

SONOMA COUNTY OFFICE OF EDUCATION

UNIFICATION FEASIBILITY STUDY

DRAFT

**REORGANIZATION OF SANTA ROSA CITY HIGH SCHOOL DISTRICT AND
THE NINE FEEDER ELEMENTARY SCHOOL DISTRICTS**

JANUARY 2024

Table of Contents

Letter to The Governing Board and Superintendent Trunnell, Santa Rosa City Schools	1
School District Reorganization Background	2
Methodology.....	5
Executive Summary.....	6
Criterion #1: Number of Pupils	9
Criterion #2: Community Identity.....	11
Criterion #3: Division of Property	19
Criterion #4: Discrimination or Segregation.....	20
Criterion #5: Cost to State.....	33
Criterion #6: Education Programs	34
A Recap of Studies Reviewed.....	43
Criterion #7: School Housing Costs	45
Criterion #8: Property Values.....	52
Criterion #9: Fiscal Management of Fiscal Status.....	53

January 8, 2024

To: The Governing Board and Superintendent Trunnell, Santa Rosa City Schools

cc: Dr. Amie Carter, Sonoma County Superintendent of Schools

Christy White, Inc. (CW) was engaged by the Sonoma County Office of Education (SCOE) to evaluate unification feasibility for the creation of a hypothetical unification of the Santa Rosa City High School District (SRCHSD) with all the nine elementary feeder school districts.

The Sonoma County Office of Education (SCOE) stated that the study's purpose was to help answer this question:

Would unification enhance the instructional opportunity for all students at a similar or reduced cost to the affected districts and/or taxpayers?

This study is the second part of a two-part study.

1. The first part, *Financial Feasibility Study for the Reorganization of Santa Rosa City High School District and the Nine Feeder Elementary School Districts*, was released in October 2022 and is available from SCOE or Santa Rosa City Schools (SRCS).
 - a. The report focused on the second part of the above statement, whether costs could be the same or reduced after unification.
 - b. The report concluded that the Scenarios studied could provide cost savings to offset funding loss from recalculation of the Local Control Funding Formula (LCFF) and perhaps achieve a fiscal net gain. In other words, it would be financially feasible due to economies of scale but only with careful advanced planning to avoid fiscal cliffs from losing LCCF funds.
 - c. A public meeting was held by SCOE on October 3, 2022, to review the report's conclusions.
 - d. A second meeting was held on January 18, 2023, by the Santa Rosa City School (SRCS) Board to proceed with the second part and study Scenario 1, full unification of SRCS.
2. The second part, this report, conducts a full study of all required state criteria for unification (EC Section 35753). The purpose is to assess whether a Santa Rosa City Unified School District could be approved to proceed in a process that might ultimately result in an election.
 - a. This study is exploratory only, and no petition to unify has been initiated, nor planned.
 - b. This second also provides information relevant to determine whether unification will enhance the instructional opportunity for all students (as stated in the first part of the purpose).

SCHOOL DISTRICT REORGANIZATION BACKGROUND

In the State of California, the goals for school district reorganization (e.g., unification) include promoting a high-quality education, fiscal responsibility, equitable access to educational resources and programs, and aligning boundaries with changing community needs.

The Sonoma County Committee on School District Organization (SCCSDO) is responsible for school district reorganization in the Santa Rosa area and countywide. Duties include administering state laws and regulations, studying validated petitions, setting elections, and approving trustee areas. The SCCSDO may proactively initiate studies but reorganization actions that could lead to an election are left in the hands of the citizens. The SCCSDO has approved this study but there is no action before the committee for consideration.

School district consolidation in Sonoma County has long been discussed as student enrollment declines county-wide and state funding struggles to keep up with educational needs. The Sonoma County Grand Jury examined school district consolidation, which is recapped by Staff Writer Laura McCutcheon, Sonoma West Times:

Sonoma County Grand Jury Report on School District Consolidation, June 1, 2011: “The Grand Jury believes better education, not cost savings, is the most compelling benefit that school district consolidation/unification may achieve. Improved education can take place through articulation and the implementation of some standardized teaching methods, which will provide a better focus to get students the best education possible,” the report states, citing the success of Twin Rivers School District in Sacramento — a consolidation of districts that since becoming one about three years ago has seen better test scores.”

In addition, the report noted that the decline in enrollment and funding made the “current school district configuration not financially sustainable, and there could be dollars saved by school district consolidation/unification.”

Consolidation of schools through unification, unionization (merging elementary or high school levels), or common administration that SRCS uses today can eliminate duplicative services, provide economies of scale, and streamline administration. The cost savings that result provide the governing board with more resources for educational priorities. Instructional and pupil support services and operations could be enhanced if there are net positive fiscal gains after reorganization.

SCHOOL DISTRICT REORGANIZATION BACKGROUND, CONT'D

The Santa Rosa area districts included in this study are:

School Districts	Total Enrollment
Bellevue Elementary School District	1,586
Bennett Valley Elementary School District	951
Kenwood Elementary School District	113
Mark West Elementary School District	1,305
Piner-Olivet Elementary School District	1,235
Rincon Valley Elementary School District	3,072
Roseland Elementary School District	2,766
Santa Rosa City Elementary Schools	4,861
Santa Rosa High School District	10,179
Wright Elementary School District	1,279
Total Santa Rosa Area School Districts	27,347
<i>Source: CDE 2022-23 Data</i>	

Santa Rosa City Elementary and High School Districts are legally separate but consolidated for administrative functions with one governing board, one Superintendent, common administration, shared union contracts, and central facilities. The remaining eight feeder elementary school districts are separate entities and are served for secondary education purposes by Santa Rosa City High School District (SRCHSD). Ten school districts serve the heart of Santa Rosa, Sonoma County, and the surrounding foothill areas of Mark West and Kenwood. The schools serve about 27,000 pupils K-12, with one high school district and nine feeder elementary school districts. The first schools in the area started in the mid-1800s. Santa Rosa High was established in 1874.

