Funding Allocation Plan & Procedures

2026-27

San Luis Obispo County
Special Education Local Plan Area

Approved 05/29/2026, Revised 10/16/2026

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INTRODUCTION

Special Education Apportionments flow from the California Department of Education (CDE) to the Special Education Local Plan Area (SELPA) Administrative Unit (AU), the San Luis Obispo County Office of Education (SLOCOE). The San Luis Obispo SELPA (SLO SELPA) allocates State and Federal funds to the thirteen-member Local Education Agencies (LEAs) according to this Funding Allocation Plan, approved by the SELPA Governing Board and referenced in the Local Plan.

SELPA MEMBER LEAs

Almond Acres Charter Academy
Atascadero Unified School District
Bellevue Santa Fe Charter School
Cayucos Elementary School District
Coast Unified School District
Lucia Mar Unified School District
Paso Robles Joint Unified School District
Pleasant Valley Joint Unified Elementary School District
San Luis Coastal Unified School District
San Luis Obispo County Office of Education
San Miguel Joint Unified School District
Shandon Joint Unified School District
Templeton Unified School District

GUIDING PRINCIPLES

The funding plan was revisited by representatives from each of the members within the San Luis Obispo County SELPA. The intent of the plan is to provide an equitable distribution of resources based on consensus of all members and with the recognition that each has a responsibility to all students served by the SELPA, regardless of where the student is enrolled. Additionally, the revised plan attempts to be clear and specific, with allocations that have a direct and identifiable rationale. The allocations also include a level of predictability to allow members to accurately predict the impact of changes in their enrollment or pupils identified for special education services. The guiding principles of this plan are to:

- Ensure equitable distribution of expenses based on regional program usage by LEAs.
- Provide a method for Regional Program Consumers to verify approximate costs of accessing regional programs and services.
- Protect the small LEAs against unusual occurrences.
- Provide protection to Regional Program Providers from significant declining enrollment by ensuring a year and a day notification to the Regional Program Provider when a Regional Program Consumer intends to discontinue use of programs or services.
- Disallow the return of transferred classes for a period of three years. Classes will be transferred under circumstances by mutual agreement.
- Provide the Regional Program Provider flexibility to hire, release staff and design programs.
- Require predictable expenses charged for regional programs and services throughout the county.
- Ensure that specialized regional classrooms may contract for higher level of classroom/facility cleaning
- Protect the LEAs with extremely high needs
- Ensure that all the LEAs have access to a continuum of service options.
- Ensure that the LEAs share in the challenges and costs for providing a continuum of special education services that are required for students within the SELPA.

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ALLOCATION OF FUNDS TO THE LEAS

The state formula, which includes state and local revenues (special education property taxes), is used to estimate revenue. State formula special education funds received on behalf of the SELPA are distributed after direct allocations to SELPA and SELPA member LEAs based on the Average Daily Attendance year used in the state formula to generate the special education funds being distributed.

DIRECT ALLOCATIONS

- ADR Federal Grant
- Alternative Dispute Resolution (ADR)
- California Children's Services (CCS) equipment and supplies
- COE Retiree Health Benefits
- Direct Allocation to the Smalls
- Infant Funding
- LEA High-Cost Pool
- Low Incidence Support, Equipment, Materials, and Services
- Medi-Cal Administrative Activities (MAA)
- Non-Public School (NPS) Pool
- ADR Consultants/Expertise (Program Specialist contribution)
- Other Post Employee Benefits (OPEB)
- Portion of Preschool IDEA grant
- Preschool Staff Development
- Program Specialist – 2.0 FTE
- SELPA Administrative Budget
- SELPA Coordinator – 1.0 FTE
- SELPA Executive Director – 1.0 FTE
- Special Education Information System (SEIS)
- WorkAbility 1
- We Can Work

Direct Allocations-General 2026-2027							
PURPOSE	**AGENCY**	**APPROVED AMOUNT**	**RESOURCE**	**FUNDING SOURCE**	**COLA**	**FUNDING CALC/RATIONALE**	**NOTES**
SELPA Administrative Budget	SELPA	$736,015	6500	State AB 602	Yes	Includes PS/RS apportionment. Adjusted by COLA.	
ADR Consultants/ Expert	SELPA	$32,000	6500 (Obj 8990)	State AB 602	Annual Review		Contribution to the new SELPA Program Specialist for 26/27
ADR allocation (not a grant)	SELPA	$15,000	6500	State AB 602		Funds allocated to SELPA for ADR-related work	Exclusive of the ADR grant (resource 3395)
OPEB Retiree Benefits-SELPA Salaries	SLOCOE	$20,000	6500	State AB 602			Offset for lifetime retirees. Pay-as-you-go 3701/3702 object.
Special Education Information System platform (SEIS)	San Joaquin County Office of Education	$56,668	6500	State AB 602	3 year Review	Electronic IEP database access for LEAs	Full cost subject to triannual contract with San Joaquin COE
SELPA Executive Director	SELPA	$262,458	6500	State AB 602	No	Based on actual salary and statutory benefits.	Based on 2026-27 Salary & Benefits Projection
SELPA Coordinator	SELPA	$123,156	6500	State AB 602	No	Portion of actual salary and statutory benefits. Adjusted annually for step/column	An additional $69,275 is funded by ERSESS; based on Salary & Benefit Projection
COE Retiree Benefits	COE Special Ed staff retirees	$277,747 estimated	6500	State AB 602	No	Amount is estimated; actual cost is determined EOY. All SELPA grants are excluded from this calculation	Annual pay-as-you-go costs for health benefits of retirees still subject to lifetime benefits
High Cost Pool	LEAs reimbursed by application and approval	$300,000	6500	State AB 602	Annual Review	Subject to rollover of unused amounts, all LEAs contribute to the pool based on pro-rata ADA formula	For unanticipated expenses.
NPS Pool	LEA reimbursement	$186,515	6500	State AB 602	Annual Review	Prorated. Subject to roll over for unused funds.	Reimburses 50% or less of basic education costs for any SWD.
California Children's Services (CCS)	CCS	$2,000	6500 D2:1515	State AB 602	Annual Review	Materials and Supplies only	No roll over from year to year
Community Advisory Committee	SLO SELPA CAC	$1,500	9260	State AB 602	Annual Review	Events and supporting materials	No roll over from year to year

