higher relative HR staffing level
110–150	Typical operational range
150–200	Lean staffing model
>200	Elevated risk to compliance, service levels, and responsiveness

MUSD at 107.51 employees per HR FTE falls within the higher relative HR staffing range. HR staffing levels are reasonable, the ratio does not indicate excess staffing, and given the compliance-heavy regulatory environment in California, this ratio is defensible. Reductions in HR could increase risk in areas including investigations, credential compliance, employee discipline, leaves administration, and collective bargaining support.

Districtwide Non-Instructional Staffing Density — Summary

The comprehensive review confirms that districtwide non-instructional staffing density is not attributable to central office layering, custodial staffing, maintenance funded through Resource 8150, or Human Resources functions. Overall density reflects structural characteristics associated with site-based classified allocations, food service staffing configurations, and minimum staffing thresholds necessary to support multiple campuses across a geographically dispersed system. Core operational support functions examined in this review are generally aligned with workload expectations and service delivery requirements and are not disproportionate drivers of the District's overall staffing density profile.

Recommendations

1. Establish a standing monthly HR–Fiscal position control reconciliation meeting with a standardized agenda covering authorized vs. filled FTE, vacancies, separations, leaves of absence, substitute utilization, and grant-funded positions.
2. Implement a unified staffing dashboard providing real-time reconciliation of payroll expenditures, budgeted FTE, position control records, and funding sources.
3. Adopt a formal vacancy replacement protocol tied to enrollment and fiscal triggers, including enrollment-based staffing guardrails and cabinet-level oversight for new or restructured positions.
4. Standardize and fully document position control workflows, embedding routing protocols within the District's approval systems to reduce reliance on institutional knowledge.

5. Conduct quarterly reconciliation of grant-funded and one-time funded positions, including funding expiration timelines and sustainability analysis.
6. Develop and implement fully documented standard operating procedures for all core HR functions, including onboarding, separations, leave management, and credentialing compliance.
7. Initiate targeted staffing reductions at the elementary level (approximately 14.0 FTE) and high school level (approximately 9.0 FTE) in alignment with enrollment projections, while adding approximately 6.0 FTE at the middle school level as projected growth warrants. Understanding that elementary reductions may result in additional multi-grade combo classes. Estimates for subsequent reductions in FY27-28 are 4 FTE, FY28-29 4 FTE and FY29-30 1 FTE.
8. Strengthen absence management practices through consistent monitoring tools and clearly defined accountability structures at both site and central office levels.
9. Consider adoption of a formal structural balance board policy requiring that ongoing expenditures be supported by ongoing revenues and establishing minimum reserve targets above the state-required floor.
10. Conduct a formal analysis of maintenance trade staffing relative to square-footage benchmarks and develop a phased attrition management plan to capture efficiency opportunities without reducing custodial or grounds staffing.

Implementation Plan

The following phased implementation strategies are designed to advance HR operational systems, improve staffing alignment, and reduce long-term fiscal and compliance risk. The focus is to establish disciplined workforce management practices that support fiscal sustainability while maintaining appropriate service levels.

Short-Term (0–6 Months) — Establish System Discipline and Immediate Risk Controls

In the short term, the priority is to stabilize core staffing processes, improve position control transparency, and reduce exposure to compliance and fiscal risk. School Leaders will support the District by:

- Designing and facilitating the implementation of a formal vacancy management protocol, including decision-making criteria and documentation standards
- Supporting the development and launch of a structured monthly HR–Fiscal position control reconciliation process, including meeting agendas, reporting templates, and escalation pathways
- Assisting in the design of standardized onboarding and separation workflows that improve compliance tracking and operational consistency

- Conducting an independent review of open positions relative to contracted services and providing a reconciliation framework to align authorized FTE with actual expenditures
- Helping establish a cross-departmental contract review protocol that integrates fiscal oversight, HR compliance review, and programmatic approval
- Developing prototype workforce dashboards and reporting tools to improve visibility into vacancies, hiring activity, leave utilization, and funding sources
- Providing cross-functional facilitation and technical guidance to strengthen coordination between Human Resources, Fiscal Services, and program departments

Key deliverables: vacancy management framework and implementation roadmap; position control reconciliation structure and reporting tools; workforce dashboard design and launch support; contract review workflow model; HR operational process documentation.

Mid-Term (6–18 Months) — Workforce Model Calibration and Operational Integration

During the mid-term phase, the focus shifts to aligning staffing structures with workload demands and strengthening the District's ability to plan proactively. School Leaders will support the District by:

- Conducting analytical reviews of instructional aide staffing patterns and providing options for consolidating fragmented assignments into more stable workforce models
- Facilitating the development of a structured high-needs staffing framework that aligns service delivery expectations with fiscal sustainability considerations
- Supporting the implementation of integrated leave and vacancy reporting tools that enable predictive staffing adjustments
- Assisting leadership in establishing a coordinated staffing allocation calendar aligned to enrollment cycles and budget development timelines
- Providing comparative financial analysis frameworks to evaluate contracted versus in-house staffing models
- Supporting the development of small-school staffing benchmarks that balance program requirements with operational efficiency

Key deliverables: IA staffing structure analysis and modeling options; high-needs staffing model framework; contract vs. in-house cost comparison tools; integrated workforce reporting structures; small-school staffing benchmark analysis.

Long-Term (18–36 Months) — Strategic Workforce Planning and Fiscal Sustainability

The long-term phase emphasizes transitioning to a predictive workforce planning model that integrates staffing decisions with enrollment trends, fiscal projections, and operational priorities. School Leaders will support the District by:

- Assisting in the development of a multi-year staffing alignment plan based on enrollment projections, workforce trends, and fiscal capacity
- Supporting the integration of Human Resources workforce projections into long-range financial planning processes
- Providing decision-making frameworks that help distinguish between structural staffing requirements and discretionary staffing patterns
- Supporting the development of workforce analytics models that improve long-term liability forecasting related to compensation, benefits, and pension exposure
- Facilitating strategic planning discussions regarding shared staffing models and operational redesign opportunities

Key deliverables: multi-year workforce alignment model; workforce analytics and forecasting tools; strategic staffing decision frameworks; long-range HR planning integration support.

School Leaders' role in this improvement effort is to provide structured guidance, technical expertise, and implementation support to district leadership — translating staffing data into actionable planning frameworks, facilitating cross-departmental alignment, building internal capacity for sustainable workforce management, and supporting the District's transition from reactive staffing adjustments to predictive, data-informed workforce planning.

Conclusion

The findings of this review do not indicate systemic instability in the Human Resources function. Rather, they reflect a department actively working to align staffing structures, internal processes, and long-range planning with evolving enrollment patterns and regulatory expectations. Foundational controls are in place, and the District has made measurable progress in strengthening oversight, improving coordination between functional areas, and increasing clarity in staffing practices.

The next phase of this work centers on institutionalizing these improvements — embedding consistent reconciliation processes, enhancing data visibility through integrated systems, and formalizing governance structures that support sustainable operational alignment. With continued focus and disciplined implementation, MUSD is positioned to advance its operational maturity while maintaining appropriate instructional support and service to students.

Technology Review

Executive Summary

MUSD has established a solid technology foundation relative to its size and geographic context. The District's cybersecurity posture is strong — supported by an active E-Rate pilot covering anti-virus, content filtering, and penetration testing — and the District benefits from $1.8 million in annual E-Rate funding, which is being fully maximized. Dual data centers with active replication, UPS coverage across all network closets, and a 10 Gbps connection at the District Office provide reliable infrastructure. The technology support team maintains an average of 2.3 open tickets districtwide, an indicator of operational effectiveness at the site level.

At the same time, the review identified several areas where cost efficiency and operational alignment can be strengthened. The highest-value near-term opportunity is issuing an RFP for VoIP phone system replacement, projected to yield approximately $70,000 or more in annual savings. A structured audit of the District's 170+ active third-party applications represents additional significant savings potential, as does a review of software contracts totaling over $16,600 annually. The District currently lacks a funded multi-year device refresh plan and a formal software governance process, both of which present fiscal and operational risk.

Longer-term, the District is positioned to develop a funded five-year device refresh plan, implement a district AI strategy, and pursue expansion of STEAM Labs with a potential $2 million co-funding grant. Taken together, the recommendations in this report are estimated to yield more than $200,000 in annual savings once fully implemented, in addition to meaningful operational and instructional improvements.

Background and Scope

This technology review was conducted to assess the District's current technology ecosystem with a primary focus on cost efficiency, operational effectiveness, and student learning outcomes. The review included semi-structured stakeholder interviews with district leadership, site administrators, and technology staff, along with analysis of key systems, contracts, and operational data.

The following documents were reviewed as part of this assessment:

Item	Category	Annual Impact
IT Budget Report (updated 2-12-26)	Budget Document	Itemized IT spending FY 2024–2026; vendor costs; refresh history

Item	Category	Annual Impact
IT Department Positions & Responsibilities	Staffing Document	Roles, responsibilities, and coverage detail across all IT positions
Proposed IT Org Chart (2025–2026)	Org Chart	Proposed structure with new positions and revised reporting lines
FY 2025 E-Rate Category 2 Planning Agenda & Balance	E-Rate Document	Cat 2 funding balance, planned expenditures, and compliance status
MUSD Technology Review — Interview Framework	Assessment Tool	Interview guide and methodology used during stakeholder site visits

Study Team

The study team included Mike Morrison, School Leader Advisor, who was responsible for conducting the analysis, facilitating interviews, reviewing district documentation, and developing findings and recommendations. District leadership and staff supported the review by providing data, documentation, and access to personnel across departments. Their cooperation and responsiveness contributed significantly to the completion of the study.

Key Findings

The review identified four primary findings across the District's technology operations.

- **Infrastructure and cybersecurity are well-managed:** The District has invested strategically in core infrastructure and is maximizing available E-Rate funding. Cybersecurity practices are active and documented, and the support team's ticket volume reflects strong day-to-day operational performance.
- **Software governance is underdeveloped:** The District operates 170+ active third-party applications with no reliable tracking of usage, cost-per-user, or renewal management. This represents a significant and quantifiable source of unnecessary expenditure. No formal software selection or renewal process is in place.
- **Asset management lacks accountability structure:** The District does not maintain a comprehensive hardware inventory by site and assigned user. Staff hardware check-out and return processes are inconsistent, creating asset loss risk — particularly at staff separation.
- **IT and Instructional Services operate in silos:** Technology is purchased without full IT input; systems are deployed without adequate teacher training; and tools are

underutilized because the two departments are not coordinating on planning, procurement, or professional development.

Analysis

Cybersecurity and Infrastructure

- **E-Rate Cybersecurity Pilot ($300,000 value):** The District is participating in an E-Rate-funded cybersecurity pilot covering anti-virus software, content filtering, and external penetration testing across network zones.
- **Security Audit Results:** The most recent security audit reflects strong follow-through on controls and effective grant management practices. The District is actively maintaining its security posture.
- **Dual Data Centers with Replication:** Two data centers with active replication and tape backups protect critical district data and ensure operational continuity in the event of a site failure.
- **UPS Coverage in All IDFs/MDFs:** Uninterruptible power supplies provide up to 6 hours of backup power across all network closets — sufficient to protect VoIP, PA systems, and network infrastructure during outages.
- **Strong Connectivity and Access Management:** Spectrum provides 10 Gbps at the District Office. SSSO, Active Directory/LDAP, an app portal, and Raptor visitor management provide layered, well-managed access and safety infrastructure.

Instructional Technology and Ed Tech

- **iReady Implementation:** The District is actively using iReady and monitoring student progress data, including 277 English Learner students tracked through the Elevation Progress feature.
- **Canvas LMS at Middle/High School:** Canvas provides a consistent learning management system at the secondary level, supporting organized digital learning for teachers and students.
- **Clever for Single Sign-On:** Clever provides SSO for most district applications, reducing access friction for staff and students while improving account security.
- **Synergy SIS with Parent Portal:** Synergy serves as the student information system with a functioning parent portal, supporting family engagement and communication transparency.
- **STEAM Labs:** The Ed Tech TOSA provides active, in-person support for STEAM Labs, connecting technology to hands-on, project-based learning across sites.

- **Panorama Survey Data:** The District is collecting and using Panorama survey data to inform decisions — a practice that could be expanded to technology satisfaction and tool usage monitoring.

Device Management and Technical Support

- **Windows Device Fleet, K–12:** All students have access to Windows laptops, currently managed in classroom carts. The District holds Dell certification for in-warranty repairs and maintains a 10 percent spare pool. This foundation supports a planned transition to a 1:1 take-home model for grades 5–12.
- **Dell Warranty and Repair Program:** The District is Dell-certified for in-warranty repairs and receives reimbursement for warranty work.
- **Open Ticket Volume:** An average of 2.3 open support tickets is consistent with a capable, responsive team and well-maintained systems.
- **In-House Repair vs. Warranty Analysis:** The District should conduct a formal analysis comparing the cost and turnaround time of in-house repairs against sending devices out under warranty, factoring in labor cost, parts cost, device downtime, and Dell warranty reimbursement value.

Financial and Funding Strengths

- **$1.8 Million in Annual E-Rate:** The District is maximizing one of the most valuable funding streams available to K–12 schools.
- **Measure C Bond:** The bond measure's language includes "improve outdated technology," creating a potential funding pathway for device refresh and infrastructure investment.

Proactive Financial Stewardship

Prior to July 2025, when IT reported under Business Services, the IT Director worked closely with the CBO and proactively identified cost-saving opportunities ahead of budget pressure.

- **Printer Support — Transitioned In-House:** IT recommended and executed the full transition of printer support, maintenance, and refresh cycles in-house, without adding staff or outside consultants. Estimated savings: $50,000+ per year.
- **Cybersecurity E-Rate Pilot — Designed to Save:** The cybersecurity pilot application was structured to both improve services and minimize future financial impact. When fully funded, it is projected to save approximately $100,000 per year for three years.

- **VoIP Replacement — Budget-Conscious Design:** The VoIP replacement plan was designed with cost recovery built in. Estimated savings of $50,000–$70,000 per year. The $120,000 initial deployment cost was already budgeted, putting the District on a path to full recovery within two years of implementation.

These three initiatives represent a proactive, cumulative savings potential of more than $200,000 per year once fully implemented.

AI Readiness

The District has convened a 12-person AI Committee that includes the Director of Secondary Education and classroom teachers. The committee is drawing on published AI policy frameworks from leading K–12 districts to accelerate guidelines development. This cross-functional structure appropriately balances administrative oversight with classroom voice.

Recommendations

1. Issue an RFP for VoIP phone system replacement. Issue a parallel RFP for PA and bell systems specifying non-proprietary solutions to prevent vendor lock-in.
2. Issue an RFP for PA and bell system requiring non-proprietary standards.
3. Conduct a structured audit of 170+ active third-party application licenses for redundancy and non-use, with a target of completing a full usage and cost report within 60 days.
4. Implement software usage monitoring (ClassLink Analytics, GoGuardian, or vendor reports). Establish a policy that no contract is renewed without usage data review; fewer than 30 percent active monthly users constitutes a default non-renewal unless a documented intervention plan exists.
5. Conduct a full hardware inventory by site covering all student devices, staff laptops, carts, projectors, and peripherals. This is the prerequisite for all asset management improvements.
6. Centralize staff and student hardware check-out and check-in through the school library at each site. Implement a year-end sign-off sheet and an exit check-out process for departing staff.
7. Establish a joint IT/Instructional Services project planning calendar. No classroom technology purchase or deployment should proceed without both departments aligned.
8. Formalize Educational Tech Lead monthly meetings with a confirmed $1,500 per year stipend structure.

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9. Finalize a formal AI Acceptable Use Policy and staff/student guidelines by end of the current school year. Integrate AI guidance into annual professional development.
10. Bring the STEAM Labs co-funding strategy to the board and authorize pursuit of the COOR Fund grant ($2 million potential).
11. Develop a funded five-year device refresh plan with annual funding projections and Measure C alignment.
12. Evaluate transitioning grades 5–12 to a 1:1 take-home device model beginning with the next refresh cycle, with K–4 remaining cart-based.
13. Conduct a formal low cost Windows vs. Chromebook total cost of ownership comparison before committing to the next device purchase cycle.
14. Evaluate excluding the internal OPS module from new interactive screen purchases, with an estimated savings of approximately $345,000 over a full refresh cycle.
15. Expand smart irrigation system integration across additional school sites. Conduct a baseline water usage audit to establish savings measurement methodology. Projected savings: $50,000–$100,000 annually once fully implemented.
16. Fill the current East Site Technician vacancy.
17. Evaluate the proposed IT organizational restructuring for 2025–2026 in the context of the District's broader budget position.
18. Review Typing.com and KAMI contract utilization (up to $13,800 and $2,800 per year respectively).
19. Analyze Microsoft/Google licensing overlap (Office 365 and Google Workspace).
20. Establish a K–12 student communication standards policy. Consolidate around Synergy's parent portal as the primary vehicle for official communication.

Implementation Plan

Short-Term (0–6 Months) — Immediate Cost Recovery and Operational Controls

The following actions represent the highest-value, most actionable improvements available in the near term. Several require only internal process changes; others involve issuing RFPs or reviewing existing contracts. Together, they represent a potential of $100,000 or more in identifiable annual savings, plus meaningful operational and instructional improvements.

#	Action	Timeline	Financial Impact
1	Issue RFP for VoIP phone system replacement	0–6 months	~$70,000+/year savings

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#	Action	Timeline	Financial Impact
2	Issue RFP for PA/Bell system — require non-proprietary standard	1–3 months	Avoids vendor lock-in
3	Audit 170+ third-party app licenses for redundancy and non-use	0–3 months	Significant — TBD
4	Implement software usage monitoring (ClassLink, GoGuardian, or vendor reports)	1–3 months	Prevents waste on unused tools
5	Complete full hardware inventory by site (devices, carts, peripherals)	0–3 months	Asset accountability
6	Create staff/teacher hardware exit check-out process through the library	1–2 months	Reduce asset loss
7	Implement year-end library sign-off sheet for all staff hardware	2–3 months	Full accountability cycle
8	Create IT/Instruction joint project planning calendar and meeting cadence	0–2 months	Alignment & efficiency
9	Review Typing.com contract value and classroom usage	0–2 months	Up to $13,800/year
10	Review KAMI formative tool contract and utilization	0–2 months	Up to $2,800/year
11	Audit cart inventory — identify K–4 cart needs; plan phase-out of carts for grades 5–12 as 1:1 rollout proceeds	1–3 months	Reduces upkeep cost
12	Stock each classroom with 3–5 portable charging batteries for 1:1 students with low-charge devices	As needed	Eliminates dead-battery disruptions
13	Analyze Microsoft vs. Google licensing overlap (Office 365 + GWorkspace)	1–3 months	Licensing savings TBD
14	Launch customer satisfaction survey for tech support	0–1 month	Service benchmarking
15	Survey students/staff on home connectivity and offline experience	0–2 months	Equity & E-Rate data
16	Formalize Educational Tech Leads stipend ($1,500/year) + monthly meetings	1–2 months	Capacity building
17	Move cabling costs to M&O budget	1–2 months	Budget realignment
18	Establish K–12 student communication standards policy	2–4 months	Equity & consistency

Spotlight: VoIP RFP

The District's current phone system is the single clearest cost-saving opportunity identified in this review. Issuing an RFP for a modern, non-proprietary VoIP system is projected to yield approximately $70,000 or more in annual savings. Estimated startup cost is $20,000, with an ongoing system cost of approximately $50,000 per year, representing a strong and relatively fast return. A parallel RFP for PA and bell systems should specify non-proprietary solutions to prevent vendor lock-in.

Spotlight: Software Management and Usage Monitoring

The District operates 170+ active third-party applications with no reliable tracking of which are actually used. A structured audit should identify redundant tools, unused licenses, and overlapping functions. A formal selection process should be established — including a standardized request form, a teacher pilot period, and a clear policy against paying for applications twice. No contract should be renewed without usage data review.

Spotlight: Device Usage Audit

A device inventory and cart audit is the first step toward transitioning grades 5–12 to a 1:1 take-home model. Current cart condition, device counts by site, and assignment status must be documented before a right-sized refresh purchase can be made.

Spotlight: Hardware Inventory and Library-Based Check-Out

A full hardware inventory should be conducted immediately by site, device type, and condition. All staff and student hardware check-out and check-in should be centralized through the school library at each site. A year-end sign-off process and an exit check-out process for departing staff should be implemented. The Follett (ROY) process already in use at Palm Vista Elementary should be standardized across all sites.

Spotlight: IT and Instruction Coordination

A joint IT/Instruction project planning calendar should be established. No classroom technology purchase or deployment should proceed without both departments aligned. The Ed Tech TOSA should serve as the formal bridge between IT operations and classroom instruction, with a defined role in both the software selection process and professional development planning.

Mid-Term (6–18 Months) — Governance, Planning, and Program Development

During the mid-term phase, the focus shifts from immediate cost recovery to building the governance structures and strategic plans that will sustain long-term operational and fiscal alignment.

- **Finalize a formal AI Acceptable Use Policy and staff/student guidelines.** Integrate AI guidance into annual professional development, with exploration of practical applications in instruction, assessment design, and administrative efficiency.
- **Bring the STEAM Labs co-funding strategy to the board and authorize pursuit of the COOR Fund grant ($2 million potential).** Assign curriculum development leadership to ensure STEAM units are teacher-designed and instructionally grounded.
- **Develop a funded five-year device refresh plan with annual funding projections built into the budget and aligned with Measure C bond language.** Conduct a formal Windows vs. Chromebook total cost of ownership comparison before committing to the next device purchase cycle.

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- **Evaluate transitioning grades 5–12 to a 1:1 take-home device model.** Begin a pilot at one school site, tracking repair incidents, charging issues, and staff and student feedback. K–4 should remain cart-based.
- **Evaluate the proposed IT organizational restructuring for 2025–2026 in the context of the District's broader budget position.** Conduct a formal technology staffing analysis against the industry benchmark of approximately 1 technology staff member per 1,000 students.
- **Complete VoIP implementation following the RFP process.** Target summer implementation to minimize classroom disruption.
- **Evaluate excluding the internal OPS module from new interactive screen purchases, with an estimated savings of approximately $345,000 over a full refresh cycle.** Conduct a pilot site with structured feedback before district-wide rollout.
- **Establish a K–12 student communication standards policy.** Consolidate around Synergy's parent portal as the primary vehicle for official communication.

Long-Term (18+ Months) — Strategic Investment and Refresh Execution

The long-term phase focuses on executing the plans developed in prior phases and embedding technology governance into the District's ongoing planning and budget cycles.

- Execute the five-year device refresh plan in alignment with enrollment trends, Measure C bond funding, and the outcome of the Windows vs. Chromebook evaluation. Roll out 1:1 take-home devices for grades 5–12 district-wide based on pilot findings.
- Expand smart irrigation system integration across all remaining school sites. Conduct a baseline water usage audit to establish savings measurement methodology. Projected savings: $50,000–$100,000 annually once fully implemented.
- Embed software governance — selection, usage monitoring, and renewal review — as a standing annual process managed jointly by IT and Instructional Services.
- Embed technology planning and budget alignment into the District's annual budget development calendar, ensuring that device refresh, infrastructure investment, and instructional technology expenditures are projected on a rolling multi-year basis.

Financial Impact Summary

Item	Category	Annual Impact
VoIP System RFP & Replacement	Cost Savings	~$70,000+/year
E-Rate Annual Funding (fully maximized)	Existing Offset	$1,800,000/year

Item	Category	Annual Impact
Cybersecurity E-Rate Pilot	Cost Offset/Savings	\$300K value + ~\$100K/yr × 3 yrs
Printer Support — In-Housed	Cost Savings	\$50,000+/year
Interactive Screen Refresh (no OPS)	Capital Avoidance	~\$345,000 (one-time)
Smart Irrigation Integration	Long-term Savings	\$50K–\$100K/year (TBD)
Software Audit — 170+ Applications	Cost Savings	Significant — TBD
Typing.com Contract Review	Cost Savings	Up to \$13,800/year
KAMI Formative Tool Review	Cost Savings	Up to \$2,800/year
Microsoft / Google Licensing Overlap	Cost Savings	TBD
STEAM Labs — COOR Fund Grant	Potential Revenue	\$2,000,000 (one-time)
Measure C Bond — Tech Eligible	Capital Funding	Allocation TBD

Conclusion

MUSD's technology program reflects a well-managed foundation with meaningful opportunities to reduce costs, strengthen governance, and deepen instructional integration. The District is maximizing its E-Rate investment, maintaining strong infrastructure reliability, and has demonstrated proactive financial stewardship in areas including printer support, cybersecurity, and VoIP planning.