SCHOOL DISTRICT REORGANIZATION BACKGROUND, CONT'D

The largest elementary school district, Santa Rosa City Elementary School District (SRCESD), consolidates administratively with Santa Rosa City High School District (SRCHSD). This means that the governing board and district office staff are shared by the two districts.

Except for SRCESD, all feeder elementary districts have separate boards and administration. Consolidation has the potential to save significant costs through the elimination of duplicative positions and possibly consolidation of school facilities. As this study shows, there are also educational advantages to a single unified school district model.

Other key characteristics of the districts include:

- SRCHSD operates five comprehensive high schools, four middle schools, and one alternative high school.
- The elementary districts are a combination of grades K-6 and K-8 school sites. Middle school pupils are served either by the elementary school district or SRCHSD.
- There are nineteen locally governed charter schools sponsored by six of the districts. Local charters have allowed three districts to receive extra basic aid supplemental funding. The charters can, in some cases, serve grades K-12.
- The districts are in the Local Education Agency (LEA) for the Santa Rosa County Special Education and Student Services Consortium.
- The pupils in the Santa Rosa area are demographically predominately Hispanic (57%), followed by White (29%), with smaller sub-groups including Asian, American Indian, and African American. Roseland and Bellevue are nearly all Hispanic, while Kenwood and Mark West are predominately White (about 68%).
- In the greater Santa Rosa area, 56% of pupils are eligible for free and reduced meals and/or are English Language Learners. But there is a wide range of eligibility (between 24% and 93%) when comparing individual elementary districts.

METHODOLOGY

About the Consultant: Christy White, Inc. (CW) is a licensed Certified Public Accounting firm specializing in school district auditing and consulting. President Christy White, CPA, CFE, was the lead consultant on this study and the financial feasibility study. She has 38 years of experience working with educational agencies throughout California and a specialty in school district organization. Ms. White has worked on dozens of reorganization feasibility studies throughout California, including Sonoma County. CW was engaged by the Sonoma County Office of Education (SCOE) after a formal selection process in 2021.

District Interviews: CW solicited input from Santa Rosa City Schools (SRCS) and the eight independent feeder elementary school districts. CW reached out several times to each district with an offer to meet and discuss the study and the district's educational programs. Only SRCS fully participated.

SRCS arranged interviews with staff from key departments, the Superintendent, cabinet members, and representative board members. In addition, CW was invited to attend a board meeting at Bennett Valley Elementary School District to answer questions about the study and hear from staff representatives in the audience. CW was invited to speak with the Superintendent of Rincon Valley Union Elementary School District about the study scope. No other districts agreed to participate in the study.

Despite the lack of broad participation in the study, CW obtained sufficient independent data to form conclusions on each State's criteria through statewide published data, website information, and SCOE.

Use of District Data: CW utilized state reports provided by the districts to the Sonoma County Office of Education (SCOE) and the California Department of Education (CDE). The data is from mandated state reporting that includes:

- ✓ California Dashboard – statewide academic performance
- ✓ California Assessment of Student Performance (CAASPP) – student assessment results
- ✓ SACS financial reporting – interim, budget, and unaudited actual reports
- ✓ CBEDS – enrollment census counts
- ✓ CalPADS – unduplicated pupil counts by subgroup
- ✓ Apportionment schedules – the amount paid by the state and federal government
- ✓ ADA reporting – average daily attendance
- ✓ Charter School Directory – listed by the school district
- ✓ Property Tax Reporting – actual property taxes collected by each District

The CDE and Ed Data Partnership aggregate this data and have search engines CW used for downloading data for each school district in the study.

In addition, CW found data from these sources:

- ✓ Sonoma County Assessor's Office – data on assessed valuation
- ✓ District websites

EXECUTIVE SUMMARY

The study question SCOE posed was, “would unification enhance the instructional opportunity for all students at a similar or reduced cost to the affected districts and/or taxpayers?” The answer is yes, however, a financial plan would need to be put in place to ensure the new district is fiscally sound upon the unification effective date. Reduced costs are feasible but will take time to fully implement. This study examines the State’s nine required criteria for the unification of the Santa Rosa area schools.

There is presently no petition to unify the Santa Rosa City Schools and feeder elementary school districts. This is a study only to see if full unification could meet state criteria and to evaluate the possible impacts. Should a valid petition be put forth to unify two or more of the school districts in the Santa Rosa Area, the proposal would need to substantially meet the criteria in Education Code Section 35753, meet other state laws, be approved by the county committee for election and be approved by a majority of the voters in each affected school district. Even if initiated, the process could take 2-3 years or more.

The State’s criteria in EC Section 35753 have separately been analyzed in this study. The California Department of Education (CDE)’s School District Organization (SDO) Handbook outlines the laws and regulations for SDO and provides practical considerations. The criteria are:

1. The reorganized districts will be adequate in terms of number of pupils enrolled.
2. The districts are each organized on the basis of a substantial community identity.
3. The proposal will result in an equitable division of property and facilities of the original district or districts.
4. The reorganization of the districts will preserve each affected district's ability to educate students in an integrated environment and will not promote racial or ethnic discrimination or segregation.
5. Any increase in costs to the state as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.
6. The proposed reorganization will continue to promote sound education performance and will not significantly disrupt the educational programs in the districts affected by the proposed reorganization.
7. Any increase in school facilities costs as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.
8. The proposed reorganization is primarily designed for purposes other than to significantly increase property values.
9. The proposed reorganization will continue to promote sound fiscal management and not cause a substantial negative effect on the fiscal status of the proposed district or any existing district affected by the proposed reorganization.

This report analyzes each criterion and CW provides a conclusion on each. The Sonoma County Committee on School District Organization has the discretion to accept and or not this report’s conclusions. And conditions might change that will affect the conclusions.

EXECUTIVE SUMMARY, CONT'D

Overall Study Conclusion: Christy White, Inc. (CW) analyzed the State's criteria for reorganization (ref. Education Code Section 35753) and concludes that:

- A unification of all nine feeder elementary school districts with SRCHSD **would substantially meet all the State's nine criteria if a realistic financial plan can be developed** to help ensure that the proposed reorganization will not cause a substantial negative effect on the fiscal status of the proposed district.