Direct Allocations-Calculated by State-Low Incidence 2026-2027							
PURPOSE	**AGENCY**	**APPROVED AMOUNT**	**RESOURCE**	**FUNDING SOURCE**	**COLA**	**FUNDING CALC/RATIONALE**	**NOTES**
Portion of Audiologist's Salary & Benefits	SLOCOE	0.20 FTE	6500	State-Low Incidence (D2: 7600)	Annual Review	Estimated: Audiologist 0.0505 FTE ($5,307) Program Specialist 0.1497 FTE ($20,669)	Position changed to combined Program Specialist/ Audiologist starting 2023-24.
Portion of Physical Therapist's Salary & Benefits	SLOCOE	0.20 FTE	6500		Annual Review	Estimated: PT 0.20 FTE ($26,488)	New position approved in April 2022.
Administrative Support	SELPA	0.08 FTE	6500		Annual Review	Originally based on amount of time spent supporting LI	SELPA Classified Coordinator salary
Low Incidence Equipment Pool	LEAs	$125,000	6500		Annual Review	Based on the highest cost year over the last 3 years. Subject to roll over for unused funds	Approved IEP related equipment is pro-rated and reimbursed from the allocated pool.
Brailling Services	SLOCOE	$10,000	6500		Annual Review	Based on historical use and projections.	Outsourced braille transcription
Braille-Textbooks	SLOCOE	$10,000	6500		Annual Review	Based on projections and known expenditures	Based on Student need. Subject to roll over for unused
Canes	SLOCOE	$660	6500		Annual Review	Based on SELPA LI Procedures Guide	Increased based on prior year actual costs/student need
Materials, maintenance, repairs	SELPA	$5,000	6500		Annual Review	Created to show transparency in current practices with LI surplus items	Established in 22-23 to account for LI related expenditures
Low Incidence-Per Student Allocation	LEAs	Fund Balance of $857,530	6500		Annual Review	Proration of fund balance allocated based on eligible student count from prior year census.	The portion of funding generated by infants (0-3) is allocated to SLOCOE.

Educationally Related Social Emotional Supports and Services (ERSESS) - Bill Backs from LEAs 2026-2027							
PURPOSE	**AGENCY**	**APPROVED AMOUNT**	**RESOURCE**	**FUNDING SOURCE**	**COLA**	**FUNDING CALC/RATIONALE**	**NOTES**
Portion of SELPA Coordinator	SELPA	$69,275	6546	State Mental Health Funds	Annual Review	0.36 FTE (1.6 days/week)	Out of County placements
Portion of Mental Health Therapist	SELPA	$132,372	6546		Annual Review	Generated by small LEA's ADA. 0.8 FTE	Mileage, cell phone stipend & materials
Mental Health Therapists	SLOCOE for Chris Jespersen	$200,000	6546		Annual Review	Subsidizes cost for 2 MHTs	Balance charged to placing LEAs
SELPA Admin Support	SELPA	$10,000	6546		Annual Review	Supports admin expenses	Coordinator travel, mileage

Direct Allocations- Grants 2026-2027							
PURPOSE	**AGENCY**	**APPROVED AMOUNT**	**RESOURCE**	**FUNDING SOURCE**	**COLA**	**FUNDING CALC/RATIONALE**	**NOTES**
SELPA Operations	SELPA	Combined 0.30 FTE Program Specialist, combined 0.375 FTE clerical, cell phone stipend and indirect costs	3310 3315	IDEA-Federal	Yes		SELPA carves out Preschool based on the 2017-18 %age of 3315 preschool revenue, 12%, with funds allocated to districts based on prior year total district enrollment
Preschool Staff Development	SELPA	$2,034	3345	IDEA-Federal	No	GAN 25-26 amount	Curriculum and/or PD for preschool programs
Medi-Cal Admin Activities (MAA)	SELPA		9052		No	Generated by SELPA's participation in random time surveys by the DHCS	Funding fluctuates; cannot reasonably estimate.
ADR Grant	SELPA	$15,157	3395	Federal	No	GAN 25-26	
Workability I	SELPA	$164,950	6520	State	No	State awarded grant	1.0 FTE & 0.625 FTE Job Placement Specialist and student wages
We Can Work	SELPA	$120,797	9008	Federal	No	26-27 Contract	New grant 2023/24