The work ahead is primarily one of structure and governance — establishing software selection and renewal processes, formalizing asset management, coordinating IT and Instructional Services planning, and building a funded multi-year device refresh cycle. The near-term recommendations in this report, if implemented in sequence, are estimated to yield more than \$100,000 in annual savings within the first six months. Progress on each recommendation should be reviewed quarterly by district leadership to ensure accountability and momentum.

Maintenance & Operations Review

Executive Summary

Morongo Unified School District's Maintenance and Operations function supports 17 school sites across a geographically dispersed service area totaling approximately 897,284 square feet of building space and 285.45 acres of grounds. This review evaluated current custodial, maintenance, and grounds staffing levels against facility-based operational benchmarks and assessed the District's management and supervision structure relative to the scale of its facilities portfolio.

The review found that custodial staffing is near benchmark districtwide at approximately 48.0 FTE against a calculated need of 44.86 FTE, though distribution across sites is uneven, with some elementary campuses above benchmark and several secondary sites below. Grounds staffing, at approximately 7.0 filled positions, is significantly below the acreage-based benchmark of 28.55 FTE and should not be reduced further. Maintenance trade staffing represents the primary area of structural overage: the current roster of 13.0 field positions exceeds the square-footage-based benchmark of 8.97 FTE, indicating a reduction opportunity of approximately 4.0 FTE. Management and supervision layers — currently comprising approximately 6.0 positions across maintenance, custodial, and grounds — exceed what the District's facility portfolio size supports, and consolidation to two management roles is recommended.

The recommended approach throughout is one of attrition and vacancy management rather than immediate across-the-board reductions. Protecting core trades — specifically HVAC and electrical — is a prerequisite of the maintenance reduction strategy. Custodial reductions should be pursued through redeployment from over-benchmarked to under-benchmarked sites before positions are eliminated. The phased implementation plan is designed to achieve staffing targets over a 12–24 month period while maintaining service levels, defining accountability structures, and building the preventive maintenance infrastructure necessary to sustain a smaller long-term staffing model.

Background and Scope

This review evaluated Morongo Unified School District's Maintenance and Operations staffing against facility-based operational benchmarks. Custodial and grounds staffing formulas are evaluated on the basis of facility square footage and site acreage respectively. Maintenance staffing carries more variables and ratios are therefore used as comparative benchmarks rather than strict requirements.The benchmarks applied in this report are as follows:

Staff Category	Benchmark Used in This Report
Grounds Worker	20,000 square feet per custodian
Maintenance Worker (revised)	100,000 square feet per maintenance worker
Grounds Worker	25 acres per grounds worker

The revised maintenance benchmark of 1 maintenance worker per 100,000 square feet aligns with national K–12 medians that commonly range from approximately 86,000 to 107,000 square feet maintained per maintenance worker. The original APPA comparative factor of 25,000 square feet per maintenance worker was not used as it produces unrealistically high maintenance headcount when applied across an entire K–12 portfolio and is not aligned to national K–12 operating benchmarks.

Study Team

This review was conducted by Joe Dixon, President, School Leaders, who was responsible for conducting the staffing analysis, reviewing district-provided facilities and staffing data, and developing findings and recommendations. District leadership and facilities staff supported the review by providing staffing records, site square footage and acreage data, and access to Maintenance and Operations personnel.

Key Findings

The review identified four primary findings across the District's Maintenance and Operations function.

- **Maintenance trade staffing is above the square-footage benchmark:** Using the national K–12 median benchmark of 1 maintenance worker per 100,000 square feet, MUSD's facility portfolio of 897,284 square feet supports a staffing need of approximately 8.97 FTE. The current roster of 13.0 maintenance trade and field positions represents a structural overage of approximately 4.0 FTE. The recommended reduction strategy protects HVAC and electrical capacity and pursues reductions through attrition and vacancy management rather than immediate separations.
- **Management and supervision layers exceed what the facility portfolio supports:** The current structure includes approximately 6.0 supervisory and foreman positions across maintenance, custodial, and grounds. At under 1.0 million square feet, the portfolio does not support separate supervisory chains for each function. Consolidation to two management roles — Director and Operations Manager — plus a working Night Lead is recommended, reducing management positions by

approximately 3.0 while maintaining operational oversight and night custodial coordination.

- **Custodial staffing is near benchmark districtwide but unevenly distributed:** At 48.0 FTE against a benchmark of 44.86, districtwide custodial staffing is approximately 3.14 FTE above benchmark. However, several secondary sites are below benchmark while some elementary sites exceed it. Broad custodial reductions are not recommended. Instead, redeployment from over-benchmarked to under-benchmarked sites should be the first lever, with attrition used to capture modest reductions over time.
- **Grounds staffing is below benchmark and should not be reduced:** At approximately 7.0 filled positions against an acreage-based benchmark of 28.55 FTE, grounds is significantly understaffed relative to the District's 285.45 acres. No reductions are recommended. Workload should be managed through route planning, irrigation prioritization, and seasonal contracting. The one vacant grounds position should not be filled, consistent with the overall vacancy management approach, but filled staffing should be maintained at current levels.

Analysis

Staffing Analysis per site

The following site-by-site analysis applies the benchmark standards above to MUSD site square footage and acreage across all school sites. Staffing needs are presented by custodians, maintenance workers, and grounds workers required at each site.

Elementary Schools

Condor Elementary	
Square Feet	46,124
Acres	10.00
Custodians Needed	2.31
Maintenance Workers Needed	0.46
Grounds Workers Needed	0.40
Friendly Hills Elementary	
Square Feet	35,341
Acres	10.00
Custodians Needed	1.77
Maintenance Workers Needed	0.35
Grounds Workers Needed	0.40
Joshua Tree Elementary	

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Square Feet	44,200
Acres	19.00
Custodians Needed	2.21
Maintenance Workers Needed	0.44
Grounds Workers Needed	.76
Landers Elementary	
Square Feet	22,870
Acres	9.0
Custodians Needed	1.14
Maintenance Workers Needed	0.23
Grounds Workers Needed	.36
Morongo Valley Elementary	
Square Feet	26,237
Acres	8.50
Custodians Needed	1.31
Maintenance Workers Needed	0.26
Grounds Workers Needed	.34
Oasis Elementary	
Square Feet	60,532
Acres	15.60
Custodians Needed	3.03
Maintenance Workers Needed	0.61
Grounds Workers Needed	0.62
Onaga Elementary	
Square Feet	54,203
Acres	16.40
Custodians Needed	2.71
Maintenance Workers Needed	0.54
Grounds Workers Needed	0.66
Palm Vista Elementary	
Square Feet	40,793
Acres	9.30
Custodians Needed	2.04
Maintenance Workers Needed	0.41

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Grounds Workers Needed	0.37
Twentynine Palms Elementary	
Square Feet	58,662
Acres	23.00
Custodians Needed	2.93
Maintenance Workers Needed	0.59
Grounds Workers Needed	0.92
Yucca Mesa Elementary	
Square Feet	44,470
Acres	10.00
Custodians Needed	2.22
Maintenance Workers Needed	0.44
Grounds Workers Needed	0.40
Yucca Valley Elementary	
Square Feet	56,972
Acres	15.50
Custodians Needed	2.85
Maintenance Workers Needed	0.57
Grounds Workers Needed	0.62
Total Staffing Benchmarks for Elementary Schools	
Custodians	24.52
Maintenance	4.90
Grounds	5.85

Middle Schools

La Contenta Middle	
Square Feet	73,227
Acres	29.00
Custodians Needed	3.66
Maintenance Workers Needed	0.73
Grounds Workers Needed	1.16
Twentynine Palms Junior High	
Square Feet	59,089
Acres	30.00
Custodians Needed	2.95

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Maintenance Workers Needed	0.59
Grounds Workers Needed	1.20
Total Staffing Benchmarks for Middle Schools:	
Custodians	6.62
Maintenance	1.32
Grounds	2.36

High Schools

Black Rock High	
Square Feet	13,806
Acres	3.80
Custodians Needed	0.69
Maintenance Workers Needed	0.14
Grounds Workers Needed	0.15
Twentynine Palms High	
Square Feet	106,218
Acres	38.40
Custodians Needed	5.31
Maintenance Workers Needed	1.06
Grounds Workers Needed	1.54
Yucca Valley High	
Square Feet	139,774
Acres	37.60
Custodians Needed	6.99
Maintenance Workers Needed	1.40
Grounds Workers Needed	1.50
Total Staffing Benchmarks for High Schools:	
Custodians	12.99
Maintenance	2.60
Grounds	3.19

Other Sites

Academy of College & Career Excellence - East	
Square Feet	9,006
Acres	0.35

Custodians Needed	0.45
Maintenance Workers Needed	0.09
Grounds Workers Needed	0.01
Academy of College & Career Excellence - West	
Square Feet	5,760
Acres	N/A
Custodians Needed	0.29
Maintenance Workers Needed	0.06
Grounds Workers Needed	N/A
PLUS Program	
Square Feet	N/A
Acres	N/A
Custodians Needed	N/A
Maintenance Workers Needed	N/A
Grounds Workers Needed	N/A
Total Staffing Benchmarks for Other:	
Custodians	0.74
Maintenance	0.15
Grounds	0.01

Summary of Custodial Needs

Current custodial FTE totals 48.0 compared to the 20,000 SF benchmark of 44.86, representing approximately 3.14 FTE above benchmark. Because several campuses are below benchmark — notably at the high school level — the most defensible approach is to capture reductions through attrition and vacancy management and/or redeploy positions from over-benchmarked elementary sites to under-benchmarked secondary sites where service levels must be preserved.

Summary of Maintenance Needs (Revised for Reduction Planning)

Using the revised K–12 benchmark of 100,000 SF per maintenance worker, MUSD's total portfolio of 897,284 square feet equates to a maintenance staffing benchmark of 8.97 (9.0) FTE. The current roster lists 13 maintenance trade and field positions excluding supervisors and foremen, indicating an opportunity to reduce approximately 4.0 maintenance FTE while protecting critical trades.

Maintenance Staffing	FTE
Current maintenance field positions (roster)	13.0
Benchmark need (100,000 SF per worker)	8.97
Reduction opportunity (current – need)	4.03

The reduction strategy prioritizes: preserving journey-level electrical and HVAC capacity as core systems uptime trades; reducing general maintenance headcount through attrition and shifting periodic and specialty work (roofing, painting, locksmith overflow) to on-call contracts; and consolidating East/West coverage using a single dispatch queue and planned weekly route schedules supported by a Comprehensive Maintenance Plan and preventive maintenance calendar.

Summary of Grounds Needs

Using 1 groundskeeper per 25 acres, MUSD's 285.45 acres equate to a benchmark of 11.42 grounds FTE. The roster lists approximately 7 filled groundskeeper positions plus one vacancy, meaning grounds staffing is significantly below benchmark. Grounds is not a recommended area for staffing cuts. Focus should be on route planning, irrigation prioritization, and seasonal contracting to manage costs. The vacant position should not be filled, consistent with the overall vacancy management approach.

Summary of Management Structure

The current roster shows multiple supervisory and foreman layers across maintenance, custodial, and grounds. For reduction planning and clearer accountability, the recommended management structure consolidates to two management roles plus a working Night Lead.

Role	Recommendation (Based on current schools)
Director	1
Operations Manager (Grounds & Custodial)	1
Night Lead (working lead)	1

Management consolidation rationale: at under 1.0 million square feet, MUSD's facility portfolio size does not justify separate supervisors for maintenance, grounds, and custodial plus multiple foremen layers. Consolidating supervision to two management positions — Director and Operations Manager — increases accountability, with one Operations Manager owning deployment, schedules, customer service, and performance metrics for Grounds and Custodial. Night coverage should be maintained through a working Night Lead rather than a management layer. Maintenance task coordination can be handled via working trade leads rather than additional supervisors.

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Maintenance trade leads function as working leads and are not included in management staffing totals.

Reduction Plan Summary

Area	Current (FTE)	Recommended Target	Net Reduction
Maintenance field staff (excludes supervisors / foremen)	13.0	9.0	4.0
Notes / Rationale Benchmark basis: 8.97 FTE @ 100,000 SF per worker for 897,284 SF. Protect HVAC/electrical; reduce general maintenance via attrition and shift periodic /specialty work to on-call contracts.			
Mgmt. and supervision (supervisor / foreman layers)	6.0	3.0 (2 mgmt + Night Lead)	3.0[2]
Notes / Rationale Adopt two management roles only: Director + Operations Manager (Grounds & Custodial). Reclass one existing foreman role as a working Night Lead (non-management) and eliminate redundant supervisor/foreman layers.			
Custodial	48.0	46.0	2.0
Notes / Rationale Benchmark basis: 44.86 FTE @ 20,000 SF per custodian. Because some secondary sites are below benchmark, capture reductions through attrition /vacancy at over-benchmarked sites and redeploy before eliminating positions.			
Grounds	7.0 (+1.0 vacant)	7.0 (do not fill vacancy)	0.0 filled (1.0 vacancy hold)
Notes / Rationale Acreage basis: 285.45 acres (1 per 10 acres indicates understaffed). Do not reduce filled staffing; eliminate the vacant position and manage workload through route planning and seasonal contracting.			

Recommendations

1. Freeze hiring for general maintenance positions and do not fill the vacant grounds position until staffing targets are reached.

[2] Management positions are reduced from 6 to 2; one existing foreman role is repurposed to a non-management Night Lead (no net add).

2. Implement the two-role management structure: Director and Operations Manager (Grounds and Custodial). Convert one existing foreman position to a working Night Lead to coordinate custodial coverage and reduce supervision layers.
3. Reduce maintenance field staffing from 13.0 FTE to a target of 9.0 FTE through attrition and vacancy management. Protect HVAC and electrical capacity throughout the reduction period.
4. Establish an on-call contract bench for roofing, painting, locksmith overflow, and other periodic specialty work to maintain service capability with a smaller in-house maintenance roster.
5. Adopt a work-order triage protocol (life/safety, instructional disruption, preventive maintenance, routine) and track response times weekly.
6. Redeploy custodial positions from over-benchmarked elementary sites to under-benchmarked secondary sites before eliminating positions.
7. Develop and implement a Comprehensive Maintenance Plan and preventive maintenance calendar to reduce reactive work and support a smaller long-term staffing model.
8. Define service level targets for cleaning frequencies by site type and response times for life/safety and instructional disruptions.
9. Standardize East/West route schedules and implement a single dispatch queue for maintenance coverage.
10. Do not reduce grounds staffing below current filled levels. Manage grounds costs through route planning, irrigation prioritization, and seasonal contracting.

Implementation Plan

The following phased approach emphasizes attrition and vacancy management to achieve staffing targets while maintaining service levels across all sites.

Short-Term (0–6 Months) — Establish Control Mechanisms and Immediate Structural Changes

- Adopt the revised management structure: Director and Operations Manager. Reclassify one foreman position to working Night Lead.
- Freeze hiring for general maintenance positions and eliminate the vacant grounds position.
- Establish an on-call contract bench for specialty and periodic work including roofing, painting, and locksmith overflow.
- Launch work-order triage and a weekly work-order dashboard tracking volume and closure time by priority category.

These actions establish an immediate reduction path without requiring layoffs and put control mechanisms in place to monitor service levels throughout the transition.

Mid-Term (6–18 Months) — Sustained Headcount Reduction and Route Standardization

- Reduce maintenance headcount through attrition to the 9.0 FTE target.
- Standardize East/West route schedules and implement a single dispatch queue for maintenance coverage.
- Adjust contract mix and reduce overtime as headcount approaches benchmark.

This phase delivers sustained headcount reductions while measured service impacts and contract support ensure continuity across sites.

Long-Term (18+ Months) — Preventive Maintenance and Service Level Optimization

- Implement a preventive maintenance calendar and conduct quarterly Comprehensive Maintenance Plan reviews.
- Capture custodial reductions through vacancy management and redeployment. Consider additional custodial reductions only if secondary site service levels remain stable.
- Reassess work-order metrics and campus cleanliness scores against defined service level targets.

This phase locks in reductions achieved in prior phases, prevents cost creep, and embeds the preventive maintenance structures necessary to maintain baseline good-repair services within the reduced staffing model.

Assumptions used in all targets: 20,000 SF per custodian; 100,000 SF per maintenance worker; 25 acres per groundskeeper. Building square footage and acreage are from the MUSD site list used in this report.

Conclusion

This review confirms that MUSD's Maintenance and Operations staffing is broadly aligned with operational benchmarks in custodial and grounds functions. The primary area requiring corrective action is maintenance trade staffing, where the current roster exceeds the square-footage-based benchmark by approximately 4.0 FTE, and management layering, where the current supervisory structure exceeds what the District's facility portfolio size supports. Neither condition requires immediate or disruptive action. The phased attrition and vacancy management approach outlined in this report provides a defensible, service-preserving path to achieving benchmark alignment over a 12–24 month period.

Sustaining the reductions achieved through this process will depend on two operational investments: the development and consistent use of a Comprehensive Maintenance Plan and preventive maintenance calendar, and the establishment of defined service level targets against which custodial and maintenance performance can be measured over time. Without these structures in place, reductions in headcount risk creating deferred maintenance exposure and facility degradation that would ultimately exceed the cost savings achieved. With them in place, MUSD can maintain safe, functional facilities across its multi-campus system at a staffing level aligned to its current enrollment and facilities footprint.

Business Services Review

Executive Summary

MUSD operates within a stable but tightening fiscal environment and has established the foundational elements expected of a well-functioning school system. The District consistently meets statutory requirements for budget adoption and interim reporting, maintains a positive certification, and has developed comprehensive Budget Preparation Guidelines that reflect a thoughtful approach to fiscal planning. The alignment of the budget with the Local Control and Accountability Plan further demonstrates an intentional effort to connect financial resources to student outcomes and district priorities.

At the same time, the District's current financial position must be understood within the context of ongoing deficit spending in the unrestricted general fund and a declining multiyear projection ending fund balance. While reserves remain above required minimums, the Second Interim reflects a pattern of planned drawdown over time. Key fiscal indicators remain within reasonable ranges — unrestricted salaries and benefits are projected at approximately 81.2 percent, indicating controlled personnel costs, and unrestricted contributions to restricted programs are increasing at a moderate rate of approximately 1.8 percent annually.

This review finds that while the District's fiscal framework is well-designed, the strength of those structures is not yet matched by consistent system execution. Processes intended to guide decision-making — such as zero-based budgeting, staffing alignment, and purchasing protocols — are not consistently implemented or understood across all levels of the organization. Position control, one of the most critical components of a sound financial system, is not functioning as a unified process, creating risk in the District's ability to accurately align staffing, payroll, and budget. Operational challenges identified through interviews and survey input further reinforce these findings, with purchasing inefficiencies, approval delays, and inconsistent application of internal controls leading site and department staff to develop workarounds to meet immediate needs.

MUSD is not facing an immediate fiscal crisis. However, it is operating within a managed but declining financial position. Strengthening systems, clarifying expectations, and improving execution will be essential to addressing structural deficit spending and ensuring long-term financial stability and operational effectiveness.

Background and Scope

At the request of district leadership, a review was conducted of MUSD's business services and budget systems, with a focus on evaluating the effectiveness, consistency, and integration of fiscal practices across the organization. The purpose of this review is to assess how well current systems support accurate budgeting, financial sustainability, and operational efficiency, and to identify opportunities for strengthening internal processes and controls. The review focuses on systems and processes rather than individual performance and is intended to provide practical, actionable insight to support continuous improvement.

The study utilized a comprehensive, multi-method approach integrating quantitative financial data with qualitative stakeholder input. This included in-depth review of financial and operational documents, targeted leadership interviews to gain insight into how systems operate in practice, and a districtwide survey of site and department leaders to capture broader organizational perspectives and surface operational challenges experienced at the school and program level.

The following core areas were evaluated:

- Budget development and assumptions
- Budget monitoring and interim reporting
- Position control and staffing alignment
- Payroll and personnel cost projections
- Internal controls and purchasing workflows
- Organizational alignment and cross-department integration

Documents reviewed include the 2024–25 Unaudited Actuals, 2025–26 Adopted Budget, First Interim Report, 2025–26 Second Interim Report, independent audit report, Budget Preparation Guidelines, and LCAP and budget overview documents.

Study Team

This review was conducted by Jason Hasty, Ed.D., School Leaders Advisor, who was responsible for conducting the financial analysis, facilitating interviews, reviewing district documentation, and developing findings and recommendations. District leadership and Business Services staff supported the review by providing financial documents, budget records, and access to fiscal operations personnel.

Key Findings

The review identified five interrelated findings that collectively characterize MUSD's fiscal systems and their operational effectiveness.

- **The District maintains fiscal stability but is on a declining trajectory.** MUSD holds a positive certification, reserves above required minimums, and stable financial projections across reporting periods. However, the multiyear projection reflects ongoing deficit spending supported by reserve drawdown rather than structural alignment of revenues and expenditures. This pattern, if not addressed through deliberate corrective action, will erode long-term financial flexibility.
- **Fiscal systems are well-designed but not consistently executed.** The District has established foundational fiscal structures — Budget Preparation Guidelines, zero-based budgeting elements, LCAP alignment, and interim reporting processes — that are sound in design. However, these systems do not function as a fully integrated operational model. Inconsistent implementation, informal workarounds, and limited cross-departmental coordination create gaps between policy and practice.
- **Position control is not functioning as a unified process.** Staffing decisions are initiated through Human Resources with Fiscal Services frequently informed after decisions have already been made. This lack of real-time coordination prevents accurate alignment among staffing, payroll, and budget, and represents one of the most significant structural risks identified in this review.
- **Purchasing systems are inefficient and drive non-standard practices.** Purchase order processing requires approximately three to four weeks, approval timelines are unpredictable, and internal controls — particularly around petty cash use at school sites — are applied inconsistently. As a result, site and department staff have developed workarounds to meet operational needs, indicating that system inefficiency rather than intentional non-compliance is the primary driver of process breakdowns.
- **Multi-year operational contracts and leases should be reviewed annually** to assess cost containment opportunities, identify potential savings, and avoid duplication of effort. This includes evaluating staffing levels, workload, revenue, and operational costs across support functions, as well as auditing site-level equipment lease agreements for alignment with current utilization and district-wide contract terms.
- **Revenue optimization and long-term cost management opportunities are not being fully pursued.** Facility use fee structures are not clearly established or consistently applied. Attendance systems lack a formal, systematic approach to addressing

absenteeism despite its direct implications for ADA-driven revenue. OPEB is funded on a pay-as-you-go basis without a structured long-term strategy. Special education enrollment has grown from approximately 1,200 to 1,335 students over two years, increasing encroachment on the unrestricted general fund without a corresponding mitigation plan.

Analysis

Financial Analysis Framework

This section presents a structured financial analysis of MUSD's fiscal condition using a sequential review of required state financial reports. The analysis follows the natural progression of financial reporting: Estimated Actuals and Budget Adoption (June), Unaudited Actuals (September), First Interim (December), and Second Interim (March). This structure allows for a clear distinction between what the District expected, what actually occurred, how the District adjusted, and what trends are emerging.

District Context and Operating Environment

MUSD serves approximately 7,100 students across a large, rural geographic area in San Bernardino County. Approximately 73 percent of students are identified as unduplicated pupils — low-income students, English learners, or foster youth. Because the District exceeds the 55 percent unduplicated pupil threshold, it generates supplemental funding for all unduplicated pupils and concentration funding above the 55 percent threshold. In practical terms, MUSD operates within a system where revenue is enhanced due to student need, but flexibility is reduced due to programmatic requirements and higher service costs driven by rural geography, transportation demands, and complex service delivery requirements.