The Financial Plan: The financial plan would need to find an estimated \$21M in annual cost savings to offset the estimated loss in LCFF funding due to lost eligibility for community aid (basic aid) and concentration grant funds. The actual revenue loss would need to be recomputed closer to any unification date. Could making up for the revenue shortfall be accomplished? It appears feasible but only with careful planning.

The first study on financial feasibility compared a hypothetical Santa Rosa Unified to similar size unified districts. The analysis showed potential cost savings of \$45M annually that might be realized over time, providing a net positive fiscal gain of \$24M. If properly managed, the unified district could end up in a better position financially than today as separate districts. However:

- There are major timing challenges to reducing sufficient cost in the first year of unification, such as the two-year right to a continuing job at the same pay for classified staff.
- Over half of the \$21M (\$12M) needed to cover the LCFF loss might feasibly come from administrative consolidation, with the balance from program or school facilities consolidations.
- Adequate fund balance reserves could help bridge the funding gap in the early years.
- Another option to bridge the funding gap would be an attempt at special legislation to receive permanent or temporary apportionment add-on funds to compensate for the loss until the new district's budget can be stabilized. Since the State would be "saving" \$21M annually by Santa Rosa unifying, there would be justification for funding relief.

Opt-Out Option for Elementary School Districts: One or more elementary school districts may opt-out of a unification action and remain independent under the Thompson provisions of law (EC Sections 35542(b) and 35710). This exclusion from a reorganization action can be approved by the local elementary school district board.

If the unification election is successful, the opt-out district would continue to operate as before and send secondary students to the unified district instead of a high school district. The unified district would have no governance over the opt-out district, just like today.

All the state criteria would likely be met if one or more districts opted out, but the financial and educational advantages of consolidation might be less.

EXECUTIVE SUMMARY, CONT'D

Process and Timelines for Unification: The California School District Reorganization Handbook (<https://www.cde.ca.gov/re/lr/do/sdohandbook.asp>) sets forth the laws and regulations for initiating a petition to unify, public hearings, roles of the county committee and state board, and areas of election. There are strict timelines for each step in the process once a petition has been validated. It could take a minimum of two years from petition validation until the first year of the new unified district's operations.

Unification and territory transfers (including unionization) can be accomplished through processes laid out in law. Education Code Section 35700 allows for several types of petitions that would apply to SRCHSD and the elementary districts:

1. A petition signed by a majority of the members of the governing boards of all affected districts; or,
2. A government entity petitions to unify (e.g., city council, board of supervisors, or any special district); or,
3. A petition signed by at least 25 percent of the registered voters in the inhabited territory proposed to be reorganized (if the territory proposed for reorganization is located within two or more school districts, the signatures of at least 25 percent of the registered voters from that territory in each school district are required); or,
4. The County committee formulates a plan and recommendation under EC Section 35720, which is then submitted for approval by the State Board of Education.

Following the submission of a petition, the county superintendent would:

- a) Determine the sufficiency within 30 days of receipt (EC Section 35704),
- b) Hold public hearings within 60 days of receipt of a valid petition (EC Section 35705 and 35705.5), and,
- c) Conduct a study on the impact and make a county committee recommendation within 120 days of the first public hearing (EC Section 35753).

Note on Name Used for Possible New District: For simplicity, the consultant used the name Santa Rosa Unified to refer to a new consolidated school district. Should a petition to reorganize be put forth, the name of the new district(s) would be determined by the new governing school board(s).

CRITERION #1: NUMBER OF PUPILS

Statutory Requirement: The reorganized district will be adequate in terms of the number of pupils enrolled.

Regulations: This condition is governed by CCR, Title 5, Section 18573(a), which states that each affected school district shall have the following projected enrollment on the date that the proposal becomes effective:

Elementary District 901

High School District 301

Unified District 1,501

Analysis: A unified Santa Rosa district would have an estimated 27,000 pupils. As shown in the historical enrollment trend by the district on the next page, all elementary school districts have been steadily declining in population while the high school district is increasing. Explanations might include an aging population, fewer births in the county, high housing costs, and a decline in net migration into the area. The recent census showed a .4% decline in the past 10 years.

The reorganized district would be of significant size and meet the criteria and exceed 1,501 pupils.

Conclusion: The proposed unified district would be adequate in terms of the number of pupils enrolled.

CRITERION #1: NUMBER OF PUPILS, CONT'D

Trends in Enrollment and ADA (includes locally funded charters)								
<i>Source: CDE, LCFF ADA Exhibits</i>	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	% Change in Trend
Bellevue Elementary								
Enrollment Total	1,895	1,845	1,621	1,599	1,544	1,485	1,586	-16%
Total ADA			1,533	1,521	1,521	1,305	1,392	-9%
Reported ADA as a % of Enrollment			95%	95%	99%	88%	88%	
Bennett Valley Elementary								
Enrollment Total	1,035	1,022	995	1,003	989	956	951	-8%
Total ADA			964	970	970	897	864	-10%
Reported ADA as a % of Enrollment			97%	97%	98%	94%	91%	
Kenwood Elementary								
Enrollment Total	149	141	138	141	131	116	113	-24%
Total ADA			130	136	136	105	57	-56%
Reported ADA as a % of Enrollment			94%	96%	104%	91%	50%	
Mark West Elementary								
Enrollment Total	1,475	1,459	1,444	1,414	1,298	1,280	1,305	-12%
Total ADA			1,390	1,373	1,245	1,078	1,235	-11%
Reported ADA as a % of Enrollment			96%	97%	96%	84%	95%	
Piner-Olivet Elementary								
Enrollment Total	1,422	1,358	1,261	1,281	1,240	1,225	1,235	-13%
Total ADA			1,241	1,235	1,229	1,191	1,132	-9%
Reported ADA as a % of Enrollment			98%	96%	99%	97%	92%	
Rincon Valley Elementary								
Enrollment Total	3,552	3,442	3,307	3,241	3,096	3,020	3,072	-14%
Total ADA		3,070	3,203	3,144	3,152	3,005	2,913	-9%
Reported ADA as a % of Enrollment		89%	97%	97%	102%	100%	95%	
Roseland Elementary								
Enrollment Total	1,527	1,422	1,412	1,408	1,435	1,469	1,473	-4%
Total ADA			1,355	1,362	1,362	1,334	1,378	2%
Reported ADA as a % of Enrollment			96%	97%	95%	91%	94%	
Santa Rosa Elementary								
Enrollment Total	5,315	5,246	4,992	5,016	4,651	4,941	4,861	-9%
Total ADA				4,709	4,686	5,025	4,411	-6%
Reported ADA as a % of Enrollment				94%	101%	102%	91%	
Santa Rosa High								
Enrollment Total	10,179	10,394	10,821	10,941	11,104	11,186	11,263	11%
Total ADA				10,444	10,252	10,207	9,867	
Reported ADA as a % of Enrollment				95%	92%	91%	88%	
Wright Elementary								
Enrollment Total	1,593	1,567	1,480	1,451	1,308	1,276	1,279	-20%
Total ADA			1,408	1,383	1,383	1,136	1,127	-20%
Reported ADA as a % of Enrollment			95%	95%	106%	89%	88%	
					Total Enrollment 2023		27,138	
					Total ADA 2022-23		24,376	
				Reported ADA as a % of Enrollment			90%	