Direct Allocations- Small SELPA LEAs 2026-2027							
PURPOSE	**AGENCY**	**APPROVED AMOUNT**	**RESOURCE**	**FUNDING SOURCE**	**COLA**	**FUNDING CALC/RATIONALE**	**NOTES**
Annual Allocation	Almond Acres Charter	$177,801	6500	State AB 602	Annual Review	Prior year P2 ADA ranging from 251-999	Direct allocations are for full time LEA classroom based programs only. LEA whose primary delivery of instruction is Independent Study or Home-Study based programs are not eligible for direct allocation under this formula **SLOCOE receives allocations for both sites unrelated to student counts*
Annual Allocation	Bellevue-Santa Fe Charter	$71,120	6500	State AB 602		Prior year P2 ADA ranging from 1-250	
Annual Allocation	Cayucos ESD	$71,120	6500	State AB 602		Prior year P2 ADA ranging from 1-250	
Annual Allocation	Coast USD	$177,801	6500	State AB 602		Prior year P2 ADA ranging from 251-999	
Annual Allocation	Pleasant Valley JUESD	$71,120	6500	State AB 602		Prior year P2 ADA ranging from 1-250	
Annual Allocation	San Miguel JUSD	$177,801	6500	State AB 602		Prior year P2 ADA ranging from 251-999	
Annual Allocation	Shandon JUSD	$71,120	6500	State AB 602		Prior year P2 ADA ranging from 1-250	
Annual Allocation	SLOCOE Community	$71,120	6500	State AB 602		Prior year P2 ADA ranging from 1-250	
Annual Allocation	SLOCOE Juvenile Court	$71,120	6500	State AB 602		Prior year P2 ADA ranging from 1-250	

ANNUAL REVIEW OF SPECIFIC ITEMS
The following items, as well as the table below, are reviewed annually:

- Low Incidence Allocations
- California Children's Services budget
- Direct Allocation – Smalls
- ERSESS funding
- High-Cost Pool
- SEIS contribution
- Non-Public Schools Pool
- Ombudsperson/ADR Consultants

Annual Rates for Annual Review 2026-2027 (2.87% COLA)		
	CURRENT RATE	**NOTES**
Custodial/Maintenance	$4.88 per sq. ft. per year	Adjusted annually by COLA
Housing	$0.85 per sq. ft	Adjusted annually by COLA
Utilities	$1.52 per sq. ft per year	Adjusted annually by COLA

ALLOCATION OF FUNDS – DESCRIPTION

Other than direct allocations, all funds are distributed to the LEAs based on the state formula. Exceptions to this are:

1. Preschool Funds. LEAs who operate preschool programs receive federal grant resource 3315, based on prior year Fall CALPADs census, as well as 12% of 3310, allocated to LEAs based on the ratio of 3320 to 3310 in FY 2017-18.

2. Infant Funds. The SLO SELPA allocates Federal Part C Infant Funding and State Infant Funding to SLOCOE to operate programs for infants.
    a. The federal government authorized grants (Resource 3385) to states to plan and implement a comprehensive, community-based interagency system of early intervention services (Part C) for infants and toddlers with disabilities and their families. LEAs serving infants and toddlers with solely low-incidence disabilities are eligible.
    b. The State of California also provides discretionary funding (Resource 6515) for individuals with exceptional needs who are younger than three years of age.

3. Out of Home Care Funds. The SELPA receives AB 602 funds that include an allocation for Out-of-Home Care services to support students either considered foster youth or residing in group homes/other similar facilities located within the SELPA's geographic boundaries. CDE revised the OOHC funding formula during the 21-22 year. The SELPA allocates these funds at end of year to LEAs based on current year Census Day foster youth counts and known data regarding STRTPS, CCFs, ICFs, and SNFs using the P2 certification funding amounts. Any statewide savings listed for the SLO SELPA on the OOHC certifications will be allocated proportionally to LEAs based on their total amount of OOHC funds received. Because CDE reports on OOHC average daily attendance during the P1 certification for annual revisions (prior year), it is expected that prior year adjustments will always be necessary.

4. Educationally Related Social Emotional Services and Supports (ERSESS)/Mental Health Funds
Beginning in the 2023-2024 state budget, all state and federal ERSESS funding distribution shifted from the SELPA to LEAs. This refers to state RESC 6546 and federal RESC 3327. The SLO SELPA member LEAs executed an ERSESS MOU in Spring 2023, subject to an annual review. Funds will be transferred to SLOCOE and the SELPA in two installments on January 30 and June 1.

This transfer will be completed per the 'authorization to post' based on the LEA's contribution within the ERSESS Allocation Plan. LEAs are responsible for the processing and reporting of federal grant funding expenditures in accordance with timelines set forth by the California Department of Education.