Revenue Structure and Financial Scale

The District operates at an annual scale of approximately $141 million in total revenues, of which approximately $99.7 million is LCFF funding. Within LCFF, nearly $20 million is tied to supplemental and concentration funding. Additional revenue sources include state funding of approximately $23.5 million, federal funding of approximately $8.2 million, and local revenue of approximately $4.5 million. This composition highlights a critical structural reality: MUSD has enhanced revenue levels driven by its high-needs student population, but reduced fiscal flexibility, as funds must be used to increase or improve services for targeted student groups.

Sequential Financial Analysis

The process begins with the Estimated Actuals and Budget Adoption in June, where the District establishes its financial plan for the upcoming year. At the time of adoption, MUSD projected total revenues of approximately $134.1 million, reflecting a deliberate shift away from elevated one-time funding levels toward a more sustainable ongoing revenue structure. The District met all required Criteria and Standards, maintained adequate reserves, and presented a multiyear projection that was balanced on paper. However, several indicators pointed to underlying structural pressures — declining enrollment, the absence of independent position control, unsettled labor agreements, and long-term liabilities including OPEB — suggesting that while the budget was technically balanced, it was built on assumptions that did not yet fully incorporate likely future cost increases.

The Unaudited Actuals confirmed that the District closed 2024–25 in a stronger-than-expected position, with total revenues of approximately $141.8 million, driven largely by higher-than-anticipated federal and local revenues. However, expenditures declined only slightly, with total costs decreasing by approximately 2 percent. Core cost drivers — particularly salaries and benefits — remained stable or increased. This created a critical structural dynamic: while revenues temporarily increased due to one-time funding, the District's underlying cost structure did not adjust downward. The higher revenue level reflected in the Unaudited Actuals represents a temporary peak rather than a sustainable baseline.

The First Interim demonstrated that revenues and expenditures remained largely consistent with the adopted budget, with minimal variance observed. While this level of consistency suggests stability, it also indicates that the District's financial position is being maintained through the continuation of existing assumptions rather than through significant strategic adjustment.

The Second Interim provides the most current view of the District's financial condition. The District continues to maintain a positive certification, with LCFF revenue stable at approximately $99.7 million and unrestricted contributions to restricted programs continuing to increase at a moderate rate of approximately 1.8 percent. The most important insight at this stage is not short-term stability but the emerging long-term trend: the multiyear projection reflects a declining unrestricted fund balance, confirming that the District is engaging in ongoing deficit spending supported by reserves. This pattern is reinforced by persistent risk indicators including declining enrollment, the lack of independent position control, unsettled labor negotiations, and ongoing long-term obligations.

Overall Transition Insight

When viewed collectively, these reports tell a clear and consistent financial story. MUSD is transitioning from a period of elevated, one-time funding to a more constrained, ongoing financial structure. During this transition, core cost structures have remained largely intact, revenues have stabilized, and reserves are being used to maintain balance — resulting in a condition of short-term fiscal stability paired with an emerging long-term structural imbalance requiring deliberate action to ensure sustainability.

ADA, Enrollment, and Revenue Sensitivity

Enrollment decreased from 7,361 to 7,224 students, representing a loss of 137 students, while ADA is projected to remain at approximately 89 percent with minimal assumptions for recovery. Under LCFF, each student generates base funding plus supplemental and concentration funding tied to unduplicated pupil status. As a result, each student loss reduces revenue across multiple layers simultaneously. This creates a structural challenge in which declining enrollment leads to a proportional reduction in funding while the District's obligation to provide services does not decline at the same rate.

Budget Development Process

Budget development begins at the site and department level, where needs are identified and expenditures are proposed. These requests are reviewed and consolidated centrally with input from Business Services, Human Resources, and Educational Services before being presented to the Board of Education for adoption. While the District references a zero-based budgeting approach, its application within a public school system operates within defined legal and programmatic constraints. In this context, zero-based budgeting functions less as a complete reallocation of resources and more as a discipline of justification, alignment, and efficiency — ensuring that expenditures are intentionally reviewed and connected to current priorities rather than simply carried forward.

Interview Findings

A structured leadership interview was conducted on January 27, 2026, with the Director of Fiscal Operations. The interview focused on budget development practices, purchasing workflows, internal controls, position control and staffing alignment, organizational accountability, and emerging fiscal pressures.

A primary takeaway is that many core processes lack clarity, structure, and consistent implementation. The purchasing system emerged as a significant operational bottleneck, with purchase orders requiring approximately three to four weeks to process and no consistent oversight or coordination cadence within purchasing functions. Sites and departments frequently bypass established procedures — rerouting requisitions, using alternative funding sources, or finding informal pathways to complete transactions. Internal controls are applied inconsistently, particularly around petty cash use at high school sites.

The interview confirmed that position control is not functioning as an integrated system. Staffing requests are initiated through Human Resources, with Fiscal Services often informed after decisions have already been made. Financial and operational decisions regarding capital purchases, equipment, and program investments are not consistently guided by formal planning frameworks.

Emerging fiscal pressures identified in the interview include: special education enrollment growth from approximately 1,200 to 1,335 students over two years; underdeveloped attendance systems with no formal approach to addressing absenteeism; facility use fee structures that are not clearly established or publicly communicated; and OPEB currently funded on a pay-as-you-go basis without a structured long-term strategy.

Survey Findings

A districtwide Budget Stabilization Input Survey was administered to site administrators, department leaders, and program managers. The survey consisted of approximately 21 questions combining structured and open-ended responses. Four respondents completed the survey. While limited in number, participants hold key leadership roles directly involved in fiscal operations.

Responses consistently identified the same system-level issues across all question areas: lack of clarity in how processes are defined and communicated; lack of consistency in how systems function across sites and situations; widespread delays and inefficiencies; reliance on workarounds as a norm; and limited transparency in budget and resource decision-making. The most important cross-question finding is that the District's fiscal systems are not failing due to lack of effort — they are underperforming due to lack of clarity, consistency, and efficiency.

Areas of Strength

1. **Fiscal Stability and Positive Certification:** The District maintains positive certification across reporting periods, with balanced projections and adequate reserves. The District is meeting its financial obligations in the near term and operating within required fiscal parameters.

2. **Established Budget Development Framework:** The District has developed clear Budget Preparation Guidelines that outline timelines, roles, and expectations, including elements of zero-based budgeting and alignment with LCAP priorities.
3. **Alignment to High-Need Student Funding:** With approximately 73 percent unduplicated pupils, the District effectively generates significant supplemental and concentration funding, providing additional resources to support high-needs students.
4. **Predictability in Financial Projections:** Financial documents reflect stable assumptions, minimal variance between reporting periods, and consistent projections across years.
5. **Awareness of Key Challenges:** Leadership demonstrates awareness of major issues including enrollment decline, rising special education costs, and the need for system improvements.

Areas for Growth

1. **System Implementation and Consistency:** While systems are well-designed, they are not consistently implemented across the District. Processes vary by department and site, and staff understanding is uneven. The core issue is not system design but implementation fidelity.
2. **Position Control and Staffing Alignment:** Position control is not functioning as an integrated system. Staffing decisions are not consistently aligned with budget development, and Fiscal Services is not always involved in real time. This represents a significant structural risk to financial accuracy and sustainability.
3. **Purchasing Systems and Internal Controls:** Purchasing processes are inefficient, with long approval timelines and inconsistent procedures. This has led to widespread use of workarounds and, in some cases, has compromised compliance.
4. **Process Clarity and Communication:** Staff do not consistently understand how budget, purchasing, and approval processes work. Communication of financial decisions is limited or inconsistent, creating variability, inefficiency, and reduced trust in systems.
5. **Overreliance on Workarounds:** Operational inefficiencies are driving staff to develop informal processes to complete tasks. This is a strong indicator that systems are not functioning effectively in practice.
6. **Limited Integration Across Departments:** There is insufficient alignment between Business Services, Human Resources, Instructional Services, and school sites. Decision-making is not consistently coordinated and the system operates in silos rather than as an integrated structure.

7. **Financial Strategy vs. Financial Stability:** The District's financial approach reflects stability and compliance but limited evidence of a proactive strategy to address future challenges. The District is stable but not yet strategically positioned for long-term sustainability.
8. **Revenue Optimization and Cost Management:** Opportunities exist to improve revenue through facility use fee structures and attendance improvement, and to better manage cost drivers including special education growth and OPEB planning.

Recommendations

1. Establish a formal, standing position control reconciliation process between Business Services and Human Resources, including a defined meeting cadence, shared dashboard, and escalation pathway for staffing decisions that affect budget.
2. Redesign the purchasing and requisition workflow to reduce PO processing time. Define clear approval timelines, communicate them districtwide, and establish accountability for adherence.
3. Formalize and enforce internal controls for petty cash and discretionary spending at all school sites, including pre-approval requirements and periodic audits.
4. Develop and distribute standardized purchasing and budget protocols to all site leaders and department staff, with accompanying training.
5. Establish a formal facility use fee structure that is clearly documented, publicly communicated, and consistently applied across all sites.
6. Work with the Instructional Services team to develop a formal, systematic approach to attendance improvement, including site-level ADA recovery targets, intervention protocols, and monitoring reports.
7. Develop a structured long-term OPEB funding strategy that identifies one-time resources — including potential property sales — for addressing long-term liabilities.
8. Establish a cross-department coordination cadence between Business Services, Human Resources, and Instructional Services, with documented agendas, shared data, and clear decision-making protocols.
9. Conduct a study of the reprographics department for cost neutrality and evaluate existing copier leases to ensure maximization investment return.
10. Develop a multi-year deficit spending reduction plan that explicitly sequences corrective actions across short-term, mid-term, and long-term horizons.
11. Strengthen budget communication to site leaders, including clear documentation of allocation methodologies, budget assumptions, and changes between budget cycles.

Implementation Plan

Short-Term (0–6 Months) — Establish Clarity and Consistency

The priority in this phase is to establish immediate stability in site-level practices by setting clear expectations and consistent processes across all schools. This phase focuses on tightening alignment between school sites and Business Services, ensuring that purchasing, budgeting, and communication protocols are understood and followed with fidelity.

- Promoting adherence to established purchasing and budget protocols, minimizing workarounds and reinforcing consistent system use
- Facilitating budget alignment conversations with Business Services to ensure shared understanding of site allocations, assumptions, and constraints
- Reviewing site-level budgets and spending practices to identify misalignments with district procedures
- Supporting clear communication to site staff regarding purchasing timelines, approvals, and appropriate use of funds including petty cash
- Providing timely feedback to Business Services on process inefficiencies, delays, and areas of confusion

Key deliverables: districtwide deficit spending reduction plan analysis; standardized purchasing and budget protocols finalized and distributed; site-based budget review summaries; completed budget alignment meetings with Business Services for every site; updated purchasing practices in implementation with reduced workarounds; baseline metrics established for PO turnaround time, budget variance, and number of exceptions.

Mid-Term (6–18 Months) — Strengthen Alignment and Coordination

As processes stabilize, the focus shifts to deeper alignment and coordination between school sites and central office functions.

- Supporting alignment of staffing decisions with enrollment trends and budget realities, ensuring site-level decisions reflect fiscal constraints
- Facilitating ongoing coordination with Human Resources and Business Services to improve position control accuracy and staffing alignment
- Analyzing site-level and district-level spending patterns to identify opportunities for more strategic resource allocation
- Reinforcing the reduction of informal or workaround processes by promoting system-based solutions
- Supporting the implementation of improved workflows, including updated purchasing procedures and budget tools

Key deliverables: districtwide deficit spending reduction plan draft; staffing alignment plans by site; position control validation reports reflecting reconciled staffing data; regular cross-department coordination cadence with documented agendas and outcomes; site-level spending analysis reports; documented and updated workflows for purchasing, staffing, and budget processes; reduction in exceptions and workarounds tracked through established metrics.

Long-Term (6–12 Months): Build Strategic Leadership and Sustainability

The long-term phase focuses on embedding fiscal leadership into site-based decision-making and building sustainable, system-wide capacity for strategic planning and continuous improvement.

- Supporting the integration of fiscal planning into site leadership practices, aligning budgets with instructional priorities and student outcomes
- Reinforcing attendance improvement efforts by elevating the connection between ADA and district revenue
- Contributing to long-term planning discussions including staffing models, program sustainability, and resource prioritization
- Promoting the use of data to inform decision-making, including enrollment trends, spending patterns, and program effectiveness
- Facilitating collaboration across sites and departments to share best practices and ensure consistency

Key deliverables: districtwide deficit spending reduction plan execution; site-based fiscal plans aligned to instructional priorities and district goals; multi-year staffing plans for each site; ADA improvement plans and monitoring reports; integrated budget-to-outcomes analysis; data dashboards in use for enrollment trends, ADA, spending patterns, and staffing ratios; long-term resource allocation framework guiding decisions on new program investments, reductions, and program sustainability; evidence of sustained process fidelity across all sites.

Conclusion

This review reflects a comprehensive analysis of MUSD's fiscal systems through financial documents, leadership interviews, and districtwide survey input. The findings consistently demonstrate that while the District maintains fiscal stability and has established foundational structures, its long-term sustainability will depend on strengthening system execution, improving integration, and building organizational alignment.

The phased approach outlined in this report provides a clear and actionable path forward. In the short term, the focus is on stabilizing processes and establishing clarity and consistency across all sites. In the mid-term, the work evolves toward deeper alignment and coordination between sites and central office functions, particularly in staffing and resource allocation. In the long term, the emphasis shifts to embedding fiscal leadership into site-based decision-making and building a sustainable, strategic framework for ongoing planning and continuous improvement.

The District has the foundational elements required to make this progress — established processes, compliant reporting, engaged leadership, and organizational awareness of the challenges ahead. The work ahead is one of execution, integration, and sustained discipline in service of long-term financial stability and student outcomes.

Instructional Services Review

Executive Summary

This review of the Instructional Services Division was conducted to assess organizational coherence, operational efficiency, and alignment to the District's mission and goals, and to develop actionable recommendations as part of MUSD's Budget Stabilization Plan. The District's mission — to ensure all students have a comprehensive, high-quality education that empowers them with twenty-first-century skills — is being undermined not by lack of effort or commitment, but by structural overload, fragmented systems leadership, and organizational incoherence.

MUSD enters this review with meaningful assets. CTE and dual enrollment participation is growing, school climate perceptions from stakeholders are positive, investment in MTSS and intervention staff has been made, community schools infrastructure is in place, and a large untapped homeschool market exists within district boundaries. These represent genuine and actionable strengths.

At the same time, the District faces significant structural challenges. Enrollment has declined from 8,437 to approximately 7,305 students and is projected to fall to 6,580 — a loss of more than 22 percent from peak. Chronic absenteeism stands at 26.6 percent, above the state average. The Instructional Services structure operates with fragmented role ownership and unclear accountability. Special education identification has risen above 18 percent. Facility utilization is approximately 56 percent and declining.

The central conclusion of this review is that MUSD's core challenge is not a lack of programs or personnel. Critical roles are compressed into too few leaders, key functions lack dedicated ownership, and the system relies on individual effort rather than coherent infrastructure. The current structure produces underperformance even with strong, committed staff.

The five strategic priorities that organize the recommendations in this report are: build coherence in Instructional Services; implement a high-functioning MTSS system; establish a districtwide attendance recovery system; stabilize enrollment and grow programs; and align staffing and reduce structural costs.

Background and Scope

This review was conducted as part of MUSD's broader Budget Stabilization engagement. The Instructional Services Division review was designed to evaluate organizational coherence, operational efficiency, staffing alignment, and programmatic effectiveness in relation to the District's enrollment trajectory, fiscal constraints, and student outcome goals. Findings and recommendations were developed through interviews with district and site leadership, artifact review, site observations, and analysis of enrollment, attendance, staffing, and financial data.

Study Team

This review was prepared by Stella Kemp, Ed.D., Program Manager at School Leaders, and Jason Viloria, Ed.D., in April 2026 as part of the District's Budget Stabilization engagement.

Key Findings

Six findings emerged from interviews, artifact review, site observations, and data analysis. Each finding includes observed evidence and projected fiscal and operational impact.

Finding 1: Lack of Coherent Instructional Services Structure
Observed Evidence

- The IS division operates in functional silos with unclear ownership and overlapping director portfolios.
- MTSS, assessment, professional learning, and student support are each fragmented across multiple leaders.
- The Director of Instructional Programs and Support (Equity) role combines secondary instruction, CTE, discipline, attendance, and SARB — portfolios that in well-functioning systems each require dedicated leadership.
- No consistent accountability structure or shared instructional vision exists across departments.
- Special Education Department / SELPA, with responsibility for student support and Instructional Services with oversight of MTSS systems lack alignment

Fiscal and Operational Impact

- Inefficient use of staff time due to role ambiguity and triage-driven decision-making.
- Inability to scale high-value initiatives such as STEAM Labs and MTSS districtwide.
- Structural overload guarantees underperformance even with capable personnel.

Finding 2: Ineffective MTSS Implementation Driving Costs
Observed Evidence

- MTSS coordinators are used inconsistently across sites and are frequently reassigned to administrative duties.

- No standardized pre-referral system, behavioral framework, or districtwide screener exists.
- PBIS has not been fully implemented districtwide, leaving classroom management without a consistent support structure.
- Special education identification has risen to 18 percent or above without clear upstream intervention alignment.

Fiscal and Operational Impact

- Over-referral to high-cost special education services that could be avoided with strong Tier 2/3 support.
- Redundant and inefficient intervention staffing consuming budget without clear return on investment.
- Possible contribution to teacher burnout and turnover due to unaddressed behavioral challenges.

Finding 3: Chronic Absenteeism and Weak Attendance Systems

Observed Evidence

- Chronic absenteeism remains at 26.6 percent — significantly above state averages — despite prior improvement efforts.
- The District is beginning to target students with 5–9 percent absences, which is directionally correct but lacks a tiered, systemic structure.
- No dedicated Attendance Coordinator role exists; attendance is one of many responsibilities spread across overburdened directors.
- Attendance interventions are reactive rather than preventive, with no integration into the MTSS framework.

Fiscal and Operational Impact

- Every 1 percent ADA recovery translates directly to meaningful LCFF revenue — the current gap represents significant ongoing annual loss.
- A 2–5 percent ADA improvement is achievable with a systemic, tiered attendance recovery model.
- Low attendance correlates directly with lower academic achievement and higher intervention costs.

Finding 4: Declining Enrollment and Underutilized Capacity

Observed Evidence

- Enrollment has declined from 8,437 to approximately 7,305 students and is projected to fall to 6,580 — a loss of more than 22 percent from peak.
- Facility utilization is approximately 56 percent and projected to decline to 50 percent, creating unsustainable fixed overhead.

- No coordinated enrollment recovery strategy exists; homeschool and private school populations within district boundaries remain largely unrecaptured.
- Fee-based preschool and early childhood pipeline opportunities are underdeveloped despite available infrastructure.
- Multiple elementary campuses operate multi-year combo classes, possibly impacting teacher efficacy and student achievement.

Fiscal and Operational Impact

- Structural deficit driven by excess facility and staffing capacity not aligned to current enrollment.
- Urgent need for facility consolidation — every year of delay increases costs and deepens the structural deficit.

Finding 5: Underdeveloped Enrollment Growth Strategy

Observed Evidence

- A large homeschooling and private religious school community exists within district boundaries — many of these students could be recaptured with the right programs and outreach.
- The Independent Study program is underdeveloped and not positioned as a high-quality alternative to traditional schooling.
- No marketing strategy, differentiated program identity, or designated ownership of enrollment recovery has been established.
- The military community (Marine base families) represents a stable enrollment pipeline that is currently undertapped.

Fiscal and Operational Impact

- Significant LCFF revenue opportunity exists within current district boundaries without recruiting any students from outside the District.
- Expanding Independent Study with the right model could simultaneously stabilize enrollment decline and generate additional per-pupil revenue.

Analysis

Organizational Structure Analysis

The Instructional Services Division is currently organized under two parallel Assistant Superintendent roles — Elementary Education and Secondary Education — with three supporting directors and multiple layers of TOSAs, coaches, and coordinators.

Strengths of the Current Structure

- Grade-span expertise allows for specialized focus on developmental instructional needs at the elementary and secondary levels.

- Director roles collectively address all essential instructional areas, ensuring no major function is entirely unassigned.
- Strong investment in support roles — literacy coaches, TOSAs, MTSS coordinators — reflects alignment with LCAP priorities.
- Emerging cross-functional connections between MTSS, SEL, and attendance provide a foundation for future system integration.

Critical Structural Weaknesses

1. The Dual Assistant Superintendent Model Creates Silos. The Elementary vs. Secondary split reinforces parallel and often inconsistent systems. Directors must navigate two leadership structures, and no single instructional leader is accountable for TK–12 outcomes. Students experience inconsistent systems as they transition across grade spans.
2. Director Roles Are Critically Overextended. Each director oversees too many unrelated functions. The Director of Instructional Programs manages attendance, discipline, MTSS, community schools, scheduling, and parent engagement simultaneously. The Director of Professional Learning also oversees EdTech, TK, GATE, STEAM, curriculum adoption, and ELOP. The outcome is shallow, reactive leadership with no capacity for strategic depth in any area.
3. MTSS Has No Single Accountable Owner. MTSS responsibilities are distributed across multiple directors, creating confusion and inconsistency at the site level. Coordinators lack clear expectations and are frequently pulled into administrative functions. MTSS currently functions as a staffing structure, not an instructional system.
4. Structure Is Program-Centered, Not Outcome-Centered. The organization is designed around managing programs rather than around driving measurable student outcomes. This makes accountability for results difficult and limits the District's ability to prioritize high-impact work.

The District does not have a staffing shortage. It has a structure problem. Too many responsibilities are concentrated in too few roles. Too many initiatives exist without system ownership. Too much site-level variation exists without district coherence.

Recommended Structural Options

Three structural options are presented. Option 1 is the recommended path based on the District's fiscal realities and need for coherence.

Option	Structure
Option 1 *(Recommended)*	Single Assistant Superintendent of Instruction (TK-12) with four - five functionally-aligned directors.
Option 2	Dual AS model redefined by function: Teaching & Learning and Student Support & Systems (TK-12 each)

Option 3	Hybrid: One AS leads TK-12 Instruction; one AS leads Operational Systems (MTSS, attendance, data) including special education.

Regardless of the AS model selected, the following director-level structure is recommended to eliminate overlap and create clear outcome ownership:

- Director of Teaching and Learning — curriculum, professional development, instructional coaching, assessment alignment
- Director of MTSS and Student Support — MTSS academic and behavioral, attendance, SEL/PBIS, intervention systems, Section 504, nurses
- Director of Innovation and Programs — CTE, dual enrollment, STEAM, ELD, grants including ELOP
- Director of Data, Assessment and Accountability — data systems, dashboards, program evaluation, compliance
- SELPA Director - special education programming, MediCal billing

Recommendations

Short-Term (0–6 Months)

1. Create Dedicated System Leadership Roles. Establish or assign the following positions immediately to decompress overburdened roles and establish dedicated ownership of the District's highest-leverage systems.

Role	Responsibilities & Strategic Rationale
Director/Coordinator of Attendance & Engagement	Owns attendance, SARB, Saturday school, and IS attendance systems. ROI justification: even a +1% ADA increase generates LCFF revenue sufficient to cover the cost of the position.
PBIS / Behavior Systems Coordinator	Leads districtwide Tier 1-3 behavior system and teacher coaching. Directly impacts suspension rates, teacher retention, and student engagement.
Math TOSA (K-12 Articulation)	Bridges the identified gap in math articulation between elementary and secondary. Supports coherent instructional improvement, which directly impacts assessment scores and LCFF accountability metrics.

2. Formalize the Attendance Recovery System. Build on the District's emerging bubble student initiative and scale it into a full districtwide tiered system. Implement weekly data cycles at the site and district level with standardized dashboards. Establish standard intervention protocols: 5–9 percent absence rate = targeted outreach; 10–19 percent = contracts and parent meetings; 20 percent or above = intensive interventions, home visits, and SARB referral. Activate the planned text messaging system for absence notification paired with positive attendance incentive campaigns. Set a districtwide goal of +2–3 percent ADA recovery within 12 months.

3. Redefine and Protect MTSS Roles. MTSS coordinators must be formally protected from assignment to assistant principal duties or other administrative functions.

Establish standardized meeting protocols, intervention tier definitions, and consistent data tracking systems across all sites. The goal is to transform MTSS from a staffing structure into a functioning instructional system.