CRITERION #2: COMMUNITY IDENTITY

Statutory Requirement: The district is organized on the basis of a substantial community identity.

Regulations: This condition is addressed by CCR, Title 5, Section 18573(a)(2), which should be reviewed together with the following guidelines.

No single factor is likely to determine that community identity exists. The county committee probably will need to examine several attributes of the population and the makeup of the territory in question to make a judgment on this condition. Some indicators that the committee might study include types of housing, parks and recreation facilities and programs, sports activities, transportation patterns, geopolitical factors, and shopping patterns.

- a. Similarity of architecture, size, and style of homes can create a sense of community identity.
- b. The usage patterns of parks and school facilities for recreation programs and sports activities for youth can be indicators of a school district's community identity.
- c. Traffic patterns and public transportation systems and routes may have an impact on community identity.
- d. Geopolitical factors such as topography and city council, county supervisor, and special district electoral districts might also create community identity in a school district. Post office names and zip code areas also could contribute.
- e. Neighborhood and regional shopping patterns are often well defined and play a part in the community identity of a school district.
- f. There is no legal necessity that school district boundaries match city boundaries.

Analysis: The studied unification area is the established high school district boundaries, and on this basis alone, community identity could be attributed. There are unique neighborhoods and community centers throughout the area, but overall, the region is known as Santa Rosa, with a possible exception for Kenwood, which lies outside the city and is known for its viticulture economy. Some of the key characteristics that define the study area are provided in the following pages:

Demographics: According to the US Census, 2022, there is an estimated population of 177,181, of which 15% are school-age, 54% White, 24% Hispanic, 11% Two or More Races, 6% Asian, 2% Black, and 1% American Indian. (Note: the school age demographics are much different and analyzed under Criterion #3.) The average home price is \$661,700, and the median household income is \$92,604.

Tourism with the wine regions and redwood forests provides economic resources. Major employers include county government, the health care systems serving the area, the school districts, Keysight Technologies, Amy's Kitchen, automotive businesses, aviation, and retailers.

Wine appellations: Several wine appellations overlay or border the unification area including Russian River Valley, Fountaingrove, Sonoma Valley, Bennett Valley, and Kenwood. The wine industry is a major draw for tourism.

CRITERION #2: COMMUNITY IDENTITY, CONT'D

Analysis, Cont'd

Architecture: Source: City of Santa Rosa’s website,

Historically “Santa Rosa, the City Designed for Living, has long been known for its fine buildings and historic neighborhoods. Preservation of these resources is evidenced by the on-going efforts of longtime residents and newcomers alike. Santa Rosa’s architectural heritage includes the Carrillo Adobe from the Mexican Period; Gothic and Greek Revival Style houses from the late 1800s; imposing residences in the Greek Revival, Queen Anne, Italianate, and Stick/Eastlake Styles at the turn of the century; stone buildings constructed by Italian stone masons in Railroad Square; Craftsman and California Bungalow Styles after 1910; and Spanish and Mission Revival styles in the 1920s and 1930s. Today there are more contemporary designed including green buildings with solar and other energy efficient innovations.”

Climate: Santa Rosa has a warm-summer Mediterranean climate with cool, wet winters and warm, dry summers. In the summer, fog and low overcast often move in from the Pacific Ocean during the evenings and mornings. Fog usually clears up to warm, sunny weather by late morning or noon before returning in the later evening but will occasionally linger all day. Average annual rainfall is 32.20 inches (818 mm), falling on 74 days annually.

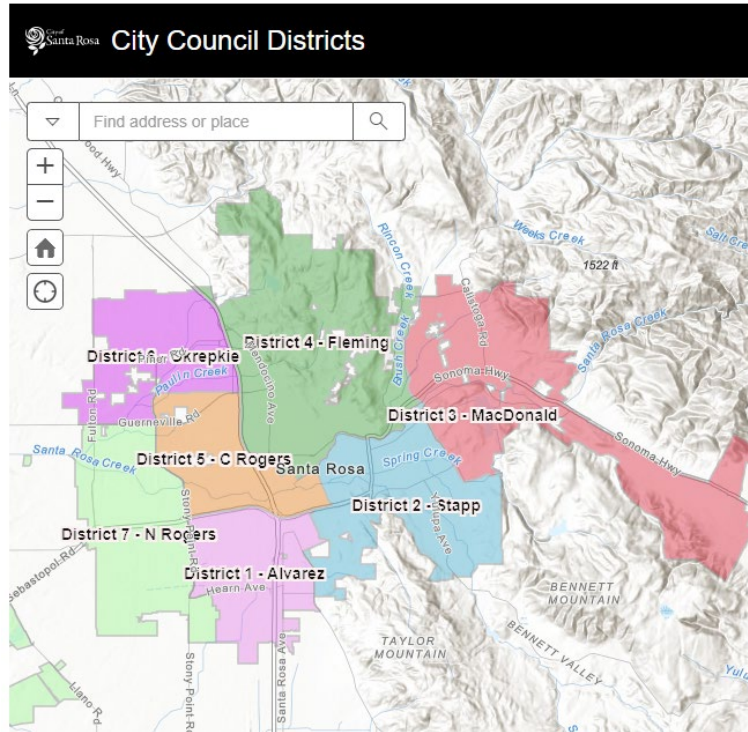
Neighborhoods (Source: Wikipedia): Santa Rosa area-wide (not including Kenwood), neighborhoods, including both current ones and areas formerly known and named, include:

Apple Tree I and II	Bennett Valley
Burbank Gardens Historic District	Cherry Street Historic District
Coffey Park	Dutton Avenue
Fountain Grove	Hidden Valley
Holland Heights	Indian Village
Juilliard Park	Junior College ^[26]
Lomita Heights	McDonald Mansion Historic District
Monroe District , an area historically known, from 1870s on	Montecito Heights
Montgomery Village	Moorland Avenue
North Junior College ^[27]	North West Santa Rosa
Oakmont Village ^[28]	Olive Park
Railroad Square District	Ridgway Historic District
Rincon Valley	Roseland
Santa Rosa Avenue	Skyhawk
Spring Lake	Annadel Heights
South Park	St. Rose Historic District ^[29]
Stonegate	Town & Country/Grace Tract
West 3rd	West End Arts and Theater District
West End Historic District ^[30]	West Junior College
Valley Oak	

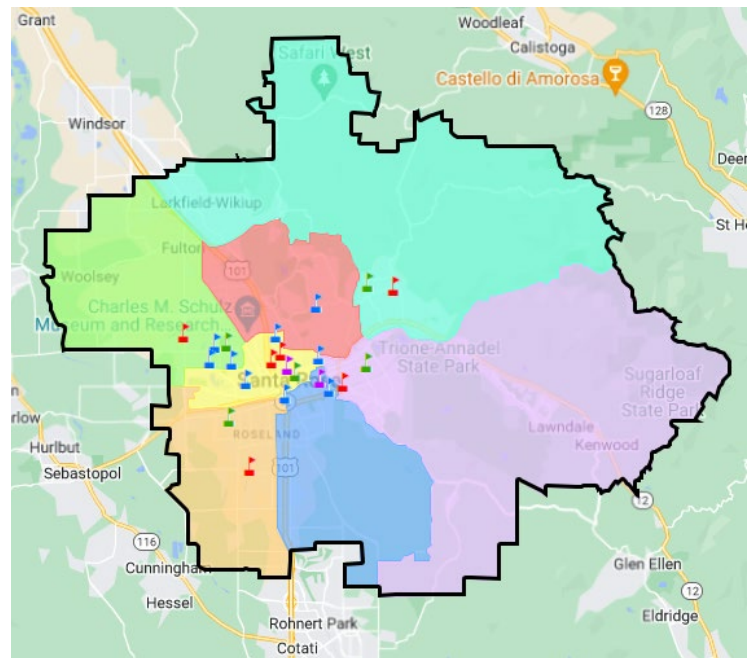
CRITERION #2: COMMUNITY IDENTITY, CONT'D

Analysis, Cont'd

Sphere of Influence: All affected school districts, except for Kenwood, primarily reside within the City of Santa Rosa sphere of influence. The sphere of influence aligns to a significant degree with the City's boundaries. There are seven board of trustee areas within the SRCS and seven City Council areas. The city council district and school trustee boundaries are not the same but there is some overlap. The school district also includes unincorporated areas.



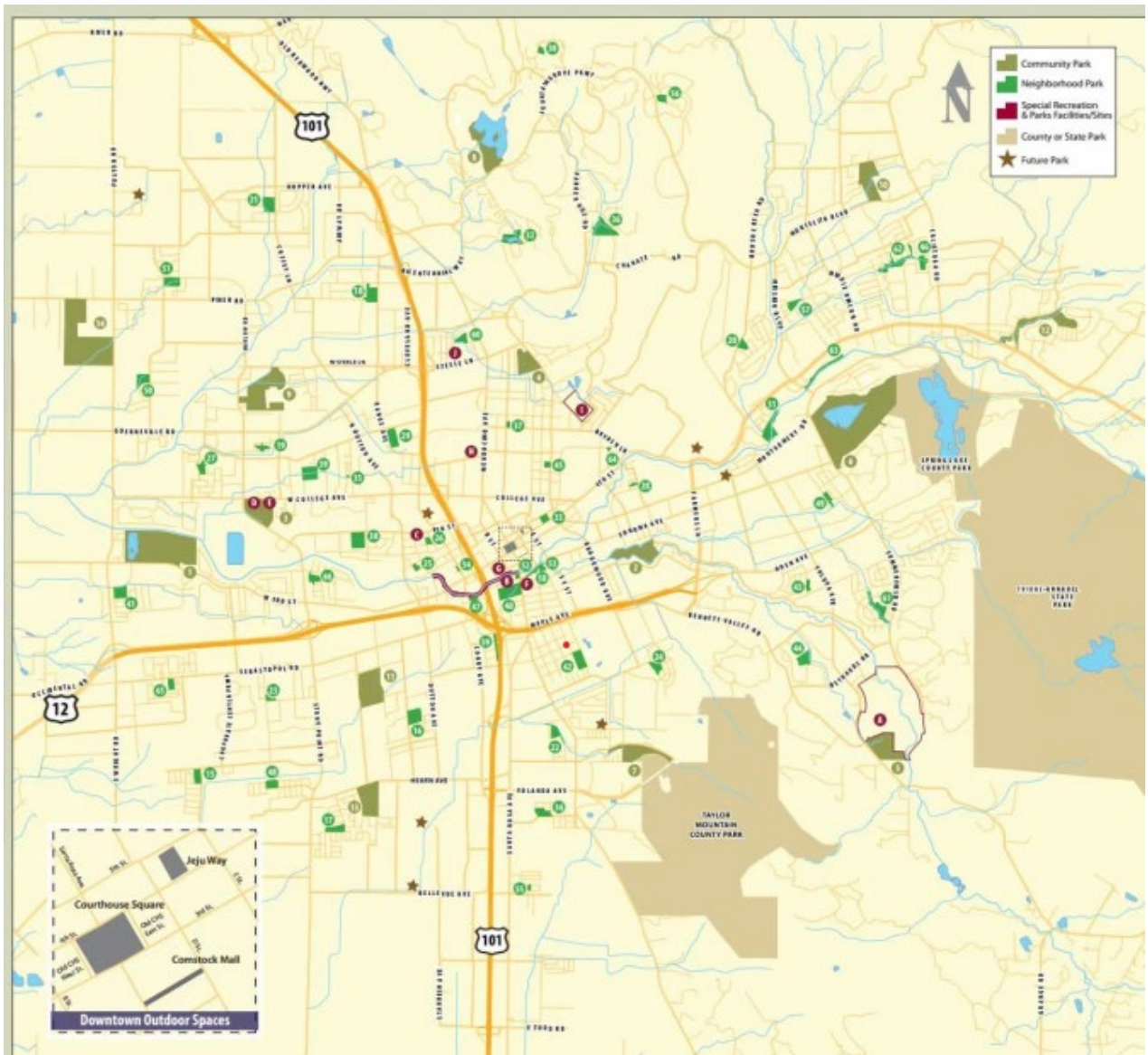
The SRCS trustee areas are shown below:



CRITERION #2: COMMUNITY IDENTITY, CONT'D

Analysis, Cont'd

Parks: A City of Santa Rosa map of local parks is shown below. The map (source: City of Santa Rosa) is not all-inclusive of all parks but does show that the City of Santa Rosa operates all the parks in the study area from Nagasawa in the north, Rincon Valley in the East, Southwest Community and Youth Community. Note: Taylor Mountain Regional Park is run by the county. These parks are located within the respective areas of each elementary school district and the high school district as a whole.



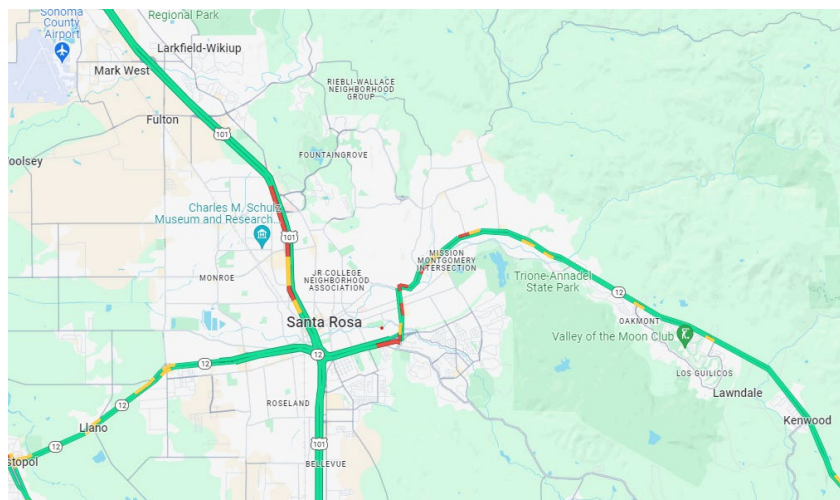
CRITERION #2: COMMUNITY IDENTITY, CONT'D

Analysis, Cont'd

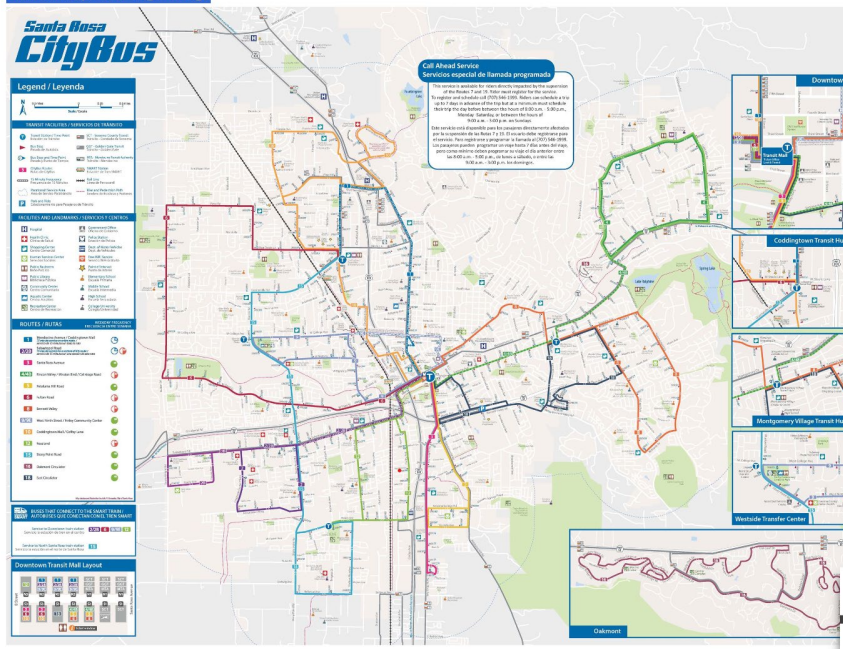
Traffic Patterns: Traffic patterns and public transportation systems and routes may have an impact on community identity but there appear to be available public transit and traffic routes (albeit with high volume during peak hours).

Hwy 101 is the north-south route and Hwy 12 east-west, creating four quadrants: Northeast, Southeast, Southwest, and Northwest. U.S. Route 101 runs roughly north-south through the city and divides it into east and west sides. State Route 12 runs roughly east-west and divides the city into north and south sides.