ALLOCATION OF FUNDS – IN EXCESS

The following guidance will be used to allocate funds to LEAs when there are excess funds available in specific categories. If the current model is not sufficient to maintain sustainable SELPA operations to meet the needs of students with disabilities countywide, the SELPA will bring forth a revised proposal to amend the allocation model accordingly.

1. Low Incidence Pool. The SELPA will allocate the difference between the set-aside pool amount and the total reimbursement requested using the Low Incidence eligible student count from the prior year census by LEA. This is the same funding formula structure used in the LI Allocation model to pass funds after "Off the Top" approvals have been fulfilled. The excess funds will be distributed by June 30 annually with a fiscal bulletin notification. LEAs who have students enrolled with documented Low Incidence disabilities as of the prior year Fall census (per SEIS data pull) are eligible to receive excess funds as the funds are generated through the AB602 funding formula based on student disability category.
2. High Cost Pool. In lieu of allocation of unspent funds in the current fiscal year, the SELPA will only hold the unspent difference "off the top" in the following fiscal year. The pool will be replenished to meet the maximum funding level each fiscal year. This will be reflected in the AB602 apportionment documents produced by the SELPA at budget development, P1, and P2, sent via fiscal bulletin.
3. Non-Public School Pool. The SELPA will allocate the difference between the set-aside pool amount and the total reimbursement requested using SELPA-wide LEA prior-year P2 ADA percentages. The excess funds will be distributed by August 30th of the following FY, as invoices to close out the NPS Pool of the current year are due by August 1st, with a fiscal bulletin notification. All LEAs are eligible to receive excess funds as the pool is taken "off the top" of AB602 revenue generation.
4. Earned Interest in Fund 02. The SELPA will report out on earned interest annually on the Funding Allocation Plan and will keep the funds in fund balance as administrative support, savings for unexpected costs, and improvement in special education programming, services, and supports.
5. Earned Interest in Fund 10. The SELPA will pass any Q1-Q4 earned interest funds annually. Funds will be journal transferred from the SELPA to LEAs using prior year P2 ADA percentages. The excess funds will be distributed in the following year at P1 with a fiscal bulletin notification. All LEAs are eligible to receive Fund 10 earned interest, with the exception of SLOCOE and SELPA. If the annual earned interest is less than $10,000, the funds will be moved to Fund 02 to support SELPA administration.

POOLS

High Cost Pool $300,000	Non Public Schools Cost Pool $186,515
Reimbursement to LEAs for expenses beyond the LEA's basic continuum of services or unexpected events. Access: Written proposal and invoice submissions. 1. All claims are submitted to the SELPA annually, no later than **April 15.** 2. All claims should include relevant invoices AND a cover page describing why/how the expenses were unanticipated or and why the LEA cannot reconcile those expenses within its existing budget. 3. Claims are presented to SEOC and CBOs for discussion and recommendations prior to Governing Council action. 4. Expenses eligible for Board & Care and/or NPS pools are excluded from the claim. 5. Claims may not exceed actual excess costs and must incorporate any offset of district revenue. 6. Legal costs, parent reimbursement or LEA non-provided compensatory services are not eligible for funds from this pool. 7. A request may be made for the current fiscal year for a student placed as a result of an Inter-District Transfer (IDT) granted under appeal to the SLOCOE Board of Trustees which overturns the LEA's IDT denial. Costs of services/program minus ADA. 8. If the number of claims exceeds the available pool amount within one fiscal year, approved claims will be prorated. 9. Any LEA claim denied by the Governing Council may be resubmitted by the LEA as a request for a no interest loan from the high cost pool. Terms of the loan will be determined by the Governing Council, based on the request. The Governing Council may agree to provide some funds as a grant while requiring a portion to be repaid. 10. Approval of a claim that represents an ongoing expense is required annually. Funds are distributed at the end of the year. When a claim does not meet the criteria of being extraordinary, a proposal may be brought forward for review by the Governing Council for a waiver of the criteria.	Reimbursement to LEAs for the basic education costs associated with a Residential Treatment Center nonpublic school placement. Access: Invoice submissions. Invoices for basic education will be paid at 50% or less of the agreed rate for a student named on a signed Individual Service Agreement and a Master Contract with a NPS. Invoices for NPS student travel will be paid at 50% or less and parent travel will be paid at $1,200 or less. Funds will be distributed at the end of the year. Quarterly submissions of actuals: November 1 - period ending September 30 February 1- period ending December 30 May 1 - period ending March 30 August 1- period ending June 30 Any end-of-year balance will be carried over to the next fiscal year. No reimbursements will be approved for prior year invoices received after August 10 unless otherwise approved by the Governing Council.

BLOCK FEES

Block Fee for Programs and Services

Each Provider develops a block fee schedule that delineates the available programs, services and associated fees. Bi-annually, the provider invoices the consumer for services provided based on the Individual Service Agreement (ISA) developed and consented upon.