4. Freeze Non-Essential Hiring and Conduct a Position Control Audit. Implement an immediate freeze on non-essential hiring and conduct a comprehensive audit of all existing positions. Identify redundant roles — particularly at the site level — to inform near-term realignment decisions and provide the board with a clear view of the organization's true cost structure.

5. Launch Homeschool and Independent Study Recovery Initiative. Assign a dedicated lead to this enrollment recovery effort. Develop a flexible hybrid model that includes enrichment programming and extracurricular access to attract families currently using non-MUSD options. Launch targeted outreach to homeschool networks and faith-based communities within district boundaries.

Mid-Term (6–18 Months)

1. Full MTSS System Implementation. Complete the buildout of an integrated MTSS system with aligned academic, behavioral, and attendance supports across all three tiers. Expected outcomes include a measurable reduction in special education over-referral and elimination of redundant intervention staffing.
2. Program-Based Enrollment Strategy. Conduct feasibility study to assess desirability for specialized school pathways to differentiate MUSD's program offerings and recapture students who have left for alternatives, including STEM/STEAM academies, dual language immersion expansion, CTE pathway hubs, and an Independent Study Academy positioned as a high-quality flagship program.
3. Early Childhood Expansion. Conduct feasibility study for a fee-based preschool program that builds a pipeline into TK/K, targeting working families and the military community. This initiative generates direct revenue and stabilizes future K–12 enrollment.

Long-Term (18+ Months)

1. Coherent Instructional System. Develop a districtwide instructional framework, including vision for teaching and learning and learner profile that guides teaching and program decisions across all grade levels, providing the foundation for the Morongo Unified Vision and strategic framework.
2. Technology and Operational Efficiency. Transition to a full 1:1 device model, implement a technology refresh cycle using a leasing model, and develop a comprehensive process for selecting, monitoring, and auditing educational technology applications.

Implementation Plan

The following phased implementation plan outlines specific actions and expected outcomes across four internal stages.

Short-Term (0–6 Months) — Stabilization and Structural Realignment

Stage 1 — Stabilization (0–3 Months): Adopt the MTSS handbook and train all principals and MTSS leads. Hire or assign a dedicated Attendance Lead. Define clear functional responsibilities for all directors. Launch the homeschool and Independent Study outreach initiative. Conduct a comprehensive position control audit. Establish a universal screening schedule. Freeze non-essential hiring.

Expected outcomes: MTSS coordinators reassigned to defined roles; attendance recovery work begins with data tracking infrastructure in place; position control audit provides the board with a full cost picture.

Stage 2 — Structural Realignment (3–6 Months): Transition to the unified IS model or modified dual model. Redefine director roles to eliminate overlap. Launch Tier I and Tier II MTSS with fidelity. Add PBIS Coordinator and Math TOSA. Begin IS restructuring design process with the board. Formalize tiered attendance intervention protocols.

Expected outcomes: potential reduction of one AS position if the unified model is adopted; consolidation of duplicative program roles; attendance data cycles underway with early ADA recovery measurable.

Mid-Term (6–18 Months) — System Implementation

Complete full Tier III MTSS implementation. Standardize the SST process districtwide. Develop and initiate the school consolidation plan. Launch specialized program pathways including STEM, CTE, and dual language. Launch fee-based preschool and early childhood program. Expand Independent Study as a flagship program.

Expected outcomes: measurable reduction in special education over-identification; shift from program-based to system-based staffing; enrollment stabilization initiatives producing results; school consolidation savings beginning to materialize.

Long-Term (18+ Months) — Optimization

Implement zero-based budgeting systemwide. Develop a districtwide instructional framework and learner profile. Launch 1:1 technology model with leasing refresh cycle. Expand grant-funded partnerships. Adopt and operationalize Vision, learner portraits and strategic framework. Conduct annual strategy and budget alignment reviews.

Expected outcomes: multi-year balanced budget aligned to strategic priorities; annual public State of the District reporting tied to vision metrics; reduced expenditures with improved outcomes at scale; institutionalized planning and budgeting processes.

Immediate 90-Day Board-Level Priorities

1. Hire or assign an Attendance Lead with full system ownership and accountability.
2. Protect and redefine MTSS coordinator roles — formally remove from administrative duties.
3. Launch Independent Study expansion plan with a dedicated program lead.
4. Add PBIS Coordinator and Math TOSA to address identified instructional gaps.

5. Begin IS restructuring design process — present options to the board within 60 days.

Conclusion

MUSD has the foundational elements for a successful, student-centered organization. The mission is clear, the community is engaged, and meaningful investments have been made in staff, programs, and infrastructure. The challenge is not one of capability — it is one of structure and coherence.

> The most significant barrier to student success, fiscal sustainability, and organizational effectiveness in MUSD is not who is in the building — it is how roles are organized, aligned, and held accountable for outcomes.

By restructuring Instructional Services, implementing a true MTSS framework, addressing attendance systematically, and managing enrollment decline strategically, the District can reduce unnecessary expenditures, increase LCFF revenue, improve student outcomes, and stabilize its long-term operational and financial position.

Expected Outcomes of Full Implementation

- Reduced unnecessary special education expenditures through upstream intervention alignment
- Increased LCFF revenue through measurable ADA improvement (target: +2–5 percent)
- Enrollment stabilization through program differentiation and recovery initiatives
- Structural deficit reduction through facility consolidation and zero-based budgeting
- Improved student academic and behavioral outcomes tied to a coherent instructional system
- Stronger community trust through transparency, consistent communication, and visible results

The success of every recommendation in this report depends on consistent, sustained leadership from the Superintendent, Cabinet, and Board of Education. The willingness to make difficult structural decisions, enforce alignment discipline, and maintain strategic focus over multiple years will determine whether MUSD emerges from this inflection point in a stronger position.

Special Education Review

Executive Summary

This review of MUSD's special education programs was conducted as part of the District's Budget Stabilization Plan. The review assessed pre-referral systems, staffing and caseloads, program continuum and least restrictive environment placements, central office organizational structure, legal expenditures and dispute trends, and non-public school placement practices.

The District's special education program demonstrates meaningful areas of strength. Staff commitment is high, with employees expressing a deep connection to their community and a strong desire to serve all students. The Department has made notable progress in expanding inclusive practices, developing the PLUS Program as a district-based alternative to non-public school placement, implementing the SCIA assessment process, and reducing residential placements from an average of five per year to zero. Dispute resolution trends are positive — the District has not participated in any due process hearings in the past five years, and the number of settlements and associated costs have declined significantly since 2021–22.

At the same time, the review identifies several areas requiring corrective action with direct fiscal implications. The District's special education identification rate of 18 percent is significantly above the county average of 13 percent and the state average. This over-identification is closely linked to underdeveloped pre-referral systems, inconsistent MTSS implementation, and limited use of Section 504 — only 2.1 percent of students hold 504 plans, a distribution significantly outside typical state and national patterns. Over-identification drives elevated staffing and service demands, increasing encroachment on the unrestricted general fund.

Related service provider staffing presents compliance risks in several areas. Speech and Language Pathologist caseloads average 64 students per provider against a statutory maximum of 55. School nurse staffing is below industry-standard recommendations despite a growing population of students with complex medical needs. Occupational Therapy services are delivered entirely through a non-public agency contract at a cost of $800,000 annually, warranting a formal cost-benefit analysis of transitioning to an in-house model.

The SELPA Director role carries responsibilities significantly beyond the traditional scope of special education leadership — including Section 504 oversight, literacy including dyslexia, nursing, and mental health services — a scope the review concludes is not

sustainable over an extended period. Addressing structural overload at the leadership level is a prerequisite for the system improvements recommended in this report.

The recommendations that follow are organized by the six areas reviewed and are designed to reduce unnecessary special education expenditures, improve compliance, strengthen pre-referral systems, and align staffing with actual student needs.

Noteworthy Accomplishments

The following Department accomplishments are recognized prior to the findings and recommendations.

- **Expanded Inclusive Practices.** Implementation and growth of the Special Olympics Unified Champion Schools programs at both high schools and one middle school, strengthening inclusive culture and peer engagement.
- **IA Handbook.** Developed, distributed, and trained instructional assistants on the updated IA Handbook.
- **Family Support Ambassador Program.** Established and coordinated the Family Support Ambassador initiative to enhance communication, guidance, and partnership with families navigating special education services.
- **SCIA Assessment Protocols.** Implemented consistent SCIA assessment protocols to ensure equitable, data-driven decision-making across school sites.
- **UDL Spotlight.** Launched and supported a UDL initiative at Twentynine Palms Junior High to model accessible instructional practices and build teacher capacity, with expansion in 2025–26 to include Condor, Landers, and Palm Vista Elementary Schools.
- **Special Education Program Assessment Process.** Introduced and trained principals on the Program Assessment Tool, enabling site leaders to evaluate program effectiveness and identify targeted areas for improvement.
- **Alternative Behavior Program.** Developed and launched the district-based PLUS Program to address the absence of a local non-public school placement option for students with the most significant behavioral needs. Since implementation, the District has reduced residential placements from an average of five per year to zero.
- **Updated Procedural Handbook.** Revised and updated the District's Special Education Procedural Handbook to ensure clarity, compliance, and consistent implementation across all sites.

Background and Scope

This review was conducted as part of the District's Budget Stabilization engagement. The Special Education review assessed the District's special education programs, including pre-referral systems, across six areas: special education enrollment, identification, and MTSS implementation; staffing and caseloads for related service providers and paraeducators; the continuum of special education and related service options including least restrictive environment placements; the Special Education Department's central office organizational structure; legal expenditures and dispute trends; and non-public school placement practices.

The review included site visits on January 7, January 27, and February 18, 2026, with interviews conducted with central office and school administrators, special education teachers, related service providers, special education instructional assistants, and other staff. Additional meetings were held via Google Meet, and supplementary communication occurred via phone and email with various staff members across departments.

Study Team

This review was conducted by Irene White, Special Education Consultant, School Leaders, who was responsible for site visits, interviews, document review, data analysis, and development of findings and recommendations.

Key Findings

Six areas were reviewed. The findings from each area are summarized below and examined in detail in the Analysis section.

- **Area A — Enrollment, Identification, and MTSS.** The District's special education identification rate of 18 percent is significantly above county and state averages. Over-identification is linked to underdeveloped pre-referral systems and inconsistent MTSS and PBIS implementation. Section 504 utilization at 2.1 percent is significantly below typical patterns, indicating that students who could be served through accommodations are being routed into special education.
- **Area B — Staffing and Caseloads.** Instructional assistant and behavior technician staffing generally aligns with industry standards, but heavy reliance on three-hour part-time positions creates a revolving-door dynamic with high resignation rates, ongoing recruitment costs, and disruption to service continuity. SLP caseloads average 64 students per provider, above the statutory maximum of 55. The District relies on non-public agency contracts for Occupational Therapy ($800,000 annually) and Physical Therapy. Nurse staffing is below industry-standard recommendations.

- **Area C — Continuum of Services and LRE.** The District provides a full continuum of special education programs and services. School-age LRE targets are met. Preschool LRE targets are not met across all three indicators. The District's three-hour preschool program structure is inconsistent with research-based recommendations for early childhood special education.
- **Area D — Organizational Structure.** Central office staffing levels are generally appropriate for the size of the special education population, but the SELPA Director role carries an unsustainable breadth of responsibilities extending well beyond the traditional scope of special education leadership.
- **Area E — Legal Expenditures and Dispute Trends.** Dispute resolution trends are positive. The District has not participated in any due process hearings in the past five years. Settlements and associated costs have declined significantly since the post-COVID peak in 2021–22. Special Services staff currently lack access to detailed budget information, limiting strategic fiscal planning.
- **Area F — Non-Public School Placements.** There are currently no students placed in a non-public school. One student is under consideration for a potential residential placement. The District's PLUS Program has successfully eliminated residential placements by providing an intensive district-based alternative.
- **Area G — Transportation Cost Misallocation.** Student transportation costs for students eligible for special education are currently charged entirely to the special education budget rather than allocating only the costs of specialized transportation to special education. This misallocation is affecting the District's ability to pass mandated financial reports including the SMA and SMB, and must be corrected to accurately reflect special education expenditures and ensure compliance.

Analysis

Area A: Special Education Enrollment, Identification, and MTSS

DataQuest shows that both MUSD's census-day enrollment and its special education enrollment have declined over the past five years. Currently, 18 percent of TK–12 students are identified for special education — significantly higher than the county and state averages of 13 percent. Identification rates vary widely across the District, with some sites reaching 23 percent while others align more closely with statewide norms.

Students receiving special education services are represented across all state disability categories, with most categories mirroring statewide averages. Notable exceptions include Specific Learning Disability and Autism. Between 2020–21 and 2025–26, the number of students identified with Autism increased from 156 to 276 — a significant rise. Students with Autism now represent 21 percent of the District's special education population, compared to 17 percent statewide. During the same period, students identified with Speech and Language Impairments declined from 243 to 180, suggesting some students may have been reclassified under Autism, as the District's Speech and Language percentage has dropped to just under 14 percent, below the statewide average of 20 percent. Students identified with Specific Learning Disability comprise 41 percent of the District's special education population, above the statewide average of 32 percent.

English learners represent only 3.7 percent of students within the District and are appropriately represented in the District's special education program. The SELPA Director monitors this data to ensure the District identifies all qualifying students with disabilities.

Special education staff are allocating considerable time to assessments, despite roughly 20–25 percent of students being found ineligible, reflecting an inefficient use of resources driven by an underdeveloped pre-referral process.

The District's identification patterns are closely tied to the effectiveness of its Student Study Teams and MTSS framework. The MTSS framework is widely described by administrative and support staff as antiquated and inconsistently implemented. Despite staffing one MTSS Lead FTE per site at some sites also receiving a 1 FTE Instructional Assistant, administrative staff report that the District is still working to establish clear expectations for site-level roles, responsibilities, and deliverables. Staff adherence to defined duties has been inconsistent, and site-level personnel frequently report that expectations are unclear and that the systems, tools, and training necessary to build a comprehensive MTSS and PBIS program have not been provided at the depth required.

PBIS is implemented unevenly across the District. Many sites report insufficient coaching or structured training to build a sustainable PBIS culture. Without districtwide clarity on core components — behavior matrices, reinforcement systems, data collection protocols, and Tier 2 and 3 intervention pathways — PBIS cannot function as intended. This inconsistency undermines student behavioral outcomes and weakens the District's ability to use PBIS data to inform SST decisions and prevent unnecessary referrals for special education evaluation.

The District's data show that 18 percent of students are identified for special education while only 2.1 percent hold Section 504 plans — a distribution significantly outside typical state and national patterns. This indicates that general education supports and accommodations are not being fully implemented and that students who could succeed with accommodations alone may be routed prematurely into special education evaluation or placement. This pattern results in over-identification in special education, increased strain on special education staffing and resources, compliance considerations, and elevated costs for special education staffing including administrative support.

The District has an SST process; however, it is not consistently utilized across all sites as intended. All staff interviewed identified the lack of pre-referral interventions as a primary reason for the District's identification rate exceeding state and county averages. A full site-by-site review of pre-referral processes and MTSS structures was outside the scope of this engagement; however, some sites are beginning to review achievement data more systematically and provide targeted interventions for students showing emerging learning gaps.

Education Code 56303 states that a student shall be referred for special education instruction and services only after the resources of the regular education program have been considered and, where appropriate, utilized. Identifying a student for special education before implementing general education interventions does not best serve the student and is more costly than serving students through interventions and general education supports.

California's MTSS framework focuses on aligning initiatives, supports, and resources with content standards to meet the needs of all students. This integrated framework aligns academic, behavioral, and social-emotional learning and uses data collected through universal screening to support decision-making and problem-solving. The District has developed an MTSS Request for Assistance process; however, it lacks a clearly defined framework. A comprehensive MTSS handbook would help establish consistent expectations for Tier 1 instruction and clarify how the District uses universal screeners, formative assessments, and progress-monitoring tools to support student success across three tiers: Tier 1 Enrichment and Core Support, Tier 2 Targeted Small-Group Instruction, and Tier 3 Intensive Individualized Intervention.

Currently, 70 percent of students are not meeting grade-level standards in Math and 65 percent are not meeting standards in English Language Arts. Moving toward full districtwide MTSS implementation will be essential to addressing these challenges and reducing inappropriate special education identification over time.

Area B: Staffing and Caseloads

Special Education Teacher Staffing

A comparative review of the District's special education teacher staffing against statewide guidelines and industry standards was conducted. The District has shifted its service delivery model for students eligible for special education with mild to moderate impairments, implementing the Learning Center model in 2018 under the current SELPA Director's leadership. Under this model, Mild-Moderate self-contained classrooms were closed and replaced with Specialized Academic Instruction delivered through push-in and pull-out services. The negotiated collective bargaining agreement sets the caseload maximum at 28 consistent with Education Code 56362(c), though the Learning Center model requires more intensive service delivery than the previous RSP structure.

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SAI Teacher Staffing[3]

School Level	Caseload Average	Standard Staffing Above (+) or Below (-) Ed. Code
Elementary	32	Above
Middle	28.8	Above
High School	26.47	Slightly Below

It is important to note that students who receive SAI support are not neatly distributed into groups of 28 across district schools, and maintaining more staffing than the minimum benchmark may be necessary. In addition, the standard outlined in EC 56362(c) is based on a maximum caseload higher than the statewide average observed in LEAs serving students using an inclusive model. For SAI programs supporting students in their Least Restrictive Environment, the industry standard typically ranges from 20 to 24 students per special education teacher. Current caseloads across all programs exceed these recommended thresholds, suggesting a potential need for additional SAI support at the elementary and middle school levels.

This finding should be approached with caution within the broader context of this report. A primary District priority remains the reduction of overall special education identification through the enhancement of pre-referral systems. Strengthening these structures may naturally alleviate caseload pressures over time, potentially reducing the need for additional staffing.

District Caseload Sizes for Special Day Class/ ESN Programs

School Level	Program Type	Caseload Average	Additional Notes
Pre School/ Early Childhood Program (ECP)	Cross-categorical Special Day Class Program	14.5	The district currently has 2 teachers who run am and pm programs so students are split among 4 classes.

[3] District-provided data and EC 56362(c).

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School Level	Program Type	Caseload Average	Additional Notes
Elementary	Cross Categorical SDC (Extensive Support Needs	13.72	The district currently has one Autism Specific Classroom with 8 Students and 2 other non categorical classrooms with 17 students.
	ED Program - Comprehensive Schools	12	
	PLUS / Therapeutic Special Day Class – Mental Health and Behavioral Support Needs	14	
Middle	Extensive Support Needs Special Day Class – Noncategorical	12.5	One classroom has 17 students the other has 8
	ED Comprehensive Program	13	
	PLUS /Therapeutic Special Day Class – Mental Health and Behavioral Support Needs	15	Students are in grade 7 - 10.
High School	Cross Categorical SDC (Extensive Support Needs	13.6	
	ED Comprehensive Program	15	

The District currently allocates 2.0 FTE teachers to the preschool cross-categorical SDC program operating across Joshua Tree Elementary and Oasis Elementary. Each teacher is responsible for approximately 14 students, which falls within typical industry-standard ratios for preschool special education programs. However, the District should evaluate the feasibility of transitioning to a full-day program model. The current three-hour program structure is significantly shorter than what is commonly offered in high-quality, evidence-based early childhood programs.

For Moderate to Severe Extensive Support Needs programs, the District maintains 19.0 FTE SDC teachers, resulting in a district-wide average of 13.2 students per teacher. However, two classrooms are currently operating with 17 students each, substantially exceeding the district mean. These classrooms also encompass an expansive grade span from Transitional Kindergarten through 5th grade, posing significant challenges to curriculum alignment and individualized program delivery. Addition of one FTE teacher is recommended to reduce volume in the most impacted classrooms and narrow grade-level spans.

The District currently has 4.0 FTE SDC teachers for students with emotional disabilities, with an average caseload of 13.75 students per teacher. The District currently has 2.0 FTE SDC teachers for therapeutic classes serving students with social-emotional and behavioral support needs, averaging 14.5 students per teacher.

Important Note on Evolving State Guidance
Under Assembly Bill 560, the State Superintendent of Public Instruction is required to develop and publish recommended maximum adult-to-pupil staffing ratios for special education classes. These recommendations are due to the Legislature by April 1, 2027, and must be posted on the California Department of Education website by July 1, 2027. As a result, beyond the Resource Specialist Program caseload cap, many current staffing ratios are established at the Special Education Local Plan Area (SELPA) level and function as guidelines rather than uniformly enforceable statewide maximums. Formal statewide standards for most program types remain under development.

Resource Specialist Program (RSP)
In accordance with California Education Code § 56362(c), caseloads for Resource Specialists shall not exceed 28 students. If this maximum is exceeded, the District must obtain a state waiver. Additionally, SELPA policies require that at least 80% of Resource Specialists within a Local Plan be supported by an instructional aide.

Special Day Classes — Mild to Moderate Disabilities
For grades K–8, mild/moderate Special Day Class caseloads should average 20 students, with a maximum of 21. At the high school level, caseloads should similarly average 20 students and not exceed 21. These ratios are generally established through SELPA guidelines rather than a single uniform Education Code provision.

Special Day Classes — Moderate to Severe Disabilities
For grades K–8, moderate/severe Special Day Class caseloads should average 10 students, with a maximum of 11. For students with severe disabilities, California Education Code § 56360.1 establishes a maximum class size of 8 students.

Preschool / Early Childhood
For preschool programs serving mild/moderate disabilities, caseloads should not exceed 15 students under applicable SELPA guidelines. For children ages 3–5 with severe disabilities, instructional adult-to-child ratios should not exceed 1:5, consistent with early childhood special education program standards.

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Special Education Instructional Assistant Staffing

Special education instructional assistants — also referred to as paraeducators — are trained professionals who support students with disabilities under the direction of a classroom teacher. The District currently employs Behavior Instructional Assistants, Instructional Assistants Mild/Moderate, and Instructional Assistants Moderate/Severe.

Instructional Assistant and Behavior Technician Allocation[4]

School Site	Program	# of IA by type	Above (+) or Below (-) Industry Standard	Additional Notes
CES	1 **MM** (25 students)	1 - 6.0 hour 1 - 3.0 hour	At Standard	**MM** - Gave additional 3 hr IA support to assist with Mod students in caseload.
	1 **ESN** (14 students)	1 - 6.0 hour (filled) 2 - 3.0 hour (vacant)	Below Standard	Removing the 2 students with SCIA… they are staffed at a 3:12 or 1:4 ratio. (all ASD class)
FHES	1 **MM**	2 - 3.0 hour	At Standard	
JTES	1 **Pre K**	2 - 6.0 hour	No Standard for Pre K	
	1 **MM**	1 - 6.0 hour 1 - 3.0 hour		**MM** - Gave additional 3 hr IA support to assist with Mod students on caseload
LES	1 **MM**	3 - 3.0 hour	Over	Waiting for a vacancy in a 3 hr to abolish
MVES	1 **ESN**	1- 6.0 hour 2 - 3.0 hour (vacant)	At Standard	**ESN** is at a 1:3 ratio
	1 **MM**	3 - 3.0 hour	Over	**MM** - Waiting for vacancy in 3 hr to abolish
OES	1 **Pre K FTE**	1 - 6.0 hour 2 - 3.0 hour (1 - 3 vacant)	At Standard	12 students - 3 have SCIA. so 1:3 ratio
	1.5 MM FTE	1 - 6.0 hour 3 - 3.0 hour	At Standard	The "extra" 3 hours is to support students because we are over caseloads. The 1 FTE MM teacher has a caseload of 40 while the .5 FTE has a caseload of 14.

[4] Not including Special Circumstance Instructional Aides (SCIA) – District Compared to Industry Standards.

Source: Industry standards and district-reported data.