There is community identity reported based on where one lives in relationship to these major traffic routes or quadrants, but there are no barriers to transportation and these routes help provide access to the entire high school district territory. A city operated bus system reaches all but the Kenwood area. Kenwood is serviced by a county transit bus system.



Click on map for a larger image



CRITERION #2: COMMUNITY IDENTITY, CONT'D

Analysis, Cont'd

Geopolitical factors: Geopolitical factors such as topography and city council, county supervisor, and special district electoral districts further create community identity in a school district. Post office names and zip code areas also contribute.

Except Kenwood, which is in a county unincorporated area, all the school districts are mainly in the City of Santa Rosa (with some unincorporated areas). Kenwood has a Fire Protection District. Santa Rosa is the hub for many county special districts with addresses in Santa Rosa including the Transportation Authority, County Public Safety Consortium, Public Law Library, Sonoma Mountain Water District, Sonoma Resource Conservation District, County Sanitation and more.

Higher education based in Santa Rosa includes Santa Rosa Junior College and Empire College.

The SRCS trustee areas are divided into seven areas. If unified, the trustee areas would help represent the views and needs of the different neighborhoods and could be adjusted periodically with demographic shifts.

There are nine zip codes used in the area:

Santa Rosa, CA has 9 ZIP Codes

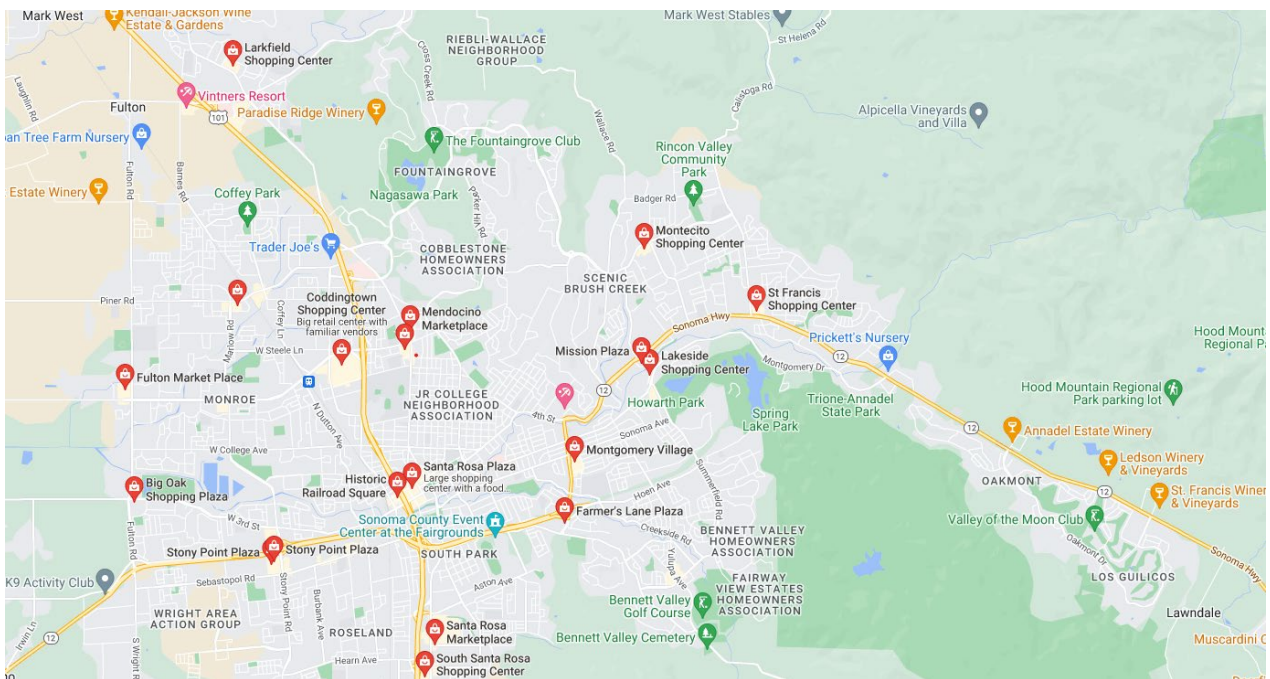
ZIP Code	Type	Population	% of Population	Alias Names
92274	Standard	19,251	8.31%	100 Palms, Desert Shores, One Hundred Palms, Sandy Korner, Torres Martinez Indian Reser, Valerie, Vista Santa Rosa
95401	Standard	37,272	16.10%	
95402	P.O. Box	0	0.00%	
95403	Standard	44,705	19.31%	Larkfield
95404	Standard	38,034	16.43%	
95405	Standard	22,015	9.51%	
95406	P.O. Box	0	0.00%	
95407	Standard	42,504	18.36%	Roseland
95409	Standard	27,741	11.98%	Kenwood

CRITERION #2: COMMUNITY IDENTITY, CONT'D

Analysis, Cont'd

Shopping: Neighborhood and regional shopping patterns are often well defined and play a part in the community identity of a school district. Shopping centers serve neighborhoods and the larger ones, like Santa Rosa Plaza the entire area. Add to this, Coddington to the north and Montgomery Village to the east, Stony Point and Big Oak Plazas to the west, Santa Rosa Marketplace and South Santa Rosa to the south.

A map of the major shopping areas is shown below:



Local News Sources: The Press Democrat is the largest daily newspaper covering the entire region. Other print newspapers include the Sonoma County Gazette, Sonoma West Times, and the North Bay Business Journal. Other news sources include the major networks out of San Francisco plus local radio.

CRITERION #2: COMMUNITY IDENTITY, CONT'D

Analysis, Cont'd

Public Perception: It has been raised during the study that there are perceived community distinctions between the West vs East sides of the high school district. Hwy 101 bifurcates the region even though there are no barriers to transportation between east and west. And in this context and others, the preservation of the neighborhood schools is important to the elementary school districts.