Block Fee Development

Determination of Full Time Equivalent (FTE) costs

- Each program/classroom type will have a separate block fee
- The FTE/quantity for each programmatic component will be determined by SEOC based on the direct services and supports to students.
- The average cost of all employees within the job classification will be used.
- The per-pupil costs will be calculated using a standardized formula of the following dividends regardless of actual class size:
    - Less Intensive/More Intensive/Preschool/Adult = 10
    - Medically Fragile = 5
    - Therapeutic Learning Center (K-8) = 8
    - Therapeutic Learning Center (9-12) = 10
- Each LEA will use the state-approved indirect cost rate
- Custodial/Maintenance/Utility costs will use the SELPA rate per square footage, adjusted by COLA annually.
- Substitute, certificated and classified, rates will use a standardized flat rate
- Material/supplies rates to be determined by SEOC
- Block fee template will be provided for use by SELPA annually in March

Billing for Programs/Classes

The Provider invoices the Consumer based on student utilization of a Provider according to each student's enrollment generated by the Provider. The Provider will give the Consumer a monthly update of attendance.

The Provider will bill the Consumer based on the following formula:

1. A cost per student per year is calculated using the Block Fee Schedule. The per student cost is multiplied by the average annual enrollment per student.
2. The Individual Service Agreement (ISA) includes a deduction based on the ADA funding generated from LCFF calculation received by the Regional Provider per student. The current year applicable LCFF base rate using the P2 ADA percentage of attendance will be used to determine the credit applied. There is no ADA credit applied for preschool students.
3. Student enrollment is charged by dividing total enrollment days by the total number of school days.
4. For students whose residence changes during a month, enrollment is charged by dividing total enrollment days by the total number of school days.
5. Extended School Year (ESY) expenses shall be invoiced separately, as determined by the Individual Service Agreement using the developed Block Fee.
6. The individual student totals for a LEA will be summed to provide a total billing for a LEA by the Provider.

A midyear invoice for the current fiscal year costs shall be reported no later than January 31 of the current year. A Final invoice for current year expenses will be provided to Consumers no later than 15 calendar days after the fiscal year concludes (by July 15).

Billing for Related Services

Costs for any Related Services will be billed to the District of Special Education Accountability. Contracts for Related Services provided directly to a LEA shall be in place no later than October 31 of the current year or 30 days after a request for services is made to a Regional Program Provider.

1. The Program Provider shall use the average cost per hour for any specific Related Service provided to determine the costs of such services as specified in the Fee for Service Schedule.
2. The Program Provider will determine an average cost of providing those services to all Program Consumers.
3. The Program Provider may include provisions for additional charges based on actual costs for individual LEAs, such as travel cost of staff and extraordinary use of time.
4. The Program Provider will report estimated costs to the Program Consumer as follows:
    a. preliminary budget development no later than April 30 for the coming fiscal year
    b. revised no later than October 31
    c. final no later than January 31 and cannot exceed 5% of the October 31 estimate
5. A midyear invoice for the current fiscal year costs shall be reported no later than January 31. A Final invoice will be provided to the Consumer no later than 15 calendar days after the fiscal year concludes (by July 15).
6. When SLOCOE is the service provider, SLOCOE will provide a monthly T-sheet of student data for related services by the 15th of each month in arrears.
7. When an LEA intends to discontinue all or part of Related Services, the LEA will provide SELPA and the Regional Program Provider a Year and a Day notice.

Billing for Non-Public School operated by Spectrum Centers, Inc.

The SELPA holds the contract with Spectrum Centers, Inc., the program operator of the local nonpublic school. The SELPA will notify via an 'authorization to post' fiscal bulletin and then journal transfer the proportionate contribution for program operation from each K-12 LEA in two installments, on January 30 and June 15 annually. Additionally, the SELPA will create individual service agreements based on student placement and invoice each LEA on January 30 and June 15 based on program seat use. Refer to the NPS Funding Model MOU for additional information.

Fee Adjustment Limitations

LEA Operated Regional Programs

The October Block Fee Adjustments shall not increase more than 7% over the prior October average program costs. The SELPA will compare current year and prior year October Block Fees to ensure there is not an excess of a 7% over the uncapped 'average class cost' for the LEA to run the program as noted on last October's Block Fees schedule submitted by the LEA.

Any Regional Program Provider who exceeds the allowable fee adjustment shall be solely responsible for any additional costs. Should a Block Fee exceed the adjustment limitations, an adjustment cap of 7% will be applied to the program costs to ensure that the fee is within the agreed upon guidelines unless both the Regional Provider and Consumer mutually agree otherwise.

SLOCOE Operated Programs
The October Block Fee Adjustments shall not increase more than 7% over the prior fiscal year per classroom cost. The SELPA will compare current year and prior year October Block Fees to ensure there is not an excess of a 7% increase in classroom costs. SLOCOE will use the average of total enrollment in each program as of January 31 for the per-pupil cost divisor. SLOCOE State-approved indirect costs will be used unless mutually agreed upon otherwise by SLOCOE and the Consumer.

Regional Programs/Classes
Regional classes shall be made available by the LEAs to ensure a full continuum of programs for students with disabilities as specified in Appendix II - Regional Programs.

Related Services
Regional Program Providers shall make available to all SELPA LEA members Related Services, according to the adopted Annual Services Plan.