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School Site	Program	# of IA by type	Above (+) or Below (-) Industry Standard	Additional Notes
	2 FTE ESN	2 - 6.0 hour 4 - 3.0 hour	At (Ratio after pulling out SCIA student/staff is 1:3.8)	
ONES	2.5 FTE MM	1 - 6.0 hour 5 - 3.0 hour	At	
	2 FTE ESN	4 - 6.0 hour 1 - 3.0 hour	Ratio is 1:3.3	
PVES	1 FTE MM	3 - 3.0 hour	At	MM - Gave additional 3 hr IA support to assist with Mod students on caseload
	2 FTE ESN	2 - 6.0 hour 6 - 3.0 hour	Under	Staffing Ratio after pulling out SCIA student/staff is 1:3.9)
TPES	1.5 FTE MM	1 - 6.0 hour 1 - 3.5 hour		The 1 FTE MM has a caseload of 31 where the .5 FTE has 15. The additional 3.5 hr IA is to help with the overage of students on caseload.
	1 FTE ED Teacher	2 - 6.0 hour 1 - 3.0 hour	ED Class Ratio 1:3.4	
	1 FTE DHH Teacher	No IA Support needed at this time per teacher - previous IA retired so we are holding the position until a need arises.		
YMES	2 FTE MM	4 - 3.0 hour	At	
	2 FTE ESN	4 - 6.0 hour 2 - 3.75 hour 2 - 3.0 hour	Ratio 1:2.5	1 - FTE ESN Teacher Died this year - providing additional IA support to the program for stability. Have had lots of long term subs.
YVES	1.5 FTE MM Teacher	4 - 3.0 hour		MM program has had an average of 48 students

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School Site	Program	# of IA by type	Above (+) or Below (-) Industry Standard	Additional Notes
	(.5 FTE has been vacant most of the year)			every month this school year. By herself!
	2 FTE ESN	2 - 6.0 hour 4 - 3.0 hour	Ratio 1: 3.8	
LC Middle School	3 FTE MM	6 - 3.0 hour		
	1 FTE ESN	1 - 7.0 hour 3 - 3.5 hour	Ratio 1: 4.5	
TP Jr. High School	4 FTE MM	2 - 6.0 hour 3 - 3.0 hour		
	1 FTE ED Teacher	1 - 7.0 hour 2 - 3.5 hour	Ratio 1:4	
	1 FTE ESN	1 - 7.0 hour 2 - 3.5 hour	Ratio 1:2.5	
BR High School	1 MM Teacher	No IA Support		
TP High School	4 FTE MM Teacher	2 - 6.0 hour 1 - 5.0 hour 2 - 3.0 hour		
	2 FTE ESN	2 - 7 Hr IA 4 - 3.5 hour	Ratio 1: 3.5	
	1 FTE ED Teacher	1 - 7.0 hour 2 - 3.5 hour (both vacant all year)	Ratio 1: 5	
YV High School	5 FTE MM	1 - 7.0 hour 8 - 3 Hr IA		
	3 FTE ESN	5 - 7.0 hour 3 - 3.5 hour	Ratio 1: 3.5	
	1 FTE ED Teacher	1 - 7.0 hour 2 - 3.5 hour	Ratio 1:4	
ACCE - East	1.5 MM Teacher	No IA Support	This is an independent program; everything is 1:1.	
ACCE - West	.5 ESN Teacher			
Plus Program	2 FTE Teachers	8 - 6.0 hour Behavior IA 2 - 3.0 hour Behavior IA	Ratio 1 : 2.6	This is the equivalent of a Day Treatment Program

The District's staffing levels for instructional assistants and behavior technicians generally align with industry standards, and managing a personnel pool of this size represents a significant administrative undertaking. While there are no obvious indicators of overstaffing, a primary fiscal concern is the heavy reliance on outside contract agencies. Shifting toward a district-employed model would likely reduce overall expenditures and provide greater long-term stability.

A significant operational concern is the District's heavy reliance on three-hour instructional assistant positions. While part-time schedules may offer flexibility, they contribute to high resignation rates due to insufficient hours, ongoing recruitment and onboarding costs, disruption to continuity of services for students with disabilities, and increased reliance on contracted agency staff — an approach that is significantly more costly and less sustainable.

The District uses a SCIA assessment process to determine whether a student requires 1-to-1 support. This process is reported to be implemented consistently across the District and aligns with current industry expectations, prioritizing student independence, individualized decision-making, and data-driven guidance. However, staff do not consistently write independence goals or plans to reduce reliance on 1-to-1 support when it is added to a student's IEP, despite this being an important practice for focusing IEP services on deficit areas, monitoring annual progress, and determining whether adjustments to service level are needed.

Related Service Provider Staffing

A review of staffing ratios for the District's adapted physical education teachers, occupational therapists, physical therapists, credentialed school nurses, school psychologists, and speech and language pathologists was conducted.

Comparison of Industry Standard Provider-to-Student Ratios [5]

Provider Type	District Provider No.	Above (+) or Below (-) Industry Standard
School Psychologist 1 to 977	8	At Standard
Board Certified Behavior Analysis	1	While there is no formal industry standard for this specific role, the district’s expansive geographic footprint presents a significant operational challenge. A single provider must dedicate a substantial portion of their workday to traveling between sites, which directly reduces the time available for student-facing services and administrative duties. To maximize the efficiency of this position, the district should evaluate whether

[5] **Sources:** District and Industry standards, Education Code 56363.3.

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Provider Type	District Provider No.	Above (+) or Below (-) Industry Standard
		the current travel requirements are sustainable or if a more localized staffing approach is necessary to ensure that professional expertise is prioritized over transit time.
Behavior Instructional Assistants - assigned at school site with overly large special education populations and ESN programs	6	Staff support students under the supervision of the BCBA.
SLP (Preschool -22) 1-to-55	9 FTE caseload of 64 students	Below Industry Standard
APE Teacher 1-to-45-55	2 FTE caseload of 42 and 45	At Industry Standard
Physical Therapist 1-to-45-55	NPA Staff Utilized	
Occupational Therapist 1-to-45-55	NPA Staff Utilized	
Vision and Orientation and Mobility 1-to-10-30	1 FTE caseload of 9 students	Slightly Below
Deaf and Hard of Hearing 1-to-15-25	1 FTE caseload of 17 students	At Industry Standard
Nurse 1 to 2,274	3 FTE	Below Industry Standard

School psychologists are staffed at a ratio consistent with industry standards. The District employs 8 school psychologists, including those serving infant and preschool programs, and they function in a comprehensive role providing social-emotional and behavioral support, consultation with teachers, individual counseling, and psychoeducational assessments. The majority of psychologist time is consumed by initial and triennial assessments, of which 20–25 percent result in students being found ineligible — a direct consequence of insufficient pre-referral supports.

SLP caseloads average 64 students per provider against a statutory maximum of 55 under Education Code 56363.3. This is an active compliance risk and a priority area. The District currently employs 9.0 FTE SLP and 1.0 SLPA. While the SLPA provides service support, the SLP is still required to conduct all assessments and IEP meetings for students serviced by a SLPA.

APE staffing of 2.0 FTE with an average caseload of 43 students falls within industry standards; however, the District's geographic footprint creates significant travel demands that reduce direct service time. The substantial travel time required between school sites significantly reduces the window available for direct student service within a standard seven-hour workday, and students requiring APE services often have complex needs resulting in more time-intensive IEP meetings. APE staffing evaluations must account for these contextual factors beyond raw caseload numbers.

Occupational Therapy and Physical Therapy services are delivered entirely through non-public agency contracts. OT services cover 232 students at a contract cost of $800,000 annually. The number of students identified for OT services is significantly lower than peer districts of comparable size, suggesting a formal cost-benefit analysis of transitioning to an in-house model is warranted. PT services cover 9 students at a contract value under $25,000.

The District has 1 FTE with DHH specialization serving approximately 17 students — consistent with industry standards — and 1 FTE with visual impairment specialization currently serving 9 students, slightly below the industry standard range.

School nurse staffing at 3.0 FTE is 0.17 FTE below industry-standard recommendations. The District serves a growing population of students with complex medical needs. The District also employs unlicensed Health Technicians whose limited scope of practice requires frequent reassignment of staff to cover daily health duties, creating inefficiencies and disrupting continuity of care for medically fragile students. The special education department must frequently reassign staff to cover student health needs when absences occur, placing additional strain on an already extended team.

Area C: Continuum of Services and Least Restrictive Environment

The District provides a full continuum of special education programs and services from early childhood through age 22, including Early Start, stand-alone speech and language services, cross-categorical SDC programs, Specialized Academic Instruction through the Learning Center model, co-taught courses at the secondary level, Emotional Disabilities

SDC programs, Transition programs, and the PLUS Program. As a single-district SELPA, the District provides special education assessment and services to students from birth to age 5.

School-age LRE performance reports indicate the District met appropriate targets for the school-age population. Preschool LRE performance reports indicate the District has not met any targets for Indicator 6 in recent years.

District's 2023–24 Performance on Indicator 6 — Preschool Students in the LRE

Indicator 6 - Pre-K	Target	MUSD
A | % of preschoolers with disabilities who spend most of their day in a regular preschool program AND receive special education services in that setting	>45%	13%
B | % of preschoolers with disabilities who receive special education services in a separate setting (special class, special school, etc.)	<59.3%	27%
C | % of preschoolers with disabilities who attend a regular preschool program but receive services outside that setting	<0.5%	14.8%

The current three-hour preschool program structure is inconsistent with research-based recommendations for early childhood education. Research indicates that children who attend full-day programs often demonstrate stronger early learning outcomes and are less likely to be identified for special education services in early elementary grades. Federal guidance from the U.S. Departments of Education and Health and Human Services reinforces that the priority is full participation in regular early childhood settings alongside peers without disabilities, supported by appropriate services, rather than adherence to a predetermined schedule. Extending preschool program hours and evaluating the feasibility of a typical tuition-based preschool option would increase preschool students' access to general education settings and help establish a strong foundation for their participation in general education throughout their school-age years.

At the secondary level, IEP teams sometimes limit student access to general education settings rather than provide accommodations and supports necessary for meaningful participation. This has been identified as a training opportunity, particularly for site-level counselors who play a key role in course placement and scheduling. Access to general education environments and opportunities to interact with neurotypical peers are essential for maximizing student outcomes. The special education department recognizes the scope of this work and is motivated to build the support needed to implement these changes.

Area D: Central Office Organizational Structure

The organizational structure of a school district is crucial to the effectiveness of its special education program. An optimal structure fosters effective communication and collaboration across departments within the central office and schools.

Administrator/Leadership Positions Supporting Special Education in 2025-26 [6]

Position Title	Positions Total FTE
SELPA Director	1 FTE
Program Specialist(s)	2 FTE
Program Manager	1 FTE
Behavior Support Specialist	1 FTE
Special Education Teacher on Special Assignment	1 FTE
Family Support Embassaders	2 FTE 1 position Grant Funded
Total	**8**

Central Office Administrative Support Positions [7]

Position Title	Positions Total FTE
Administrative Assistant	1 FTE
Office Technician	1 FTE
Compliance/Data Technician	1 FTE
Total	**3**

Central office staffing levels are generally appropriate relative to the size of the special education population and are consistent with FCMAT comparison data. However, the program analysis indicates the District is over-identifying students, resulting in elevated staffing and service demands that could be reduced through stronger pre-referral systems. As MTSS implementation strengthens, the District will be positioned to realign roles and adjust staffing levels accordingly.

The SELPA Director/Special Education Director position carries a dual function as both special education director and SELPA manager — a responsibility structure unique to single-district SELPAs. Additionally, the role has been assigned responsibilities outside of

[6] **Source:** District-provided data.
[7] **Source:** District-provided data.

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special education, including Section 504 oversight and district mental health and health care services oversight. Given the breadth, complexity, and cumulative demands of special education alone, this review concludes that the combination of roles currently assigned is not sustainable over an extended period.

Area E: Legal Expenditures and Dispute Trends

The Individuals with Disabilities Education Act requires school districts to implement all procedural safeguards for students with exceptional needs. At the time of this review, the District had no Office of Administrative Hearings cases scheduled for 2025–26. Since August 2025, the District has settled three cases with total costs of $79,500. The Director's proactive approach to early resolution reduces both financial exposure and the operational burden associated with prolonged disputes.

Five-Year Summary of Legal Expenditures to include Settlements and Attorney Fees

School Year	# of Settlements/ Total Cost	Attorney Fees outside of Settlement Agreements
2020/21	0 filings / settlements	$0
2021/22	12 settlements = $265,500	$92,800
2022/23	5 settlements = $50,450	$37,225
2023/24	2 settlements = $33,500	
2024/25	5 settlements = $90,000	$48,000

Dispute Resolution Activity

School Year	ADR	Resolution Sessions	Mediations	Due Process Hearings
2020/21	0	0	0	0
2021/22	1	8	3	0
2022/23	0	5	0	0
2023/24	1	1	0	0
2024/25	0	3	2	0

The five-year trend reflects steady improvement in dispute resolution practices. The post-COVID peak of 2021–22 — 12 settlements totaling $265,500 and $92,800 in attorney fees — was consistent with statewide patterns that year. In subsequent years, the number of settlements, associated costs, and resolution session activity declined significantly. Across all five years, the District did not participate in any due process hearings — a meaningful indicator that disagreements are being addressed collaboratively and constructively rather than through adversarial processes.

One area requiring improvement is fiscal oversight. Special Services staff currently lack access to detailed budget information, limiting their ability to monitor spending or plan strategically. For 2024–25, the District allocated $150,000 for legal fees and $215,000 for settlements. Providing Special Services leadership with direct access to budget information would strengthen fiscal management and ensure that program decisions remain aligned with the District's financial realities.

Area F: Non-Public School Placement Review

There are currently no students placed in a non-public school. One student is under consideration for a potential residential placement. MUSD has a long-standing record of successfully serving students with significant needs in district programs, including students eligible under the category of Emotional Disturbance. The development of the PLUS Program has been instrumental in eliminating residential placements by providing a district-based therapeutic alternative.

Area G: Transportation Cost Misallocation

The District currently assigns all transportation costs for general special education students to the special education budget, rather than allocating only those costs that qualify as specialized transportation—the portion legitimately attributable to special education services under IDEA and applicable California Education Code provisions. Special education transportation is a related service provided only when necessary for a student with a disability to access their education as outlined in their IEP; it is not a general benefit, but a targeted support for students whose disabilities prevent them from using standard transportation safely or effectively.

General transportation serves the broader student population and should therefore be charged to the appropriate general fund transportation accounts. In contrast, only the incremental costs associated with transportation required as a related service under a student's IEP—such as specialized routing, wheelchair-accessible vehicles, or additional supervision during transit—constitute legitimate special education expenditures.

The effect of this misallocation is twofold. First, it artificially inflates the apparent cost of the special education program, overstating encroachment on the unrestricted general fund and distorting the fiscal picture used for planning and deficit reduction analysis. Second, and more urgently, the District is reporting that it is barely meeting the requirements of mandated financial compliance reports—specifically the SMA and SMB—as a direct consequence of this charging practice. This creates an active compliance risk that warrants immediate corrective action.

The misallocation also undermines the accuracy of any cost-benefit analysis conducted on the special education program, including the staffing and caseload analysis presented in this report. Until transportation costs are properly allocated, the true cost of special education services cannot be accurately assessed, and reduction targets cannot be reliably modeled.

Recommendations

Area A Recommendations: Enrollment, Identification, and MTSS

1. Identify the specific individuals and positions responsible for leading and coordinating MTSS — including PBIS — across the District. Conduct a comprehensive review of current roles and responsibilities, with particular attention to the scope of the SELPA Director's role relative to MTSS leadership.
2. Set a districtwide expectation that all schools consistently implement the SST process as a core component of MTSS. Provide ongoing monitoring, coaching, and accountability to ensure fidelity to established procedures, explicitly integrating PBIS practices into SST decision-making.
3. Create a comprehensive multi-year MTSS and PBIS action plan including: development of a district MTSS Handbook; clear role definitions for MTSS Coordinators; training for all general education staff on MTSS foundations and PBIS expectations; selection and alignment of academic and behavioral intervention tools; review and revision of MTSS and PBIS documentation; and updates to job descriptions for relevant staff.
4. Conduct a districtwide review of academic and behavioral intervention materials and practices to ensure all programs are evidence-based and aligned with MTSS and PBIS frameworks. Ensure that Intervention Teachers and Behavior Specialists are primarily delivering direct, targeted instruction rather than performing duties unrelated to intervention.
5. Establish a system for collecting, analyzing, and reporting MTSS and PBIS outcome data at the district, school, and grade levels, including universal screening results, progress-monitoring data, intervention effectiveness data, movement between tiers, and PBIS behavioral data.
6. Offer comprehensive professional learning focused on strengthening Tier 1 instruction and PBIS implementation, including differentiation strategies, Universal Design for Learning, classroom-based academic and behavioral interventions, PBIS expectations and reinforcement systems, and use of formative assessments and behavioral data.
7. Review and update the District's Section 504 processes to ensure alignment with current legal requirements. Provide training for administrators, counselors, and

teachers on eligibility determination, documentation requirements, implementation of accommodations, and monitoring and review procedures.

8. Develop systems to monitor and support fidelity of MTSS and PBIS implementation across all schools, including fidelity checklists, walkthrough tools, coaching cycles, and regular data reviews.

Area B Recommendations: Staffing and Caseloads

1. Immediately assess the feasibility and impact of increasing teacher staffing within SDC programs for students with extensive support needs at the elementary and middle school levels, with attention to grade span breadth in current programs.
2. Continue to monitor teacher staffing and caseloads to ensure compliance with the Education Code 56362(c) caseload standard.
3. Use industry-standard adult-to-student ratios to guide the assignment of special education instructional assistants and behavior technicians to SDCs. Determine whether staffing can be reduced while still meeting student needs.
4. Continue to consistently use the SCIA assessment to determine whether a student requires 1-to-1 student support. Ensure each IEP that calls for 1-to-1 support includes goals for independence and a support phase-out plan that is actively monitored.
5. Consistently evaluate whether a student determined to require 1-to-1 support needs it for the entire school day or only part of it. Assign 1-to-1 support only when required and only for the duration required.
6. Conduct a comprehensive analysis of current and projected SLP caseloads to determine whether staffing levels are sufficient. Given that average caseloads exceed the statutory maximum, this is a priority compliance area. An increase in robust pre-referral systems will reduce the long-term need for additional SLP staffing.
7. Conduct an annual comprehensive health services review evaluating total student enrollment, medical complexity of the special education population, and site-based health needs. Prioritize increasing credentialed school nurse staffing. Implement a strategic transition away from unlicensed health technicians through attrition and reclassification, with future hiring prioritizing Licensed Vocational Nurses. Formalize supervision and delegation protocols for all health staff.
8. Conduct a formal cost-benefit analysis of transitioning Occupational Therapy services from the current non-public agency contract model to an in-house staffing model.
9. Address the District over reliance on the use of 3.0 Instructional Assistant staff resulting in the need to contract for IA supports for students requiring full day coverage.

Area C Recommendations: Continuum of Services and LRE

1. Examine opportunities to increase program time for Pre-K students, recognizing that expanded access will have staffing and resource implications.
2. Form a stakeholder group to develop a comprehensive plan for increasing preschool students' access to general education settings.
3. Continue to prioritize professional development at the secondary level to strengthen staff capacity to support students with disabilities in general education academic classes.
4. Meet regularly with co-teaching teams to develop and implement an ongoing plan that strengthens their capacity to deliver high-quality, collaborative instruction, including clarifying roles, planning differentiated lessons, analyzing student data together, and refining instructional practices that promote inclusive, grade-level learning.
5. Review the curriculum currently used by SAI teachers, including materials supporting students with dyslexia, to ensure alignment with research-based, evidence-supported instructional programs. Several components of the existing curriculum appear outdated and a comprehensive review should include identifying gaps, evaluating the effectiveness of current resources, and considering adopting updated, research-validated programs.
6. Conduct a comprehensive review of current enrollment in all self-contained classes to ensure that class sizes align with appropriate program guidelines. Several programs are currently operating above recommended limits.
7. Continue the work toward a partnership with the Community College for students in the Adult Transition Program.

Area D Recommendations: Organizational Structure

1. Address over-identification of students through systematic review procedures to ensure eligibility determinations align with state and federal criteria, strengthened MTSS implementation prior to referral, and professional development for administrators and teachers on distinguishing disability from instructional, linguistic, or environmental factors.
2. Reevaluate the distribution of special education staff as MTSS becomes more fully implemented. Shift appropriate responsibilities from special education to general education intervention systems where feasible.
3. Conduct a workload analysis for program leads — including program specialists, psychologists, and related service providers — to ensure equitable distribution of responsibilities. Review administrative roles to identify opportunities to

consolidate or reallocate duties, including consideration of realigning the SELPA Director job description to a Student Services Director role.
4. Develop a multi-year staffing plan that anticipates shifts resulting from improved MTSS implementation and reduced over-identification.

Area E Recommendations: Legal Expenditures and Dispute Trends

1. Use position control information during budget development and hiring for special education salaries and benefits, particularly when the revenue source is not a special education SACS resource.
2. Review position control for instructional assistant and behavior technician placements. Reconcile payroll, position data, and budget allocations, with particular attention to positions filled by contractors.
3. Charge employee mileage, protocols, and supplies that support the special education program to the appropriate special education goal in SACS.
4. Continue involving Special Services Department leaders in the budgeting process and provide them with access to current balances and allocations within their budgets.
5. Continue monitoring the District's unrestricted general fund contribution to the special education program.

Area F Recommendations: Non-Public School Placements

1. Continue the District's current programming for students eligible under Emotional Disturbance, as it has demonstrated strong effectiveness in meeting student needs within district settings.
2. Monitor classroom enrollment to ensure appropriate staffing ratios and support levels.
3. Avoid creating classrooms with excessively broad grade spans, as this can dilute instructional quality and negatively impact student outcomes.

Area G Recommendations: Transportation Cost Misallocation

1. Conduct an immediate review of the District's transportation budget coding practices to identify all general transportation costs currently charged to the special education budget. Separate general student transportation expenditures from specialized transportation costs required under student IEPs.
2. Recode general transportation costs to the appropriate general fund transportation accounts. Only transportation services that are required as a related service under an individual student's IEP should be charged to the special education budget.

3. Engage the Director of Fiscal Operations and the SELPA Director jointly to establish clear, documented coding protocols for transportation expenditures that distinguish between general and specialized transportation going forward.
4. Review the impact of the corrected allocation on the SMA and SMB reporting to ensure the District achieves full compliance with mandated financial reporting requirements. If prior-year reports were affected, consult with the District's legal counsel and auditor to determine whether amended filings are required.
5. Following reallocation, reassess the District's unrestricted general fund contribution to the special education program using accurately coded expenditure data to establish a corrected baseline for deficit reduction planning.

Implementation Plan

Short-Term (0–6 Months) — Compliance, Stabilization, and Immediate Risk Controls

Priority actions in this phase address active compliance risks and establish the foundational structures for longer-term system improvement.

- Conduct a comprehensive SLP caseload analysis and develop a plan to bring all caseloads into compliance with Education Code 56363.3. This is a compliance priority.
- Initiate the annual comprehensive health services review. Develop a credentialed school nurse staffing increase plan.
- Clarify leadership and ownership of MTSS and PBIS across the District to include formal Identification and leadership assignment.
- Establish a districtwide expectation for consistent SST process implementation with monitoring and accountability structures.
- Develop a multi-year MTSS and PBIS action plan to include district wide MTSS Handbook
- Provide Special Services Department leaders with access to current budget balances and allocations.
- Initiate a cost-benefit analysis of transitioning Occupational Therapy services to an in-house model.
- Develop an action plan to address preschool least restrictive environment (LRE) concerns and evaluate the feasibility of implementing a fee-based general education preschool program to improve LRE placement outcomes and potentially generate additional revenue.
- Update Section 504 Handbook and create a plan for training to roll out for the 26/27 school year.
- Collaborate with HR regarding Instructional Assistant Hiring practices and dependence on 3.0 staff. Develop a plan to limit the use of contracted staff for IA needs.

- Conduct a position control review for instructional assistant and behavior technician placements and reconcile with payroll and budget allocations.
- Conduct a transportation budget coding review and recode general transportation costs to the appropriate general fund accounts. Establish joint HR–Fiscal coding protocols for transportation expenditures. Verify SMA and SMB compliance status following reallocation.
- Examine MediCal billing practices (Special Ed. Department Staff and Fiscal Office staff) to determine the appropriateness of designating staff (or adding a staff member) to increasing billing practices which will increase district revenues.
- Conduct workload analysis for program leads and develop recommendations for role restructuring including SELPA Director scope realignment.