Projected needs for services are based on the policies and procedures discussed under Fees for Service. Regional Program Consumers are required to inform the SELPA and Regional Program Providers, in writing, of a change of services needed no later than February 1 of the year preceding the requested service.

Billing for Out of County Student Placement within the SLO SELPA
When a non-resident student is placed in a LEA, the SELPA member LEA will invoice at the same rate as for an intra-SELPA student. The sending and receiving SELPAs will develop an Inter-SELPA agreement further defining the terms of the placement.

Billing for Foster or Unhoused Youth
Homeless Youth who receive regional services will be the responsibility of the LEA of residence during the year of identification as homeless. For Foster Youth whose residence changes during a month, the LEA in which the student resided in for the largest number of days during the month will be billed for that month.

INCURRED LEGAL EXPENSES

Legal costs incurred by a Regional Program Provider for preparation, or participation in a state complaint, due process, or court action will be paid according to Local Policy on Litigation, LP 19.7. See the SLO SELPA Litigation Policy for additional guidance.

Legal Expenses
The legal expenses associated with due process or a court case concerning students receiving contracted services from a Regional Program Provider will be the responsibility of the District of Special Education Accountability unless the specific case contains issues related to the Regional Program Provider. See the SLO SELPA Litigation Policy for additional guidance.

Disputes Involving LEAs
If a dispute should arise concerning the proposed placement, services to be provided, costs, and/or program exit, the LEAs agree to attempt to resolve the problem(s) through a direct meeting of the

special education directors and/or the superintendents of the involved LEAs. The LEAs may request that the SELPA Executive Director facilitate this resolution process. If an issue cannot be resolved between the involved LEAs then resolution will be requested from the SELPA Governing Council.

CONTRACTED SPECIAL EDUCATION SERVICES

GENERAL

When a LEA determines that it cannot meet the special education needs of a student(s), the LEA may enter into an agreement to contract for services with another LEA for a non-regionalized class within the SELPA. When a Regional Program Provider operates a classroom identified as a regional classroom or when a LEA operates a class that has been transferred from one regional provider to another, that LEA must offer a contracted service/class.

The following general provisions will govern Regional Program Providers when developing contracts for services:

1. The Provider must offer space for any qualified student in a regional class. Appropriateness is determined by the LEA offering regional services utilizing the same guidelines applied to district students.
2. An LEA that has transferred a class or service from a Regional Program Provider must allow all students who require such class or services to enroll. If necessary, the LEA must open new classes/classrooms if demand necessitates.
3. The Provider will provide services and invoice Consumers.
4. The costs of contracted services are determined by the per student average cost in the program operated by the Provider unless otherwise specified in a mutually agreed to Individual Service Agreement.
5. Agreements between Regional Program Providers and an LEA concerning services for a specific student are made based on the parameters established by IEP determined needs. A Provider/Consumer MOU Agreement and an Individual Service Agreement for each student are written after the IEP team establishes that the student will be placed in the program or receive the service(s).
6. On-going student Individual Service Agreements shall be completed by the Regional Program Provider and submitted to the Regional Program Consumer no later than October 31 of the current year, or 30 days after enrollment.

Billing for Contracted Services - Students

An IEP team may place a student outside that student's LEA of residence by agreement of the receiving Regional Program Provider. The contracting Provider shall charge the LEA of residence based on the Provider's fee for service block unless otherwise specified in a mutually agreed to Individual Service Agreement or MOU.

Billing for Contracted Services

LEAs that contract with Regional Program Providers to provide specific special education services will use the principles described in this document. All Regional Program Providers will follow the same timeline for yearly costs estimates.

Student Specific Additional Costs
Additional costs beyond the agreed to formula or contract, dictated by the student's IEP are paid by the District of Special Education Accountability based on specific student needs unless otherwise specified in a mutually agreed to Individual Service Agreement or MOU.

Transportation Costs
The District of Special Education Accountability will pay transportation costs. Transportation is based on the specific needs as defined by the IEP team for transportation of the individual student and not exceed that of students with similar transportation needs. The individual costs will be determined at the time an Individual Service Agreement is reached.

Student Discipline
If a student is expelled, or the LEA of attendance suspends the expulsion, responsibility for educational services resides with the District of Special Education Accountability. All costs associated with the educational placement of a student after an expulsion or suspended expulsion are the responsibility of the District of Special Education Accountability.

OPERATIONAL RESPONSIBILITIES OF SELPA MEMBERS

Charter Schools
Charter schools that become SELPA member LEAs have the same responsibilities and benefits as any SELPA member. Charter SELPA members are fully responsible for directly providing or contracting for all services. A member Charter School may use an LEA regional classroom by complying with the funding requirements in this document.

Custodial/Maintenance
The Regional Program Provider will reimburse an LEA for custodial and maintenance based on the current rate per square foot of instructional space. This amount will be adjusted by statutory COLA on a yearly basis. These expenses are factored into the LEA's costs and may subsequently be charged to a program. An LEA may decide to provide custodial/maintenance for any classroom they operate.

Housing a Regional Class
In the event the SLOCOE is requested to operate a program, member LEAs will provide a classroom, or space, on a district campus. The Regional Program Provider will reimburse an LEA for housing based on the current rate per square foot of instructional space provided for the class. This amount will be adjusted by the statutory COLA on a yearly basis. The expenses are factored into the regional costs for providing services.

Utilities
A Regional Program Provider will reimburse an LEA for utility usage based on the current rate per square foot of instructional space. This amount will be adjusted by statutory COLA on a yearly basis. These expenses are factored into the LEA's costs and may subsequently be charged to a program.

California Children's Services
Facility Agreements shall remain current between the facility host LEA and CCS with annual renewals. Per the Facility Agreement, facility requests will be discussed by SELPA Governing Council as brought forth by the hosting LEA of the Medical Therapy Unit for approval. All approved costs up to $15,000 will be covered through the SELPA High Cost Pool. Costs in excess of $15,000 will be discussed for reimbursement by CBOs with final approval by the Governing Council.

Types of requests include;

- Maintenance: Maintenance and/or repairs specific to the space that CCS is occupying. Excludes major building repairs that are related to building ownership.
- Renovations/Enhancement: upgrades based on CCS request.

Management Information System

All SELPA members are responsible for expenses related to collection and reporting of special education data related to their students. The SELPA shall provide annual contracts for such services to those LEAs requesting MIS services from the SELPA. An LEA is not restricted from contracting with a Regional Program Provider for MIS services for students not participating in regional programs.

REPORTING REQUIREMENTS

The SELPA and the member LEAs shall follow all Federal, State, and local reporting requirements. Reports must be submitted in their entirety and within the timeline to the SELPA for approval and in a format or on forms prescribed by the SELPA. The reports shall be maintained and made available by the member LEA for public review. The SELPA will conduct a detailed fiscal review of those documents for technical accuracy and reasonableness and will provide the final report to the appropriate agency. These reports include but are not limited to, the Maintenance of Effort and Excess Cost Reports. The SELPA is required to take action against those LEAs who do not meet Maintenance of Effort requirements as outlined in the Local Plan. See Appendix III for timelines.

SELPA FUNDING ALLOCATION PLAN REVIEW

The Governance Council's approval of the Funding Allocation Plan constitutes an agreement that the member LEAs will follow the provisions of the plan. The funding plan is edited annually and fully reviewed every three years by a subcommittee established by the SELPA Governing Council. This plan may be adjusted or revised at any time by a majority vote of the Governing Council. This plan is in effect until it is modified or revised by the SELPA's Governing Council.

APPENDIX I - Definitions

For the purpose of this agreement the following definitions will be used:

1. Block Fee Schedule: The method of determining costs for classrooms. It is based on a basic "Fee for Service" developed by each Regional Program Provider.
2. Contracted Programs: Services provided by a Regional Program Provider which serves students with IEPs from other LEAs.
3. Cost of Living Adjustment (COLA): Actual amount funded by the State.
4. Contracted Services/Classrooms: Those provided by a Regional Program Provider. Regional Program Providers are required to continue the operation of these classrooms by providing services to other LEAs within the SELPA if the class is considered a regional class under the funding model or if the LEA has transferred a classroom from the COE. LEAs may provide contracted programs and services other than those noted at their discretion which may not be considered regional programs and services.
5. Direct Allocation Any allocation set aside for specific expenses prior to distributing funds to the LEAs. This is used interchangeably with "off the top."
6. Educational Placing Agency: Any agency including a LEA from outside of the SELPA that is financially responsible for the educational placement of a student within the SELPA.
7. Educationally Related Social Emotional Supports and Services (ERSESS): San Luis Obispo SELPA's local term for Educationally Related Mental Health Services (ERMHS). These are the mental health services necessary for a student with a disability to benefit from a special education program.
8. Large School LEA: A LEA with an enrollment of more than 1,000 ADA. Atascadero USD, Lucia Mar USD, Paso Robles JUSD, San Luis Coastal USD, and Templeton USD are considered the large LEAs.
9. Local Administration Regulation (LAR): Refers to the rules for operation laid out in the Local Plan.
10. Off the Top: Any allocation set aside for specific expenses prior to distributing funds to the LEAs. This is used interchangeably with "direct allocation."
11. Regional Program Consumer: An LEA seeking regional programs and services provided by a Regional Program Provider.
12. Regional Program Provider: An LEA that provides programs and services on a regional basis and is available for appropriate students within the region of the SELPA.
13. Related Services: Supportive services required to assist a student with disabilities to benefit from special education. Examples: Speech, Occupational Therapy, and Health and Nursing Services.
14. SELPA or SELPA-wide: All of member LEAs operating under the policies of the Local Plan.
15. SELPA Office or SELPA Administration: The SELPA Executive Director and staff.
16. Small School LEA: A LEA with an enrollment of less than 1,000 ADA. Almond Acres Charter Academy, Bellevue-Santa Fe Charter School, Cayucos, Coast, Pleasant Valley, San Luis Obispo County Office of Education, San Miguel, and Shandon are considered the small LEAs.
17. State Formula: The manner in which state funds were allocated to the SELPA. For example: by ADA, CBEDS, Bed Count, etc.
18. Systematic Transfer: A program transfer done by withdrawing students from a regional program with the intent of starting a similar or identical program which may or may not be regionalized. The LEA withdrawing students has not given a Year and A Day Notice as defined below which

results in a fiscal impact to other Regional Program Consumers. The Governing Council shall review any allegation of Systematic Transfer and make the final determination as to a resolution or action required.