Mid-Term (6–18 Months) — System Development and Staffing Alignment

- Launch full MTSS and PBIS implementation in alignment with the multi-year action plan, including universal screening, progress monitoring, and tiered intervention protocols.
- Begin a systematic review of the special education referral process and strengthen alignment with MTSS frameworks to ensure that referrals are preceded by appropriate tiered interventions.
- Implement Section 504 training and update related procedures to ensure consistent identification, evaluation, and accommodation practices.
- Reassess SDC caseloads and staffing as MTSS implementation strengthens and identification rates stabilize.
- Study feasibility for the implementation of a general education early childhood program (see Instructional Services section)
- Evaluate transition of Occupational Therapy services to an in-house model based on cost-benefit analysis findings.
- Form a stakeholder group to develop a comprehensive plan for increasing preschool students' access to general education settings.
- Implement licensed health staff transition — begin phasing out unlicensed health technician positions through attrition and reclassification.

Long-Term (18+ Months) — Structural Realignment and Sustainability

- Execute the multi-year staffing plan aligned to reduced special education identification rates resulting from strengthened MTSS and pre-referral systems.
- Realign Special Education Department roles and responsibilities based on workload analysis findings and MTSS implementation progress.
- Embed annual program evaluation cycles — including caseload review, LRE reporting analysis, and dispute resolution trend monitoring — into the Department's ongoing planning calendar.
- Reassess SDC caseloads and staffing as MTSS implementation strengthens and identification rates stabilize.

Conclusion

MUSD's special education program reflects a department of committed, capable staff working within a system that has outgrown its current structure. The accomplishments documented in this review — the elimination of residential placements, the development of the PLUS Program, expanded inclusive practices, strengthened dispute resolution practices, and the implementation of the SCIA assessment process — are meaningful indicators of a program that is moving in the right direction. The District's consistent avoidance of due process hearings over five years and the steady decline in settlement costs reflect a culture of collaborative problem-solving that is worth protecting and building upon.

The central finding of this review is that the District's special education identification rate — at 18 percent, significantly above both county and state averages — is not primarily a special education problem. It is a general education problem. The absence of consistently implemented pre-referral systems, an underdeveloped MTSS framework, and limited use of Section 504 as an intermediate support pathway are collectively routing students into special education who could be effectively served through general education interventions. This has direct and material fiscal consequences: over-identification drives elevated staffing demands, increases encroachment on the unrestricted general fund, and places compliance pressure on related service providers — most immediately the District's Speech and Language Pathologists, whose average caseloads currently exceed the statutory maximum. Addressing over-identification is therefore not a programmatic refinement. It is the District's single highest-leverage fiscal opportunity within the special education system.

The path forward depends on two parallel workstreams. The first is the development and consistent implementation of a districtwide MTSS and PBIS framework — a multi-year undertaking that requires clear leadership ownership, standardized protocols, protected coordinator roles, and sustained professional development. The second is the realignment of the SELPA Director role to a scope that is sustainable and focused, ensuring that leadership capacity is not diluted across responsibilities that extend well beyond the traditional boundaries of special education. As MTSS matures and identification rates stabilize, the District will be positioned to reassess staffing levels, redistribute responsibilities, and align special education resource deployment with actual student need. The recommendations in this report are designed to support that transition in a deliberate, phased, and fiscally responsible manner.

Facilities Optimization Review

Executive Summary

MUSD operates 17 school sites across a geographically dispersed rural service area, with a facilities portfolio constructed to accommodate substantially more students than currently enrolled. At approximately 52 percent utilization, the gap between the District's physical footprint and its current student population represents one of the most significant structural contributors to its ongoing fiscal imbalance. Fixed costs associated with operating underutilized campuses — staffing, maintenance, utilities, and administration — do not scale proportionally with enrollment decline. Every year that the facilities footprint remains misaligned with enrollment reality compounds the structural deficit documented throughout this report.

Facilities optimization is not a single decision. It is a category of decisions — spanning consolidation, repurposing, lease, and surplus property dispensation — that together determine how efficiently the District deploys its physical assets in support of students and fiscal sustainability. Each pathway carries distinct fiscal implications, operational considerations, community impacts, and timelines, and the appropriate mix will depend on site-level data, legal requirements, and community engagement that are currently being developed through the MUSD Enrollment/7-11 Advisory Committee process.

The 7-11 Committee, appointed by the Board of Education pursuant to California Education Code Section 17387, has been conducting a rigorous, community-informed review since January 2026 and is expected to present its final recommendations to the Board at the first June 2026 meeting. This section establishes the aggregate fiscal and operational basis for facilities optimization as a budget stabilization priority and frames the Committee's forthcoming recommendations as the appropriate next step.

Background and Scope

MUSD's facilities were constructed to accommodate enrollment levels significantly higher than currently exist. Districtwide classroom capacity exceeds 14,000 seats against a current enrollment of approximately 7,361 students, producing a utilization rate of approximately 52 percent that is projected to decline further as enrollment continues to fall through 2029–30.

The District's geographic configuration — multiple small, isolated campuses spread across a large rural service area — creates inherent minimum staffing and operational thresholds at each site regardless of how few students are served. Each campus requires administrative coverage, custodial services, maintenance, utilities, and site-based support. These fixed costs do not decline in proportion to enrollment, creating a structural inefficiency that grows more pronounced with each year of continued decline.

At the same time, underutilized facilities represent not only a cost burden but also a potential asset. Surplus or underutilized properties may present opportunities to generate revenue through lease or sale, reduce ongoing operational expenditure, or support program consolidation in ways that improve educational quality and equity for students. The appropriate analysis of these options requires site-level data, facilities condition assessments, demographic projections, legal review, and community input — all of which are being developed through the 7-11 Committee process.

Study Team

This section was prepared by School Leaders based on aggregate district financial and enrollment data reviewed as part of the broader Budget Stabilization engagement. Site-level facilities analysis, demographic projections, and consolidation scenario development are being conducted by the Enrollment/7-11 Advisory Committee and its supporting team, including the District Superintendent, Deputy Superintendent/CFO, District Architect, District Demographer, and Legal Counsel. Dr. Stella Kemp, School Leaders, is serving as Committee Facilitator.

Key Findings

- **Facility utilization is at 52 percent and declining.** The District's 14,000-seat capacity against current enrollment of approximately 7,361 students produces a utilization rate that is projected to fall further absent corrective action. Operating a facilities portfolio sized for a significantly larger student population places ongoing structural pressure on the unrestricted general fund.
- **Fixed costs on underutilized campuses are a primary driver of structural deficit.** Administrative, facilities, and operational expenditures at small and underenrolled campuses represent a disproportionate cost relative to the number of students served. These costs cannot be resolved through staffing adjustments alone — they require decisions about the facilities footprint itself.
- **Underutilized facilities represent both a cost challenge and a potential revenue and efficiency opportunity.** Depending on site characteristics, legal parameters, and community considerations, underutilized properties may be candidates for consolidation, lease, repurposing, or surplus designation. Each pathway has distinct fiscal implications — some generating recurring savings, others producing one-time revenue — and the appropriate mix requires the site-level analysis currently underway through the 7-11 Committee.

- **Preliminary analysis indicates that consolidation of underenrolled campuses will generate meaningful recurring savings.** The Enrollment/7-11 Advisory Committee is in the process of validating specific figures through its site-level analysis, with final savings estimates to be presented to the Board in June 2026.
- **Small campus enrollment constrains program quality and equity.** Beyond fiscal impact, underenrolled campuses limit the District's ability to deliver robust academic programs, viable class-size configurations, and equitable access to enrichment, intervention, and special education services across all students.
- **A formal community-informed process is already underway.** The Enrollment/7-11 Advisory Committee has met six times between January and April 2026, examining enrollment and demographic trends, facilities conditions, operational costs, transportation, special education program placement, boundary adjustments, surplus property, and community input. The Committee's final recommendations are expected at the first June 2026 Board meeting.

Analysis

The fiscal case for facilities optimization is established by the aggregate data present throughout this report. At the current expenditure trajectory, the District is projected to approach unrecoverable reserve depletion FY 2029–30. The District facilities footprint is one of the few available levers that can produce meaningful recurring savings — or generate revenue — at a scale sufficient to materially affect that trajectory.

The range of available pathways includes the following, each carrying different fiscal characteristics. No MUSD-specific quantitative analysis has been conducted on lease, sale, or repurposing options as part of this engagement. The fiscal potential of those pathways will be informed by the site-level work of the 7-11 Committee and any subsequent analysis the District undertakes.

Consolidation reduces the number of active campuses, eliminating fixed site-level operating costs and enabling staffing reductions for redundant positions. Savings are recurring and structural. Preliminary analysis conducted through the 7-11 Committee process indicates that consolidation of underenrolled campuses is projected to generate meaningful annual savings. The specific figure will be validated and reported in the Committee's final recommendations to the Board in June 2026. Consolidation requires community engagement, a formal process, and implementation lead time before savings are realized.

Lease of surplus or underutilized space generates recurring revenue without permanently removing assets from the District's portfolio. Revenue potential depends on site characteristics, market conditions, and community interest. No MUSD-specific lease revenue analysis has been conducted as part of this engagement. Lease arrangements can be structured to begin generating revenue relatively quickly and can be designed as short- or long-term depending on the District's strategic needs and the outcome of the 7-11 Committee's surplus property review.

Sale of surplus property generates one-time revenue that can be directed toward addressing long-term obligations or one-time costs. Property sale proceeds are generally restricted in their use for ongoing operational purposes and do not directly address structural deficit unless paired with expenditure reductions. No MUSD-specific property valuation has been conducted as part of this engagement. Sale of property requires compliance with the Naylor Act and other legal parameters and typically involves a longer timeline to execute.

Repurposing of underutilized facilities for district programs, community partnerships, or shared-use arrangements may reduce the cost burden of maintaining properties while generating community benefit or modest revenue. This pathway is typically lower in fiscal impact than consolidation or sale but carries fewer operational and community complexities.

The appropriate mix of these pathways for MUSD will be determined by the site-level analysis, facilities condition assessments, and community input developed through the 7-11 Committee process. This report does not prescribe a specific course of action. It establishes the fiscal basis for action and the framework within which the Committee's recommendations should be evaluated.

Recommendations

1. Receive and carefully consider the Enrollment/7-11 Advisory Committee's final consolidation, boundary, and surplus property recommendations at the first June 2026 Board meeting. The Committee's work represents the site-level analytical foundation necessary to translate the aggregate findings in this report into specific action.
2. Evaluate the full range of facilities optimization pathways — consolidation, lease, sale, and repurposing — in light of the Committee's recommendations, giving consideration to both the recurring and one-time fiscal implications of each.
3. Direct staff to incorporate the confirmed financial impact of any approved facilities actions into the District's multiyear financial projections and deficit reduction planning, clearly distinguishing between recurring savings and one-time revenue.
4. Ensure that facilities decisions are coordinated with the Measure C capital improvement program to avoid bond investments in facilities that may be

consolidated or surplus-designated, and to ensure that capital investments align with the District's intended long-term footprint.

5. Following action on initial consolidation recommendations, commission an updated utilization analysis covering the full facilities portfolio to determine whether additional consolidation, reconfiguration, or repurposing is warranted given continued enrollment projections.
6. Establish an annual facilities utilization review as part of the District's ongoing budget development process to ensure the facilities footprint remains continuously aligned with enrollment reality.

Implementation Plan

Short-Term (0–6 Months) — Board Action and Planning

Receive the 7-11 Committee's final recommendations at the June 2026 Board meeting. Evaluate recommendations across the full range of pathways — consolidation, lease, sale, and repurposing — and adopt a board resolution directing next steps. Direct staff to develop implementation plans for approved actions, including transition logistics, transportation adjustments, community communication, and staffing redeployment where applicable. Incorporate confirmed fiscal impacts into the multiyear financial projection.

Mid-Term (6–18 Months) — Implementation and Revenue Development

Execute approved facilities actions in accordance with adopted implementation plans. Initiate lease or sale processes for any surplus-designated properties in compliance with Naylor Act requirements. Monitor operational savings and revenue generation as actions take effect. Begin broader facilities utilization analysis covering middle and high school campuses.

Long-Term (18+ Months) — Ongoing Optimization

Complete the broader facilities utilization review and bring findings to the Board with options for action. Embed annual facilities utilization reporting into the budget development cycle. Assess whether additional optimization opportunities exist as enrollment projections are updated and initial consolidation actions are fully implemented. Expand facility use opportunities across underutilized sites, including community partnerships and shared-use arrangements consistent with the Civic Center Act.

Conclusion

The District's 52 percent facility utilization rate is not a peripheral budget issue. It is a structural condition that will continue to compound the fiscal pressures documented throughout this report until it is addressed. The 7-11 Committee process has laid the analytical and community engagement groundwork for the Board to act. The decisions ahead — whether they involve consolidation, lease, sale, repurposing, or some combination — should be evaluated on their individual merits, their fiscal characteristics, and their alignment with the District's long-term educational and financial priorities. This report does not prescribe a specific outcome. It provides the fiscal context within which those decisions should be made and affirms that acting on the Committee's forthcoming recommendations is among the most consequential steps available to the District in addressing its structural deficit.

Consolidated Recommendations Summary

This section consolidates all recommendations from the seven departmental reviews comprising this Budget Stabilization Review. Recommendations are organized by department and presented in the sequence in which they appear in each section. Where financial impact estimates have been identified, they are noted alongside the recommendation. Where a recommendation has a direct dependency on or connection to another department's work, that cross-reference is noted.Recommendations are categorized by primary purpose:

- E — Expenditure Reduction
- R — Revenue Generation or Recovery
- C — Compliance
- G — Governance and Systems

Some recommendations serve more than one purpose and are noted accordingly.

Human Resources

#	Recommendation	Type	Financial Impact
HR-1	Establish a standing monthly HR–Fiscal position control reconciliation meeting with a standardized agenda covering authorized vs. filled FTE, vacancies, separations, leaves of absence, substitute utilization, and grant-funded positions.	G	Reduces budget drift and payroll risk
HR-2	Implement a unified staffing dashboard providing real-time reconciliation of payroll expenditures, budgeted FTE, position control records, and funding sources.	G	—
HR-3	Adopt a formal vacancy replacement protocol tied to enrollment and fiscal triggers, including enrollment-based staffing guardrails and cabinet-level oversight for new or restructured positions.	E / G	—
HR-4	Standardize and fully document position control workflows, embedding routing protocols within the District's approval systems to reduce reliance on institutional knowledge.	G	—
HR-5	Conduct quarterly reconciliation of grant-funded and one-time funded positions, including funding expiration timelines and sustainability analysis.	G / C	—
HR-6	Develop and implement fully documented standard operating procedures for all core HR functions, including onboarding, separations, leave management, and credentialing compliance.	G / C	—

#	Recommendation	Type	Financial Impact
HR-7	Initiate targeted staffing reductions at the elementary level (~14.0 FTE) and high school level (~9.0 FTE) in alignment with enrollment projections, while adding approximately 6.0 FTE at the middle school level as projected growth warrants.	E	Net reduction of approximately 17.0 FTE
HR-8	Strengthen absence management practices through consistent monitoring tools and clearly defined accountability structures at both site and central office levels.	E	Reduces substitute costs
HR-9	Consider adoption of a formal structural balance board policy requiring that ongoing expenditures be supported by ongoing revenues and establishing minimum reserve targets above the state-required floor.	G	—
HR-10	Conduct a formal analysis of maintenance trade staffing relative to square-footage benchmarks and develop a phased attrition management plan. (See also MO-3)	E	—

Technology

#	Recommendation	Type	Financial Impact
T-1	Issue an RFP for VoIP phone system replacement.	E	~$70,000+/year savings
T-2	Issue an RFP for PA and bell system requiring non-proprietary standards to prevent vendor lock-in.	E	Avoids future lock-in costs
T-3	Conduct a structured audit of 170+ active third-party application licenses for redundancy and non-use, with a full usage and cost report within 60 days.	E	Significant — TBD pending audit
T-4	Implement software usage monitoring. Establish a policy that no contract is renewed without usage data review; fewer than 30% active monthly users constitutes a default non-renewal.	E	—
T-5	Conduct a full hardware inventory by site covering all student devices, staff laptops, carts, projectors, and peripherals.	G	—
T-6	Centralize staff and student hardware check-out through the school library at each site. Implement a year-end sign-off sheet and exit check-out process for departing staff.	G	Reduces asset loss
T-7	Establish a joint IT/Instructional Services project planning calendar. No classroom technology purchase or deployment should proceed without both departments aligned. (See also IS-3)	G	—
T-8	Formalize Educational Tech Lead monthly meetings with a confirmed stipend structure.	G	—

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#	Recommendation	Type	Financial Impact
T-9	Finalize a formal AI Acceptable Use Policy and staff/student guidelines by end of current school year.	G / C	—
T-10	Bring the STEAM Labs co-funding strategy to the board and authorize pursuit of the COOR Fund grant.	R	$2,000,000 potential (one-time)
T-11	Develop a funded five-year device refresh plan with annual funding projections and Measure C alignment.	G	—
T-12	Evaluate transitioning grades 5–12 to a 1:1 take-home device model beginning with the next refresh cycle, with K–4 remaining cart-based.	G	Reduces cart maintenance costs
T-13	Conduct a formal Windows vs. Chromebook total cost of ownership comparison before committing to the next device purchase cycle.	E	TCO savings TBD
T-14	Evaluate excluding the internal OPS module from new interactive screen purchases.	E	~$345,000 over full refresh cycle (one-time)
T-15	Expand smart irrigation system integration across additional school sites. Conduct a baseline water usage audit.	E	$50,000–$100,000/year once fully implemented
T-16	Fill the current East Site Technician vacancy.	G	—
T-17	Evaluate the proposed IT organizational restructuring for 2025–2026 in the context of the District's broader budget position.	G	—
T-18	Review Typing.com and KAMI contract utilization.	E	Up to $16,600/year combined
T-19	Analyze Microsoft/Google licensing overlap (Office 365 and Google Workspace).	E	Savings TBD
T-20	Establish a K–12 student communication standards policy. Consolidate around Synergy's parent portal as the primary vehicle for official communication.	G / E	Eliminates redundant platform costs

Maintenance and Operations

#	Recommendation	Type	Financial Impact
MO-1	Freeze hiring for general maintenance positions and do not fill the vacant grounds position until staffing targets are reached.	E	—

#	Recommendation	Type	Financial Impact
MO-2	Implement the two-role management structure: Director and Operations Manager. Convert one existing foreman position to a working Night Lead to reduce supervision layers.	E	Net reduction of 3.0 management FTE
MO-3	Reduce maintenance field staffing from 13.0 FTE to a target of 9.0 FTE through attrition and vacancy management. Protect HVAC and electrical capacity throughout the reduction period.	E	Net reduction of 4.0 FTE
MO-4	Establish an on-call contract bench for roofing, painting, locksmith overflow, and other periodic specialty work.	E	Offsets cost of reduced in-house capacity
MO-5	Adopt a work-order triage protocol (life/safety, instructional disruption, preventive maintenance, routine) and track response times weekly.	G	—
MO-6	Redeploy custodial positions from over-benchmarked elementary sites to under-benchmarked secondary sites before eliminating positions.	E	Net reduction of ~2.0 FTE over time
MO-7	Develop and implement a Comprehensive Maintenance Plan and preventive maintenance calendar to reduce reactive work.	G	Reduces reactive maintenance costs
MO-8	Define service level targets for cleaning frequencies by site type and response times for life/safety and instructional disruptions.	G	—
MO-9	Standardize East/West route schedules and implement a single dispatch queue for maintenance coverage.	G / E	—
MO-10	Do not reduce grounds staffing below current filled levels. Manage costs through route planning, irrigation prioritization, and seasonal contracting.	G	—

Business Services

#	Recommendation	Type	Financial Impact
BS-1	Establish a formal, standing position control reconciliation process between Business Services and Human Resources, including a defined meeting cadence, shared dashboard, and escalation pathway. (See also HR-1)	G	Reduces budget drift risk
BS-2	Redesign the purchasing and requisition workflow to reduce PO processing time. Define clear approval timelines and establish accountability for adherence.	G	Reduces operational inefficiency
BS-3	Formalize and enforce internal controls for petty cash and discretionary spending at all school sites, including pre-approval requirements and periodic audits.	G / C	—

BS-4	Develop and distribute standardized purchasing and budget protocols to all site leaders and department staff, with accompanying training.	G	—
BS-5	Establish a formal facility use fee structure that is clearly documented, publicly communicated, and consistently applied across all sites. Conduct regular reviews of rates and cost recovery targets to reflect current operational costs, and maintain compliance with Civic Center Act requirements governing public school facility use.	R	Revenue currently unrealized — TBD
BS-6	Working with Instructional Services, develop a formal, systematic approach to attendance improvement including site-level ADA recovery targets, intervention protocols, and monitoring reports. (See also IS-2)	R	LCFF revenue tied to ADA recovery
BS-7	Develop a structured long-term OPEB funding strategy that identifies one-time resources — including potential property sales — for addressing long-term liabilities.	G / E	Reduces long-term obligation exposure
BS-8	Establish a cross-department coordination cadence between Business Services, Human Resources, and Instructional Services, with documented agendas, shared data, and clear decision-making protocols.	G	—
BS-9	Develop a multi-year deficit spending reduction plan that explicitly sequences corrective actions across short-term, mid-term, and long-term horizons.	G	—
BS-10	Strengthen budget communication to site leaders, including clear documentation of allocation methodologies, budget assumptions, and changes between budget cycles.	G	—

Instructional Services

#	Recommendation	Type	Financial Impact
IS-1	Create dedicated system leadership roles: Director/Coordinator of Attendance and Engagement, PBIS/Behavior Systems Coordinator, and Math TOSA (K–12 Articulation).	E / R	ADA recovery revenue offsets position cost
IS-2	Formalize the Attendance Recovery System. Implement weekly data cycles, standardized intervention protocols, and a districtwide goal of +2–3% ADA recovery within 12 months. (See also BS-6)	R	Each 1% ADA improvement generates meaningful LCFF revenue
IS-3	Redefine and protect MTSS coordinator roles. Formally remove MTSS coordinators from administrative duties. (See also SE-A1)	E / G	Reduces special education

#	Recommendation	Type	Financial Impact
			over-referral costs
IS-4	Freeze non-essential hiring and conduct a comprehensive position control audit.	E / G	—
IS-5	Launch Homeschool and Independent Study Recovery Initiative with a dedicated program lead.	R	LCFF revenue from enrollment recovery
IS-6	Develop and implement a community-informed plan to consolidate 2–4 schools. Reinvest savings into academic programs, MTSS infrastructure, and transportation support. (See also Facilities)	E	Recurring savings — pending 7-11 Committee
IS-7	Complete the buildout of an integrated MTSS system across all three tiers. (See also SE-A3)	E	Reduces special education over-referral expenditure
IS-8	Develop specialized school pathways — STEM/STEAM, dual language, CTE, Independent Study Academy — to differentiate program offerings and recapture enrollment.	R	LCFF revenue from enrollment recovery
IS-9	Launch a fee-based preschool program targeting working families and the military community.	R	Direct revenue and future K–12 enrollment pipeline
IS-10	Align all staffing to the reduced-enrollment reality through a combination of attrition and school consolidation. Implement zero-based budgeting districtwide.	E	—
IS-11	Develop a districtwide instructional framework and learner profile aligned to Vision 2035.	G	—
IS-12	Transition to a full 1:1 device model with a leasing refresh cycle. (See also T-12)	G / E	Reduces long-term device replacement costs
IS-13	Expand facility rentals in compliance with the Civic Center Act, pursue grants and community partnerships, and improve utilization of community school funding streams.	R	Revenue TBD