19. SELPA Approval Process: The systematic planned review and recommendations of SEOC and CBOs (as appropriate) and the subsequent decision and action of the Governing Council.
20. Year and A Day Notice: Refers to 366 days regardless of time of year program transfer notice is given. Year and A Day Notice refers to a June 30th statutory notification unless otherwise agreed by the Regional Program Provider and Regional Program Consumer.

APPENDIX II - Regional Programs & Contracted Related Services

Available Regional Programs

	AUSD	COE	LMUSD	PRJUSD	SLCUSD
More Intensive – Preschool	2		3	2	1
More Intensive – Elementary	K-2 (1) 2-5 (1)		K-7 (1)	K-2 (1) 3-5 (1)	K-2 (1) 2-6 (1)
More Intensive – Middle School			5-8 (1)	1	7-8 (1)
More Intensive – High School	1		2	1	1
More Intensive – Post Secondary	1		3	1	1
Therapeutic Learning Class – Elementary	1		1		1
Therapeutic Learning Class – Middle				1	1
Therapeutic Learning Class – High School	1		1	1	1
Medically Fragile – Pre K – Adult			1	1	1
Deaf or Hard of Hearing – Preschool/Elementary		1			
Deaf or Hard of Hearing – Middle		1			
Intensive TLC – 2-8		1			
Intensive TLC – 7-12		1			
County Jail		X			
Home/Hospital		X			
Contracted Related Services	X	X	X	X	X

Related Services may include, but are not limited to the following:

Code	Related Service	Code	Related Service
415	Language and Speech	545	Residential Treatment Center
425	Adapted Physical Education	610	Specialized Services for Low Incidence
435	Health and Nursing – Specialized Physical Health Care	710	Specialized Services for Deaf and Hard of Hearing
436	Health and Nursing –Other Services	715	Interpreter Services
445	Assistive Technology Services	720	Audiological Services
450	Occupational Therapy	725	Specialized Vision Services
460	Physical Therapy	730	Orientation and Mobility
510	Individual Counseling	735	Braille Transcription
515	Counseling and Guidance	740	Specialized Orthopedic Services
520	Parent Counseling	755	Transcription Services
525	Social Work Services	760	Recreation Services (therapeutic recreation)
530	Psychological Services	800	Transition Services
535	Behavior Intervention Services	900	Service Plans

APPENDIX III - SELPA LEA Due Dates

Month	Description	Due To	Due Date	Note
JUL	Final Invoice for Contracted Services (prior school year)	Regional Program Consumer	Provider to Consumer: no later than **July 15** for prior fiscal year	
AUG	NPS Pool Claims–Basic Education	SELPA	No later than **August 1** but may be submitted anytime during the year	No reimbursements approved for prior year invoices received after August 1st unless otherwise approved by Governing Council
SEPT	Prior Year Excess Cost Reports	SELPA	**September 15**	
	SEMA/SEMB (Maintenance of Effort)	SELPA	**September 15**	
OCT	Revised Fee for Service Schedule (Block Fees)	Regional Program Consumer & SELPA	On or before **October 31**	
	Student Contracts, ISA, and Related Service Contract Agreement	Regional Program Consumer	On or before **October 31**	MOU for new students is due within **30 days of IEP meeting**
JAN	Midyear Invoice for Contracted Services (current school year)	Regional Program Consumer	On or before **January 31**	Midyear invoice for the current fiscal year shall be reported no later than January 31 and will be based on the January 31 Final Fee Schedule
	Final Fee for Service Schedule (Block Fees)	Regional Program Consumer and SELPA	Provider to Consumer: Final Fee for Service costs no later than **January 31**	When a fee for service schedule Is not submitted by October 31, the last schedule will apply and be subject to the 7% fee adjustment over prior FY
FEB	Need for Specific Related Services	Regional Program Provider	Prior to **February 1** of the year of the effective date	Consumer gives written notice
APRIL	High Cost Pool Claims	SELPA	No later than **April 15**	Reviewed by the Governing Council for consideration and approval
	Preliminary budget development; Fee for Service Schedule (Block Fees) (upcoming fiscal year)	Regional Program Consumer & SELPA	Provider to Consumer & SELPA: projected costs no later than **April 30**	Will not increase more than 7% over the prior fiscal year; October to October.
JUNE	Discontinuing Specific Related Services	Regional Program Provider & SELPA	A year and a day prior to discontinuing services	Consumer gives written notice
	Low Incidence Reimbursement Invoices	SELPA	**June 1**	Provide invoices for LI Equipment Pool reimbursements through May 31. For LI form requests received & approved at SELPA throughout the FY.
	Final ISA invoices due	Regional Program Consumer	**June 15th**	Based on October Block Fees and the number of days attended.