Special Education

Area A — Enrollment, Identification, and MTSS

#	Recommendation	Type	Financial Impact
SE-A1	Identify and formally assign leadership ownership of MTSS and PBIS across the District. Conduct a comprehensive review of current roles and responsibilities. (See also IS-3)	G	—
SE-A2	Set a districtwide expectation for consistent SST process implementation with monitoring, coaching, and accountability structures.	G	Reduces unnecessary assessments
SE-A3	Create a comprehensive multi-year MTSS and PBIS action plan including a district MTSS Handbook, role definitions, training, intervention tool alignment, and job description updates.	G	—
SE-A4	Conduct a districtwide review of academic and behavioral intervention materials. Ensure Intervention Teachers and Behavior Specialists are delivering direct instruction.	G / E	—
SE-A5	Establish a system for collecting, analyzing, and reporting MTSS and PBIS outcome data districtwide.	G	—
SE-A6	Offer comprehensive professional learning focused on strengthening Tier 1 instruction and PBIS implementation.	G	—
SE-A7	Review and update the District's Section 504 processes. Provide training for administrators, counselors, and teachers.	C	—
SE-A8	Develop systems to monitor and support fidelity of MTSS and PBIS implementation across all schools.	G	—

Area B — Staffing and Caseloads

#	Recommendation	Type	Financial Impact
SE-B1	Immediately assess the feasibility of increasing teacher staffing within SDC programs for students with extensive support needs at the elementary and middle school levels.	C / G	—
SE-B2	Continue to monitor teacher staffing and caseloads to ensure compliance with Education Code 56362(c).	C	—
SE-B3	Use industry-standard adult-to-student ratios to guide IA and behavior technician assignments. Determine whether staffing can be reduced while meeting student needs.	E	Savings TBD
SE-B4	Continue consistent use of the SCIA assessment. Ensure each IEP calling for 1-to-1 support includes independence goals and a phase-out plan.	G / C	—

SE-B5	Consistently evaluate whether 1-to-1 support is needed for the full school day. Assign only when and for the duration required.	E	Reduces contracted agency reliance
SE-B6	Conduct a comprehensive SLP caseload analysis. Develop a plan to achieve compliance with Education Code 56363.3 caseload maximums.	C	—
SE-B7	Conduct an annual comprehensive health services review. Increase credentialed school nurse staffing. Transition away from unlicensed health technicians through attrition and reclassification.	C / G	—
SE-B8	Conduct a formal cost-benefit analysis of transitioning Occupational Therapy services from the NPA contract model to an in-house staffing model.	E	Current NPA contract: $800,000/year

Area C — Continuum of Services and LRE

#	Recommendation	Type	Financial Impact
SE-C1	Examine opportunities to increase program time for Pre-K students.	G	—
SE-C2	Form a stakeholder group to develop a plan for increasing preschool students' access to general education settings.	G / C	Supports LRE compliance
SE-C3	Continue prioritizing professional development at the secondary level to support students with disabilities in general education.	G	—
SE-C4	Meet regularly with co-teaching teams to strengthen collaborative instruction capacity.	G	—
SE-C5	Review SAI curriculum including materials supporting students with dyslexia to ensure alignment with evidence-supported programs.	G	—
SE-C6	Conduct a comprehensive review of enrollment in all self-contained classes to ensure class sizes align with program guidelines.	C	—
SE-C7	Continue the work toward a Community College partnership for the Adult Transition Program.	G	—

Area D — Organizational Structure

#	Recommendation	Type	Financial Impact
SE-D1	Address over-identification through systematic eligibility review procedures, strengthened MTSS implementation, and professional development on distinguishing disability from instructional factors.	E / G	Reduces long-term staffing demand

SE-D2	Reevaluate the distribution of special education staff as MTSS matures. Shift appropriate responsibilities to general education intervention systems.	E	—
SE-D3	Conduct a workload analysis for program leads. Review administrative roles for consolidation or reallocation opportunities including realignment of the SELPA Director role.	E / G	—
SE-D4	Develop a multi-year staffing plan anticipating shifts from improved MTSS implementation and reduced over-identification.	E / G	—

Area E — Legal Expenditures and Dispute Trends

#	Recommendation	Type	Financial Impact
SE-E1	Use position control information during budget development and hiring for special education salaries and benefits.	G / C	—
SE-E2	Review position control for IA and behavior technician placements. Reconcile payroll, position data, and budget allocations.	G / C	—
SE-E3	Charge employee mileage, protocols, and supplies supporting special education to the appropriate SACS goal.	C	—
SE-E4	Continue involving Special Services Department leaders in the budgeting process and provide access to current balances and allocations.	G	—
SE-E5	Continue monitoring the District's unrestricted general fund contribution to the special education program.	G	—

Area F — Non-Public School Placements

#	Recommendation	Type	Financial Impact
SE-F1	Continue current programming for students eligible under Emotional Disturbance.	G	Avoids high-cost NPS placements
SE-F2	Monitor classroom enrollment to ensure appropriate staffing ratios and support levels.	G / C	—
SE-F3	Avoid creating classrooms with excessively broad grade spans.	G	—

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Financial Impact Summary[8]

Recommendation	Type	Annual Savings ($)	Annual Revenue ($)	One-time Impact ($)	4-Year FTE	FY 26-27	FY 27-28	FY 28-29	FY 29-30	Status
TECHNOLOGY										
Audit 170+ third-party app licenses for redundancy and non-use	Cost Savings	$280,000	—	—	—	Study	$280,000	$280,000	$280,000	Ongoing
Replace VoIP system via RFP (exit Mitel/Windstream)	Cost Savings	$70,000	—	($20,000)	—	$70,000	$70,000	$70,000	$70,000	One Time
Complete hardware inventory; develop refresh plan	Cost Savings	TBD	—	—	—	TBD	TBD	TBD	—	Ongoing
Implement 1:1 device program for grades 5–12	Cost Savings	($500,000)	—	—	—	—	($500,000)	($500,000)	($500,000)	Ongoing
Cybersecurity E-Rate Pilot participation	Revenue Offset	$100,000	—	$300,000	—	$100,000	$100,000	$100,000	($100,000)	Ongoing
In-house printer support (eliminate vendor contract)	Cost Savings	$50,000	—	—	—	$50,000	$50,000	$50,000	$50,000	Ongoing
Interactive screen refresh — exclude OPS module	Capital Avoidance	—	—	$345,000	—	$345,000	—	—	—	One Time
Smart irrigation integration across additional sites	Cost Savings	$75,000	—	—	—	$75,000	$75,000	$75,000	$75,000	Ongoing
Microsoft / Google licensing optimization	Cost Savings	TBD	—	—	—	TBD	TBD	TBD	—	Ongoing
Align IT staffing to enrollment (1 tech / 1,000 students)	FTE Reduction	$108,000	—	—	—	$108,000	$108,000	$108,000	$108,000	Ongoing

[8] Figures in parentheses indicate costs or reductions. FTE impact shown as net change. TBD figures require further analysis. FY projections reflect year-over-year cumulative impact. Attendance recovery, MTSS, and Special Education over-identification figures are conditional on implementation fidelity. Facilities Optimization savings pending 7-11 Advisory Committee final recommendations (June 2026).

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Recommendation	Type	Annual Savings ($)	Annual Revenue ($)	One-time Impact ($)	4-Year FTE	FY 26-27	FY 27-28	FY 28-29	FY 29-30	Status
HUMAN RESOURCES										
Classroom staffing alignment to enrollment (Year 1: net −17 FTE)	FTE Reduction	**$2,225,000**	—	—	(17.0)	**$2,225,000**	**$2,225,000**	**$2,225,000**	**$2,225,000**	Ongoing
Classroom staffing alignment to enrollment (Year 2: −4 FTE)	FTE Reduction	—	—	—	(4.0)	—	**$500,000**	**$500,000**	**$500,000**	Ongoing
Classroom staffing alignment to enrollment (Year 3: −4 FTE)	FTE Reduction	—	—	—	(4.0)	—	—	**$500,000**	**$500,000**	Ongoing
Classroom staffing alignment to enrollment (Year 4: −1 FTE)	FTE Reduction	—	—	—	(1.0)	—	—	—	**$125,000**	Ongoing
Early Retirement Incentive — feasibility study	Process Study	TBD	—	—	—	—	—	—	—	Study
Shifting grant-funded positions (LRBG, SSG) to General Fund	FTE Reduction	—	—	**$2,000,000**	—	**$667,000**	**$667,000**	**($667,000)**	**($667,000)**	One Time
MAINTENANCE & OPERATIONS										
Reduce maintenance field staff 13 → 9 FTE via attrition	FTE Reduction	**$376,000**	—	—	(4.0)	—	**$376,000**	**$376,000**	**$376,000**	Ongoing
Consolidate M&O management 6 → 3 FTE (Director + Ops Mgr + Night Lead)	FTE Reduction	**$447,000**	—	—	(3.0)	—	**$447,000**	**$447,000**	**$447,000**	Ongoing
Reduce custodial 48 → 46 FTE via vacancy management	FTE Reduction	**$100,000**	—	—	(2.0)	—	**$100,000**	**$100,000**	**$100,000**	Ongoing
Hold 1 vacant grounds position (vacancy hold, not layoff)	FTE Reduction	**$69,000**	—	—	(1.0)	—	**$69,000**	**$69,000**	**$69,000**	Ongoing

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Recommendation	Type	Annual Savings ($)	Annual Revenue ($)	One-time Impact ($)	4-Year FTE	FY 26-27	FY 27-28	FY 28-29	FY 29-30	Status
BUSINESS SERVICES										
Implement multi-year position control (Level 3+)	Process	TBD	—	–	–	–	–	–	—	Impl.
Budget development calendar and assumptions discipline	Process	TBD	—	–	–	–	–	–	—	Impl.
Quarterly financial dashboard to Board	Process	TBD	—	–	–	–	–	–	—	Launch
Internal audit and controls review	Process	TBD	—	–	–	–	–	–	—	Impl.
Review transportation accounting for Special Education	Process	TBD	—	–	–	–	–	–	–	Impl
Dedicated Accounting Technician for Special Education	FTE Addition	($70,000)	—	–	1.0	($70,000)	($70,000)	($70,000)	($70,000)	Ongoing
Purchasing department process and workload review	Process	TBD	—	–	—	—	—	—	—	Study
Print Shop, printer/copier contract review	Process	TBD	—	–	—	—	—	—	—	Study
Chart of accounts and SACS structure cleanup	Process	TBD	—	–	—	—	—	—	—	Impl.
Review Nutrition Services accounting to streamline efforts and align with county system	Process	TBD	—	–	—	—	—	—	—	Study/Impl.
INSTRUCTIONAL SERVICES										
Improve ADA by 1%/yr for 3 years; stabilize at 93%	Revenue	—	$880,000	–	–	$440,000	$880,000	$1,760,000	$2,640,000	Ongoing

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Recommendation	Type	Annual Savings ($)	Annual Revenue ($)	One-time Impact ($)	4-Year FTE	FY 26-27	FY 27-28	FY 28-29	FY 29-30	Status
Review Independent Study Program to recover enrollment	Revenue	Indirect	—	–	—	—	—	—	—	Impl.
Establish Community Wellness and Attendance (CWA) Department	FTE Addition	($500,000)	—	–	2.0	($500,000)	($500,000)	($500,000)	($500,000)	Ongoing
Departmental reorganization — eliminate 1 AS, restructure directors	FTE Reduction	$350,000	—	–	(1.0)	—	$350,000	$350,000	$350,000	Ongoing
Full implementation of MTSS model	Process	Indirect	—	–	–	—	—	—	—	Impl.
Special Education program reduction 18% → 16% via MTSS	Cost Savings	up to $2M/yr	—	–	–	–	$1,000,000	$1,500,000	$2,000,000	Ongoing
Launch fee-based pre-K program (3 sites, ~60 students)	Revenue	—	$400,000	($300,000)	–	($300,000)	$400,000	$400,000	$400,000	Ongoing
Strategic master schedule review — secondary pathways and enrollment minimums	Cost Savings	TBD	—	—	—	—	—	—	—	Ongoing
FACILITIES OPTIMIZATION										
School facilities optimization and consolidation (pending Enrollment Committee)	Cost Savings	$500,000	—	—	—	—	$1,000,000	$1,500,000	$1,500,000	Ongoing
Facility use fees — implement Civic Center Act revenue program	Revenue	—	$20,000	–	–	$20,000	$20,000	$20,000	$20,000	Ongoing
ESTIMATED TOTALS	–	$3,416,600	$420,000	$4,625,000	(35.0)	$3,210,000	$7,647,000	$8,693,000	$9,998,000	—

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Unrestricted Fund Balance — Reserve Utilization[9]

UNRESTRICTED FUND BALANCE						
	FY24-25	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30
Beginning F01 UR Fund Balance	$57,535,806	$51,555,304	$44,201,748	$36,405,482	$32,111,020	$28,595,822
Deficit Spending	$5,977,502	$7,353,556	$7,796,266	$4,294,462	$3,515,198	$2,654,722
Ending F01 UR Fund Balance	**$51,558,304**	**$44,201,748**	**$36,405,482**	**$32,111,020**	**$28,595,822**	**$25,941,100**
Source	UAA 24-25	2025-26 2nd Interim Report				

FUND BALANCE COMPONENTS						
	FY24-25	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30
Min State Reserve 3%	$4,525,700	$4,774,339	$4,479,034	$4,468,511	$4,530,809	$4,602,234
Non-Spendable	$39,427,389	$39,427,389	$31,926,448	$27,642,509	$24,065,013	$21,338,866
Assigned Reserve — Economic Uncertainties	*$19,020,558*	*$11,627,389*	*$4,126,448*	*($157,491)*	*($3,734,987)*	*($6,461,134)*
Committed Fund Balance	*$27,800,000*	*$27,800,000*	*$27,800,000*	*$27,800,000*	*$27,800,000*	*$27,800,000*
Technology Infrastructure Refresh & Security	*$7,800,000*	*$7,800,000*	*$7,800,000*	*$7,800,000*	*$7,800,000*	*$7,800,000*
Textbook Adoption	*$8,000,000*	*$8,000,000*	*$8,000,000*	*$8,000,000*	*$8,000,000*	*$8,000,000*
Budget Stabilization	*$12,000,000*	*$12,000,000*	*$12,000,000*	*$12,000,000*	*$12,000,000*	*$12,000,000*

[9]Budget estimates for outyear fund balance projections do not include negotiated settlements with labor groups. For reference, a 1% salary increase is approximately $1.1M (ongoing).

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ESTIMATED COSTS, SAVINGS AND REVENUE CHANGES						
Scenario			**FY26-27**	**FY27-28**	**FY28-29**	**FY29-30**
All Recommendations			$3,210,000	$7,647,000	$8,693,000	$9,998,000
Without Attendance Recovery Initiative			$2,270,000	$6,267,000	$6,433,000	$6,858,000
Without School Consolidation				$6,647,000	$7,193,000	$8,498,000
Without MTSS / Special Education Initiative				$6,647,000	$7,193,000	$7,998,000

FUND BALANCE PROJECTIONS — SCENARIO ANALYSIS						
All Recommendations						
	FY24-25	**FY25-26**	**FY26-27**	**FY27-28**	**FY28-29**	**FY29-30**
Beginning F01 UR Fund Balance	**$57,535,806**	**$51,555,304**	**$44,201,748**	**$39,615,482**	**$42,968,020**	**$48,145,822**
Original Deficit Spending Estimate	$5,977,502	$7,353,556	$7,796,266	$4,294,462	$3,515,198	$2,654,722
Deficit Spending Adjustment			$3,210,000	$7,647,000	$8,693,000	$9,998,000
New Estimated Deficit Spending			$4,586,266	($3,352,538)	($5,177,802)	($7,343,278)
Prior UR Fund Balance	$51,558,304	$44,201,748	$36,405,482	$32,111,020	$28,595,822	$25,941,100
New Est. Ending F01 UR Fund Balance	**$51,558,304**	**$44,201,748**	**$39,615,482**	**$42,968,020**	**$48,145,822**	**$55,489,100**

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Without Attendance Recovery Initiative						
	FY24-25	**FY25-26**	**FY26-27**	**FY27-28**	**FY28-29**	**FY29-30**
Beginning F01 UR Fund Balance	**$57,535,806**	**$51,555,304**	**$44,201,748**	**$38,675,482**	**$37,142,482**	**$35,775,482**
Original Deficit Spending Estimate	$5,977,502	$7,353,556	$7,796,266	$7,800,000	$7,800,000	$7,800,000
Deficit Spending Adjustment			$2,270,000	$6,267,000	$6,433,000	$6,858,000
New Estimated Deficit Spending			$5,526,266	$1,533,000	$1,367,000	$942,000
Prior UR Fund Balance	$51,558,304	$44,201,748	$36,405,482	$32,111,020	$28,595,822	$25,941,100
New Est. Ending F01 UR Fund Balance	**$51,558,304**	**$44,201,748**	**$38,675,482**	**$37,142,482**	**$35,775,482**	**$34,833,482**

Without School Consolidation						
	FY24-25	**FY25-26**	**FY26-27**	**FY27-28**	**FY28-29**	**FY29-30**
Beginning F01 UR Fund Balance	**$57,535,806**	**$51,555,304**	**$44,201,748**	**$39,615,482**	**$41,968,020**	**$45,645,822**
Original Deficit Spending Estimate	$5,977,502	$7,353,556	$7,796,266	$4,294,462	$3,515,198	$2,654,722
Deficit Spending Adjustment			$3,210,000	$6,647,000	$7,193,000	$8,498,000
New Estimated Deficit Spending			$4,586,266	($2,352,538)	($3,677,802)	($5,843,278)
Prior UR Fund Balance	$51,558,304	$44,201,748	$36,405,482	$32,111,020	$28,595,822	$25,941,100
New Est. Ending F01 UR Fund Balance	**$51,558,304**	**$44,201,748**	**$39,615,482**	**$41,968,020**	**$45,645,822**	**$51,489,100**

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Without MTSS / Special Education Initiative						
	FY24-25	**FY25-26**	**FY26-27**	**FY27-28**	**FY28-29**	**FY29-30**
Beginning F01 UR Fund Balance	**$57,535,806**	**$51,555,304**	**$44,201,748**	**$39,615,482**	**$41,968,020**	**$45,645,822**
Original Deficit Spending Estimate	$5,977,502	$7,353,556	$7,796,266	$4,294,462	$3,515,198	$2,654,722
Deficit Spending Adjustment			$3,210,000	$6,647,000	$7,193,000	$7,998,000
New Estimated Deficit Spending			$4,586,266	($2,352,538)	($3,677,802)	($5,243,278)
Prior UR Fund Balance	$51,558,304	$44,201,748	$36,405,482	$32,111,020	$28,595,822	$25,941,100
New Est. Ending F01 UR Fund Balance	**$51,558,304**	**$44,201,748**	**$39,615,482**	**$41,968,020**	**$45,645,822**	**$50,889,100**

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Implementation Roadmap

	Short-Term (0–6 Months)	Mid-Term (6–18 Months)	Long-Term (18+ Months)
Human Resources	• Launch monthly HR–Fiscal position control reconciliation meeting • Design vacancy management protocol with decision criteria • Standardize onboarding & separation workflows • Develop workforce dashboards for vacancies, leaves, funding sources	• Review instructional aide staffing patterns; consolidate fragmented assignments • Implement integrated leave and vacancy reporting tools • Establish staffing allocation calendar aligned to enrollment cycles • Initiate ~14 FTE reduction (elementary), ~9 FTE reduction (high school); add ~6 FTE (middle)	• Develop multi-year staffing alignment plan tied to enrollment projections • Integrate HR workforce projections into long-range financial planning • Build workforce analytics models for compensation and pension forecasting • Adopt formal structural balance board policy
Technology	• Issue RFP for VoIP replacement (~$70K/yr savings) • Audit 170+ third-party app licenses for redundancy and non-use • Implement software usage monitoring (ClassLink / GoGuardian) • Complete full hardware inventory by site • Review Typing.com (~$13.8K) and KAMI (~$2.8K) contracts	• Finalize AI Acceptable Use Policy; integrate into professional development • Develop funded 5-year device refresh plan aligned with Measure C bond • Pursue STEAM Labs COOR Fund grant ($2M potential) • Evaluate grades 5–12 transition to 1:1 take-home device model • Complete VoIP implementation; evaluate OPS module exclusion (~$345K savings)	• Execute 5-year device refresh; roll out 1:1 districtwide • Expand smart irrigation to all sites ($50K–$100K/yr savings) • Embed software governance as annual standing process (IT + Instruction) • Integrate technology planning into annual budget development calendar

	Short-Term (0–6 Months)	**Mid-Term** (6–18 Months)	**Long-Term** (18+ Months)
Maintenance & Operations	• Freeze general maintenance hiring; eliminate vacant grounds position • Adopt 2-role management structure: Director + Operations Manager • Reclassify one foreman as working Night Lead • Establish on-call contract bench (roofing, painting, locksmith) • Launch work-order triage dashboard (life-safety, instructional, routine)	• Reduce maintenance field staff from 13.0 to 9.0 FTE through attrition • Standardize East/West route schedules; implement single dispatch queue • Redeploy custodial staff from over-benchmarked to under-benchmarked sites • Adjust contract mix; reduce overtime as headcount approaches benchmark	• Implement preventive maintenance calendar; conduct quarterly reviews • Capture remaining custodial reductions via vacancy management • Reassess work-order metrics against defined service-level targets
Business Services	• Finalize and distribute standardized purchasing & budget protocols • Enforce internal controls for petty cash at all sites • Conduct budget alignment meetings with Business Services for every site • Establish baseline metrics: PO turnaround time, budget variance, exceptions	• Redesign PO/requisition workflow; target sub-1-week processing • Establish formal facility use fee structure (documented, publicly communicated) • Establish cross-department coordination cadence (Business, HR, Instruction) • Draft multi-year deficit spending reduction plan incorporating results from department analysis and cost reductions	• Execute deficit spending reduction plan with full site fidelity • Develop structured long-term OPEB funding strategy • Embed fiscal leadership into site-based decision-making • Data dashboards in active use: enrollment, ADA, spending, staffing ratios • Expand facility rentals (Civic Center Act)
Instructional Services	• Freeze non-essential hiring; conduct full position control audit	• Plan for school consolidation plan (close 2–4 sites)	• Develop districtwide instructional framework,

	Short-Term (0–6 Months)	**Mid-Term** (6–18 Months)	**Long-Term** (18+ Months)
	• Assign dedicated Attendance Lead with full system ownership • Protect and redefine MTSS coordinator roles (remove from admin duties) • Launch homeschool & Independent Study outreach initiative • Add PBIS Coordinator and Math TOSA (K–12)	• Complete full Tier I–III MTSS system implementation • Plan for program-based enrollment strategy (STEM, CTE, dual language, IS Academy) • Plan for fee-based preschool to build TK/K pipeline and revenue • Restructure IS leadership to single TK–12 Assistant Superintendent • Develop systematic attendance improvement plan with ADA recovery targets	Instructional vision and strategic plan • Pursue grants/partnerships • Launch, if feasible, fee-based independent preschool program.
Special Education	• Conduct SLP caseload compliance review (current avg 64 vs. 55 statutory max) • Correct transportation budget misallocation (general costs moved to general fund) • Assign formal MTSS/PBIS leadership ownership districtwide • Initiate OT in-house cost-benefit analysis ($800K/yr NPA contract) • Provide Special Services staff with access to budget balances	• Launch full MTSS and PBIS implementation; universal screening and tiered protocols • Systematically review special education eligibility to address 18% identification rate • Update Section 504 processes; train administrators and teachers • Begin licensed health staff transition (phase out unlicensed health technicians) • Evaluate transition of OT services to in-house model	• Execute multi-year staffing plan aligned to reduced identification rates • Realign SELPA Director role scope; evaluate transition to Student Services Director • Evaluate and expand preschool program hours; explore fee-based general ed preschool • Embed annual program evaluation cycles into department planning calendar

Appendix A

FCMAT Fiscal Health Risk Analysis Self-Study

Fiscal Health Risk Analysis

FCMAT
FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM

Last revision: November 2024

District: Morongo Unified School District

Risk Level
High

The Fiscal Crisis and Management Assistance Team (FCMAT) has developed the Fiscal Health Risk Analysis (FHRA) as a tool to help evaluate a school district's fiscal health and risk of insolvency in the current and two subsequent fiscal years.

The FHRA includes 20 sections, each of which contains specific questions. **In this Excel file, every question in every section must be answered with a "Yes," "No," or "N/A" for the risk level to be accurate.** Unanswered questions will be counted as "no" answers and thus will raise a district's risk. Also included on a separate tab are the documents that might be reviewed to assess specific questions.

Each section and specific question is included based on FCMAT's work since the inception of AB 1200 in 1991; they are the common indicators of risk or potential insolvency for districts that have neared insolvency and needed assistance from outside agencies. Each section of this analysis is critical, and lack of attention to these critical areas will eventually lead to a district's failure. **The analysis focuses on essential functions and processes to determine the level of risk at the time of assessment.**

The greater the number of "No" answers to the questions in the analysis, the greater the potential risk of insolvency or fiscal issues for the district. Not all sections in the analysis and not all questions within each section carry equal weight; some areas carry higher risk and thus count more heavily in calculating a district's fiscal stability.

Identifying issues early is the key to maintaining fiscal health. Diligent planning will enable a district to better understand its financial objectives and strategies to sustain a high level of fiscal efficiency and overall solvency. A district should consider completing the FHRA annually to assess its own fiscal health risk and progress over time.

The following sections on this tab are automatically populated by answers given on the FHRA Questions tab and identify conditions that create significant risk of fiscal insolvency. The existence of an identified budget or fiscal status indicated by a "No" or a material weakness indicated by an "No" in the following sections supersedes all other scoring and will elevate the district's risk level.

		Response
Budget and Fiscal Status: Is district currently *without* the following?:		
•	Disapproved budget.	Yes
•	Negative interim report certification.	Yes
•	Three consecutive qualified interim report certifications.	Yes
•	Downgrade of an interim certification by the county superintendent.	Yes
•	Lack of going concern designation.	Yes
Material weakness questions:		
2.5	Has the district's budget been approved unconditionally by September 15th by the county superintendent of schools in the current and prior two fiscal years?	Yes
3.4	Following board approval of collective bargaining agreements, does the district make necessary budget revisions in the financial system to reflect settlement costs in accordance with EC 42142?	Yes
3.6	Has the district addressed any deficiencies the county superintendent of schools has identified in its oversight letters to the district in the most recent and prior two fiscal years?	Yes
4.3	Does the district forecast its general fund cash flow for the current and subsequent year and update it as needed to ensure cash flow needs are known?	Yes
4.4	If the district's cash flow forecast shows insufficient cash in its general fund to support its current and projected obligations, does the district have a reasonable plan to meet its cash flow needs for the current and subsequent year?	N/A
		Response
5.2	Has the district fulfilled, and does it have evidence showing fulfillment of, its oversight responsibilities in accordance with EC 47604.32?	N/A
5.3	Are all charters authorized by the district going concerns and not in fiscal distress?	N/A
6.3	Does the district accurately quantify the effects of collective bargaining agreements and include complete disclosure documents that show the impact on its budget and multiyear projections?	Yes

6.4	Based on the presettlement analysis, did the district identify related costs or savings, and did it identify ongoing revenue sources or expenditure reductions to support the agreement in the current and subsequent years?	Yes
7.2	If the district has deficit spending in funds other than the general fund, has it included in its multiyear projection sufficient transfers from the unrestricted general fund to cover any projected negative fund balance?	N/A
8.3	If the district has deficit spending in the current or two subsequent fiscal years, has the board approved and implemented a plan to reduce and/or eliminate deficit spending to ensure fiscal solvency?	No
10.5	Are the district's enrollment projections and assumptions based on historical data, industry-standard methods, and other reasonable factors?	Yes
11.2	Does the district have sufficient and available resources to cover all contracted obligations for capital facilities projects?	Yes
12.1	Is the district able to maintain the minimum reserve for economic uncertainties in the current year (including Fund 01 and Fund 17) as defined by the State Standards and Criteria for Fiscal Solvency?	Yes
12.2	Is the district able to maintain the minimum reserve for economic uncertainties in the two subsequent years?	Yes
12.3	If the district is not able to maintain the minimum reserve for economic uncertainties, does the district's multiyear projection include a board-approved plan to restore the reserve?	N/A
19.1	Does the district account for all positions and costs (including substitutes, overtime, stipends, and employer-paid benefits) in position control?	Yes

Score Breakdown by Section:

Note: Category values will display after all questions are answered with a "Yes," "No" or "N/A" from the dropdown menu.
Because the score is not calculated by category, category values provided are subject to minor rounding error and are for information only.

1.	Annual Independent Audit Report	0.2%
2.	Budget Development and Adoption	0.6%
3.	Budget Monitoring and Updates	0.0%
4.	Cash Management	0.0%
5.	Charter Schools	0.0%
6.	Collective Bargaining Agreements	1.2%
7.	Contributions and Transfers	0.0%
8.	Deficit Spending (Unrestricted General Fund)	3.6%
9.	Employee Benefits	0.0%
10.	Enrollment and Attendance	0.0%
11.	Facilities	0.0%
12.	Fund Balance and Reserve for Economic Uncertainties	1.0%
13.	General Fund – Current Year	0.0%
14.	Information Systems and Data Management	0.0%
15.	Internal Controls and Fraud Prevention	0.0%
16.	Leadership and Stability	1.0%
17.	Multiyear Projections	0.0%
18.	Non-Voter-Approved Debt and Risk Management	0.0%
19.	Position Control	2.0%
20.	Special Education	0.4%
	Combined Section Score: Low < 24.9% Moderate 25-39.9% High 40% <	**10.0%**

District Fiscal Solvency Risk Level, all FHRA factors The existence of any condition from the "Budget and Fiscal Status" section, and/or a material weakness as described above, will supersede the combined section score because it elevates the district's risk level.	**High**

Fiscal Health Risk Analysis

Last revision: November 2024

FCMAT
FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM

District: ***Morongo Unified School District*** **Risk Level: High**

		Response
Budget and Fiscal Status: Is the district currently *without* the following?:		
•	Disapproved budget.	**Yes**
•	Negative interim report certification.	**Yes**
•	Three consecutive qualified interim report certifications.	**Yes**
•	Downgrade of an interim certification by the county superintendent.	**Yes**
•	Lack of going concern designation.	**Yes**
1.	**Annual Independent Audit Report**	
1.1	Has the district recorded findings from the most recent and prior two years' audits without negatively affecting its fiscal health?	**No**
1.2	Has the audit report for the most recent fiscal year been completed and presented to the governing board within the statutory timeline per Education Code (EC) 41020?	**Yes**
1.3	Were the district's most recent and prior two audit reports free of findings of material weakness?	**Yes**
1.4	Has the district corrected all audit findings from the most recent and prior two audits?	**Yes**
2.	**Budget Development and Adoption**	
2.1	Does the district develop and use written budget assumptions and multiyear projections that are reasonable, are aligned with the county superintendent of schools' instructions, and have been clearly articulated?	**Yes**
2.2	Does the district use a budget development method other than a prior-year rollover budget, and if so, does that method include tasks such as reviewing prior year estimated actuals by major object code and removing one-time revenues and expenses?	**Yes**
2.3	Does the district use position control data for budget development?	**Yes**
2.4	Does the district calculate its Local Control Funding Formula (LCFF) revenue correctly?	**Yes**
2.5	Has the district's budget been approved unconditionally by September 15th by the county superintendent of schools in the current and prior two fiscal years?	**Yes**
2.6	Does the budget development process include input from staff, administrators, the governing board, the community, and the budget advisory committee (if there is one)?	**Yes**
2.7	Does the district budget and expend restricted funds before unrestricted funds?	**Yes**
2.8	Have the district's Local Control and Accountability Plan (LCAP) and budget been adopted within the statutory timelines established by EC 42103 and filed with the county superintendent of schools no later than five days after adoption or by July 1, whichever occurs first, for the current and prior fiscal year?	**Yes**
2.9	Has the district refrained from including carryover funds in its adopted budget?	**Yes**
2.10	Other than objects in the 5700s and 7300s, does the district avoid using negative expense or contra expenditure accounts in its budget?	**Yes**
2.11	Does the district have and follow a documented standard procedure for evaluating both the proposed acceptance of grants and other restricted funds and the potential multiyear impact on the district's unrestricted general fund?	**No**
2.12	Does the district adhere to a budget calendar that includes statutory due dates, major budget development tasks and deadlines, and the staff members and departments responsible for completing them?	**Yes**
3.	**Budget Monitoring and Updates**	
3.1	Are actual revenues and expenses consistent with the most current budget?	**Yes**
3.2	Are budget revisions posted in the financial system at each interim reporting period, at a minimum?	**Yes**

		Response
3.3	Are clearly written and articulated budget assumptions that support budget revisions communicated to the governing board at each interim reporting period, at a minimum?	**Yes**
3.4	Following board approval of collective bargaining agreements, does the district make necessary budget revisions in the financial system to reflect settlement costs in accordance with EC 42142?	**Yes**
3.5	Do the district's responses fully explain the variances identified in the SACS Criteria and Standards Review form?	**Yes**
3.6	Has the district addressed any deficiencies the county superintendent of schools has identified in its oversight letters to the district in the most recent and prior two fiscal years?	**Yes**
3.7	Does the district prohibit processing of requisitions or purchase orders when the budget is insufficient to support the expenditure?	**Yes**
3.8	Does the district encumber funds for salaries and benefits and adjust those encumbrances as needed?	**Yes**
3.9	For the most recent and prior two fiscal years, have the district's interim financial reports and unaudited actuals been adopted and filed with the county superintendent of schools within the timelines established in Education Code?	**Yes**

4. Cash Management

4.1	Are accounts held by the county treasurer reconciled with the district’s and county office of education's (COE) reports monthly?	**Yes**
4.2	Does the district reconcile all bank (cash and cash equivalent) accounts with each statement in a timely manner?	**Yes**
4.3	Does the district forecast its general fund cash flow for the current and subsequent year and update it as needed to ensure cash flow needs are known?	**Yes**
4.4	If the district’s cash flow forecast shows insufficient cash in its general fund to support its current and projected obligations, does the district have a reasonable plan to meet its cash flow needs for the current and subsequent year?	**N/A**
4.5	Does the district have sufficient cash resources in its other funds to support its current and projected obligations in those funds?	**Yes**
4.6	If the district uses interfund borrowing, is it complying with EC 42603?	**Yes**
4.7	If the district is managing cash in any fund(s) through external borrowing, does the district's cash flow projection include repayment based on the terms of the loan agreement?	**N/A**

5. Charter Schools

5.1	Does the district have a board policy, memorandum of understanding (MOU), or other written document(s) regarding charter oversight?	**Yes**
5.2	Has the district fulfilled, and does it have evidence showing fulfillment of, its oversight responsibilities in accordance with EC 47604.32?	**N/A**
5.3	Are all charters authorized by the district going concerns and not in fiscal distress?	**N/A**
5.4	Has the district identified specific employees in its various departments (e.g., human resources, business, instructional, and others) to be responsible for oversight of all approved charter schools?	**N/A**
5.5	Does the district monitor charter school audits for timeliness, completeness, and exceptions?	**N/A**

6. Collective Bargaining Agreements

6.1	Has the district settled with all its bargaining units for the past two fiscal years?	**Yes**
6.2	Has the district settled with all its bargaining units for the current year?	**No**
6.3	Does the district accurately quantify the effects of collective bargaining agreements and include complete disclosure documents that show the impact on its budget and multiyear projections?	**Yes**

		Response
6.4	Based on the presettlement analysis, did the district identify related costs or savings, and did it identify ongoing revenue sources or expenditure reductions to support the agreement in the current and subsequent years?	**Yes**
6.5	In the current and prior two fiscal years, has the total cost of the district's bargaining agreement settlements, including step-and-column increases, been at or under the funded cost-of-living adjustment (COLA)?	**No**
6.6	If settlements have not been reached in the past two years, has the district identified resources to cover the costs of the district's proposal(s)?	**N/A**
6.7	Did the district comply with public disclosure requirements under Government Code 3540.2 and 3547.5, and EC 42142?	**Yes**
6.8	Did the superintendent and chief business official (CBO) certify the public disclosure of collective bargaining agreement before board approval?	**Yes**
6.9	Is the governing board’s action consistent with the superintendent’s and CBO’s certification?	**Yes**

7. Contributions and Transfers

7.1	Does the district have an active, board-approved plan to eliminate, reduce or control any contributions/transfers from its unrestricted general fund to other restricted programs and funds?	**N/A**
7.2	If the district has deficit spending in funds other than the general fund, has it included in its multiyear projection sufficient transfers from the unrestricted general fund to cover any projected negative fund balance?	**N/A**
7.3	If any contributions or transfers were required for restricted programs and/or other funds in either of the prior two fiscal years, and there is a need in the current year, did the district budget for them at reasonable levels?	**Yes**

8. Deficit Spending (Unrestricted General Fund)

8.1	Is the district avoiding deficit spending in the current fiscal year?	**No**
8.2	Is the district projected to avoid deficit spending in both of the two subsequent fiscal years?	**No**
8.3	If the district has deficit spending in the current or two subsequent fiscal years, has the board approved and implemented a plan to reduce and/or eliminate deficit spending to ensure fiscal solvency?	**No**
8.4	Has the district decreased deficit spending over the past two fiscal years and is there evidence of this in its unaudited actuals reports?	**No**

9. Employee Benefits

9.1	Has the district completed an actuarial valuation in accordance with Governmental Accounting Standards Board requirements to determine its unfunded liability for other post-employment benefits (OPEB)?	**Yes**
9.2	Does the district have a plan to fund its OPEB liabilities for the current and two subsequent years such that the total of annual required service payments (whether legally or contractually required, or locally defined such as pay-as-you-go premiums, trust agreement obligations, or a board-adopted commitment) are no greater than 2% of the district’s unrestricted general fund revenues?	**Yes**
9.3	Within the last five years, has the district conducted a verification and determination of eligibility for benefits for all active and retired employees and dependents?	**Yes**
9.4	Does the district track, reconcile and report employees’ compensated leave balances?	**Yes**
9.5	Has the district followed a policy or collectively bargained agreement to limit accrued vacation balances?	**Yes**

10. Enrollment and Attendance

10.1	Has the district’s enrollment been increasing or remained stable for the current and prior two years?	**Yes**
10.2	Does the district monitor and analyze enrollment and average daily attendance (ADA) data at least monthly through the second attendance reporting period (P-2)?	**Yes**
10.3	Does the district track historical enrollment and ADA data to project future trends?	**Yes**

		Response
10.4	Do schools maintain an accurate record of daily enrollment and attendance that is reconciled monthly at the school and district levels?	**Yes**
10.5	Are the district's enrollment projections and assumptions based on historical data, industry-standard methods, and other reasonable factors?	**Yes**
10.6	Has the district planned for enrollment losses to any charter schools?	**N/A**
10.7	Do all applicable schools and departments review and verify their respective California Longitudinal Pupil Achievement Data System (CALPADS) data and correct it as needed before the report submission deadlines?	**Yes**
10.8	Has the district certified its CALPADS data (most recent Fall 1, Fall 2, and end-of-year reports) by the required deadlines?	**Yes**
10.9	Does the district follow established board policy to limit outgoing interdistrict transfers and ensure that only students who meet the required qualifications are approved?	**N/A**
10.10	Does the district adhere to the average TK-3 class enrollment limits at each school, the adult-to-student ratio for each TK class, and the credentialing requirements for teachers assigned to TK classes as defined in the Education Code?	**Yes**

11. Facilities

11.1	If the district participates in the state's School Facility Program, has it made the required contribution to its Routine Restricted Maintenance Account?	**Yes**
11.2	Does the district have sufficient and available resources to cover all contracted obligations for capital facilities projects?	**Yes**
11.3	Does the district properly track and account for facility-related projects?	**Yes**
11.4	Does the district use its facilities fully (districtwide) in accordance with the Office of Public School Construction's loading standards?	**Yes**
11.5	Does the district include facility needs (maintenance, repair, and operating requirements) when adopting a budget?	**Yes**
11.6	Has the district met the facilities inspection requirements of the Williams Act and resolved any outstanding issues?	**Yes**
11.7	If the district passed a Proposition 39 general obligation bond, has it met the requirements for audit, reporting, and a citizens' bond oversight committee?	**Yes**
11.8	Does the district have a board-approved long-range facilities master plan completed within the last five years that reflects its current and projected facility needs?	**Yes**

12. Fund Balance and Reserve for Economic Uncertainties

12.1	Is the district able to maintain the minimum reserve for economic uncertainties in the current year (including Fund 01 and Fund 17) as defined by the State Standards and Criteria for Fiscal Solvency?	**Yes**
12.2	Is the district able to maintain the minimum reserve for economic uncertainties in the two subsequent years?	**Yes**
12.3	If the district is not able to maintain the minimum reserve for economic uncertainties, does the district's multiyear projection include a board-approved plan to restore the reserve?	**N/A**
12.4	Is the district's projected unrestricted fund balance stable or increasing in the two subsequent fiscal years without unsubstantiated revenue increases or expenditure reductions?	**No**
12.5	If the district has unfunded or contingent liabilities or one-time costs other than post-employment benefits, does the unrestricted general fund balance include sufficient assigned or committed reserves above the recommended reserve level to cover these costs?	**Yes**

13. General Fund – Current Year

13.1	Does the district ensure that one-time revenues do not pay for ongoing expenditures?	**Yes**

		Response
13.2	Is the percentage of the district's general fund unrestricted expenditure budget that is allocated to salaries and benefits at or below the prior year statewide average?	**Yes**
13.3	Is the percentage of the district's general fund unrestricted expenditure budget that is allocated to salaries and benefits at or below that of the prior two years?	**Yes**
13.4	If the district has received any uniform complaints or legal challenges regarding local use of supplemental and concentration grant funding in the current or prior two years, is the district addressing the complaint(s)?	**N/A**
13.5	For positions supported with one-time or restricted dollars, does the district either ensure that these funds are sufficient to pay for these staff or have a plan to pay for the positions with unrestricted funds?	**Yes**
13.6	Is the district using its restricted dollars fully by expending allocations for restricted programs within the required time?	**Yes**
13.7	Does the district account for all program costs, including the maximum allowable indirect costs, for each restricted resource and other funds?	**Yes**
13.8	Are all balance sheet accounts in the general ledger reconciled at least at each interim report and at year-end close?	**Yes**

14. Information Systems and Data Management

14.1	Does the district use an integrated financial and human resources system?	**Yes**
14.2	Does the district use the system(s) to provide key financial and related data, including personnel information, to help the district make informed decisions?	**Yes**
14.3	Has the district accurately identified students who are eligible for free or reduced-price meals, English learners, and foster youth, in accordance with the LCFF and its LCAP?	**Yes**
14.4	Is the district using the same financial system as its COE?	**Yes**
14.5	If the district is using a separate financial system from its COE, is there an automated interface that allows data to be sent and received by both the district's and COE's financial systems?	**N/A**
14.6	If the district is using a separate financial system from its COE, has the district provided the COE with direct access so the COE can provide oversight, review and assistance?	**N/A**

15. Internal Controls and Fraud Prevention

15.1	Does the district have controls that limit access to its financial system and include multiple levels of authorization?	**Yes**
15.2	Are the district's financial system's access and authorization controls reviewed and updated upon employment actions (e.g., resignations, terminations, promotions, or demotions) and at least annually?	**Yes**
15.3	Does the district ensure that duties in the following areas are segregated, and that they are supervised and monitored?:	
	• Accounts payable (AP).	**Yes**
	• Accounts receivable (AR).	**Yes**
	• Purchasing and contracts.	**Yes**
	• Payroll.	**Yes**
	• Human resources (i.e., duties related to position control and payroll processes).	**Yes**
15.4	Are beginning balances for the new fiscal year posted and reconciled with the ending balances for each fund from the prior fiscal year?	**Yes**
15.5	Does the district review and work to clear prior year accruals throughout the year?	**Yes**
15.6	Has the district reconciled and closed the general ledger (books) within the time prescribed by the county superintendent of schools?	**Yes**
15.7	Does the district have processes and procedures to discourage and detect fraud?	**Yes**
15.8	Does the district have a process for collecting reports of possible fraud (such as an anonymous fraud reporting hotline) and for following up on such reports?	**Yes**

		Response
15.9	Does the district have an internal audit process?	**Yes**

16. Leadership and Stability

16.1	Does the district have a CBO who has been in this position with the district for more than two years?	**No**
16.2	Does the district have a superintendent who has been in this position with the district for more than two years?	**Yes**
16.3	Does the superintendent schedule and hold meetings regularly with all members of their administrative cabinet?	**Yes**
16.4	Is training on financial management and budget provided to school and department administrators who are responsible for budget management?	**Yes**
16.5	Does the governing board adopt and revise policies and administrative regulations annually?	**Yes**
16.6	Are newly adopted or revised policies and administrative regulations implemented, communicated, and available to staff?	**Yes**
16.7	Do all board members attend training on the budget and governance at least every two years?	**Yes**
16.8	Is the superintendent's evaluation performed according to the terms of the contract?	**Yes**
16.9	Is the district avoiding relying on consultants to prepare financial reports (e.g. SACS) or other primary fiscal activities?	**Yes**

17. Multiyear Projections

17.1	Has the district developed multiyear projections that include detailed assumptions aligned with industry standards?	**Yes**
17.2	To help calculate its multiyear projections, did the district prepare an accurate LCFF calculation that includes multiyear considerations?	**Yes**
17.3	Does the district use its most current multiyear projection when making financial decisions?	**Yes**
17.4	If the district uses a broad adjustment category in its multiyear projection (such as line B10, B1d, B2d Other Adjustments, in the SACS Form MYP/MYPI), is there a detailed list of what is included in the adjustment amount and are the adjustments reasonable?	**Yes**

18. Non-Voter-Approved Debt and Risk Management

18.1	Are the sources of repayment for non-voter-approved debt (such as certificates of participation [COPs], bridge financing, bond anticipation notes [BANS], revenue anticipation notes [RANS] and others) stable, predictable, and other than the unrestricted general fund?	**N/A**
18.2	If the district has issued non-voter-approved debt, has its credit rating remained stable or improved during the current and prior two fiscal years?	**N/A**
18.3	If the district is self-insured, has it completed an actuarial valuation as required and does it have a plan to pay for any unfunded liabilities?	**N/A**
18.4	If the district has non-voter-approved debt (such as COPs, bridge financing, BANS, RANS and others), is the total of annual debt service payments no greater than 2% of the district's unrestricted general fund revenues?	**N/A**

19. Position Control

19.1	Does the district account for all positions and costs (including substitutes, overtime, stipends, and employer-paid benefits) in position control?	**Yes**
19.2	Does the district analyze and adjust staffing based on staffing ratios and enrollment?	**Yes**
19.3	Does the district reconcile budget, payroll and position control regularly, at least at budget adoption and interim financial reporting periods?	**Yes**
19.4	Does the district identify a budget source for each new position before the position is authorized by the governing board?	**Yes**

		Response
19.5	Does the governing board approve all new positions and extra assignments (e.g., stipends) before positions are posted?	**No**
19.6	Do managers and staff responsible for the district's human resources, payroll and budget functions meet at least monthly to discuss issues and improve processes?	**No**

20. Special Education

20.1	For special education classrooms and support services, does the district use staffing ratios that align with statutory requirements and industry standards, and are students' support needs also considered? If so, are those needs documented and evaluated at each budget cycle?	**Yes**
20.2	Does the district access all available funding sources for costs related to special education (e.g., state excess cost pool, legal fees, mental health)?	**Yes**
20.3	Does the district use appropriate tools to help it make informed decisions about whether to add services (e.g., special circumstance instructional assistance process and form, transportation decision tree)?	**No**
20.4	Does the district budget and account correctly for all costs related to special education (e.g., transportation, due process hearings, indirect costs, nonpublic schools and/or nonpublic agencies)?	**Yes**
20.5	Does the district monitor contributions from the unrestricted general fund and adjust to trends in the special education program?	**Yes**
20.6	Is the district's rate of identification of students as eligible for special education at or below the countywide and statewide average rates?	**Yes**
20.7	Does the district analyze whether it will meet the maintenance of effort requirement at each interim financial reporting period?	**Yes**

Risk Score. 20 numbered sections onlv: **10.0%**

District Fiscal Solvency Risk Level, all FHRA factors (The existence of any condition from the "Budget and Fiscal Status" section, and/or a material weakness as described in the Instructions & Summary tab, will supersede the score above because it elevates the district's risk level.)	**High**

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