One the goals of unification across the Hwy 101 “divide” might be to improve community identity through inclusion by providing opportunities to join in unique educational programs offerings outside the former elementary boundaries, plus greater intra-district attendance opportunities.

Neighborhood schools at the elementary levels could continue to reflect the local neighborhood identity. As with today, attendance at regional high schools would remain the same with opportunities to adjust attendance boundaries and provide magnet programs attractive throughout the district. Neighborhood elementary schools could continue to provide the unique neighborhood identity the elementary school districts desire to preserve post-unification.

Conclusion: The proposed unification appears to meet the criteria and would be organized on the basis of a substantial community identity. Of all the elementary districts, Kenwood might have the least community identity but if included in a proposal, the criteria would still be substantially met.

CRITERION #3: DIVISION OF PROPERTY

Statutory Requirement: The proposal will result in an equitable division of property and facilities of the original districts.

Regulations: This condition is addressed by State Board of Education regulations in CCR, Title 5, Section 18573(a)(3).

In reviewing the aspects of proposals dealing with school facilities, county committees may request long-range facilities plans from the affected school districts.

Those plans could include:

- a. Demographic studies showing both current and projected student population data;
- b. Development of “study area” maps showing census tracts, boundaries, current and proposed zoning, and current and projected residential and commercial/industrial development;
- c. An evaluation and report of the utilization, capacity, and condition of existing school facilities; and
- d. Development of a “comparison analysis” considering both existing and proposed divisions.

There are additional related *Education Code* provisions for the division of funds, property, and obligations. In particular, refer to *EC* sections 35560, 35564, and 35570 through 35579. If a dispute arises concerning the division of funds, property, or obligations, *EC* Section 35565 provides for binding arbitration of the dispute.

Analysis: This criterion is not applicable because the proposed unification would not result in a division of property and facilities. Upon unification, all the existing districts’ property would become the property of the new unified school district. If any one or more elementary district opted out of the unification, there would be no impact on their property or facilities.

Conclusion: The proposed unification would not result in a division of property or facilities of the original districts.

CRITERION #4: DISCRIMINATION OR SEGREGATION

Statutory Requirement: The reorganization of the districts will preserve each affected district's ability to educate students in an integrated environment and will not promote racial or ethnic discrimination or segregation.

Regulations: Pursuant to state law, local educational agencies have a constitutional obligation to prevent racial and ethnic segregation and to alleviate the harmful effects of segregation. (CCR Title 5 18573[a][4]) To determine whether the new districts will promote racial or ethnic discrimination or segregation, the effects of the following factors will be considered:

- a. The current number and percentage of pupils in each racial and ethnic group in the affected districts and schools in the affected districts, compared with the number and percentage of pupils in each racial and ethnic group in the affected districts and schools in the affected districts if the proposal or petition were approved.
- b. The trends and rates of present and possible future growth or change in the total population in the districts affected, in each racial and ethnic group within the entire district, and in each school of the affected districts.
- c. The school board policies regarding methods of preventing racial and ethnic segregation in the affected districts and the effect of the proposal or petition on any desegregation plan or program of the affected districts, whether voluntary or court ordered, designed to prevent or alleviate racial or ethnic discrimination or segregation.
- d. The effect of factors such as distance between schools and attendance centers, terrain, and geographic features that may involve safety hazards to pupils, capacity of schools, and related conditions or circumstances that may have an effect on the feasibility of integration of the affected schools.
- e. The effect of the proposal on the duty of the governing board of each of the affected districts to take steps, insofar as reasonably feasible, to alleviate segregation of minority pupils in schools regardless of its cause.

The following types of data are examples of relevant information that may be submitted in support of a petition: the district(s) enrollment statistics that specify the percentages of various ethnic groups; the district(s) enrollment statistics that specify the percentages of the various ethnic groups in each individual school; the district(s) enrollment statistics that specify the grade and ethnic groups of students; the type of attendance area served by a school (rural, suburban, or urban); and the trends in the district(s) total population and percent distribution by race.

Analysis: State law requires the reorganization of the districts to preserve each affected district's ability to educate students in an integrated environment and not promote racial or ethnic discrimination or segregation. Isolating a particular race or ethnicity through school district reorganization would be detrimental to the passage of any petition.

CW found that each school board has policies to prevent racial and ethnic segregation in their districts. Like most school districts, schools are centered in neighborhoods, each with a unique demographic profile. The high school demographics draw on larger geographical areas and are influenced by proximity to feeder school sites, facility capacity, and transportation routes.

CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Unification would consolidate the area into one district and would further the ability of the new district to promote integration and remove any barriers that segregate the current elementary school district structure. Integration policies need to be balanced with goals of retaining neighborhood schools, but new program opportunities might be created for students who want to participate.

If unified, the new district would have about 27,347 pupils, 57% Hispanic or Latino, 29% White, 5% Two or More Races, 4% Asian, 2% African American, and 1% each American Indian, Filipino, and Pacific Islander.

School Districts	Total Enrollment 2022-23	African American	American Indian	Asian	Filipino	Hispanic or Latino	Pacific Islander	White	Two or More Races	Not Reported
Bellevue	1,586	18	11	50	7	1,350	8	113	22	7
Bennett Valley	951	26	4	44	10	224	13	529	98	3
Kenwood	113	-	-	3	-	23	-	74	10	3
Mark West	1,305	7	8	32	17	411	10	732	88	-
Piner-Olivet	1,235	26	5	72	24	604	7	390	66	41
Rincon Valley	3,072	78	54	176	29	924	33	1,496	197	85
Roseland	2,766	18	7	27	4	2,620	2	53	29	6
Santa Rosa Elem	4,861	80	27	142	30	3,199	17	1,127	237	2
Santa Rosa High	10,179	192	76	476	119	5,502	89	3,159	541	25
Wright	1,279	32	14	98	10	834	8	212	71	-
Totals	27,347	477	206	1,120	250	15,691	187	7,885	1,359	172
Percentages	100.00%	1.74%	0.75%	4.10%	0.91%	57.38%	0.68%	28.83%	4.97%	0.63%

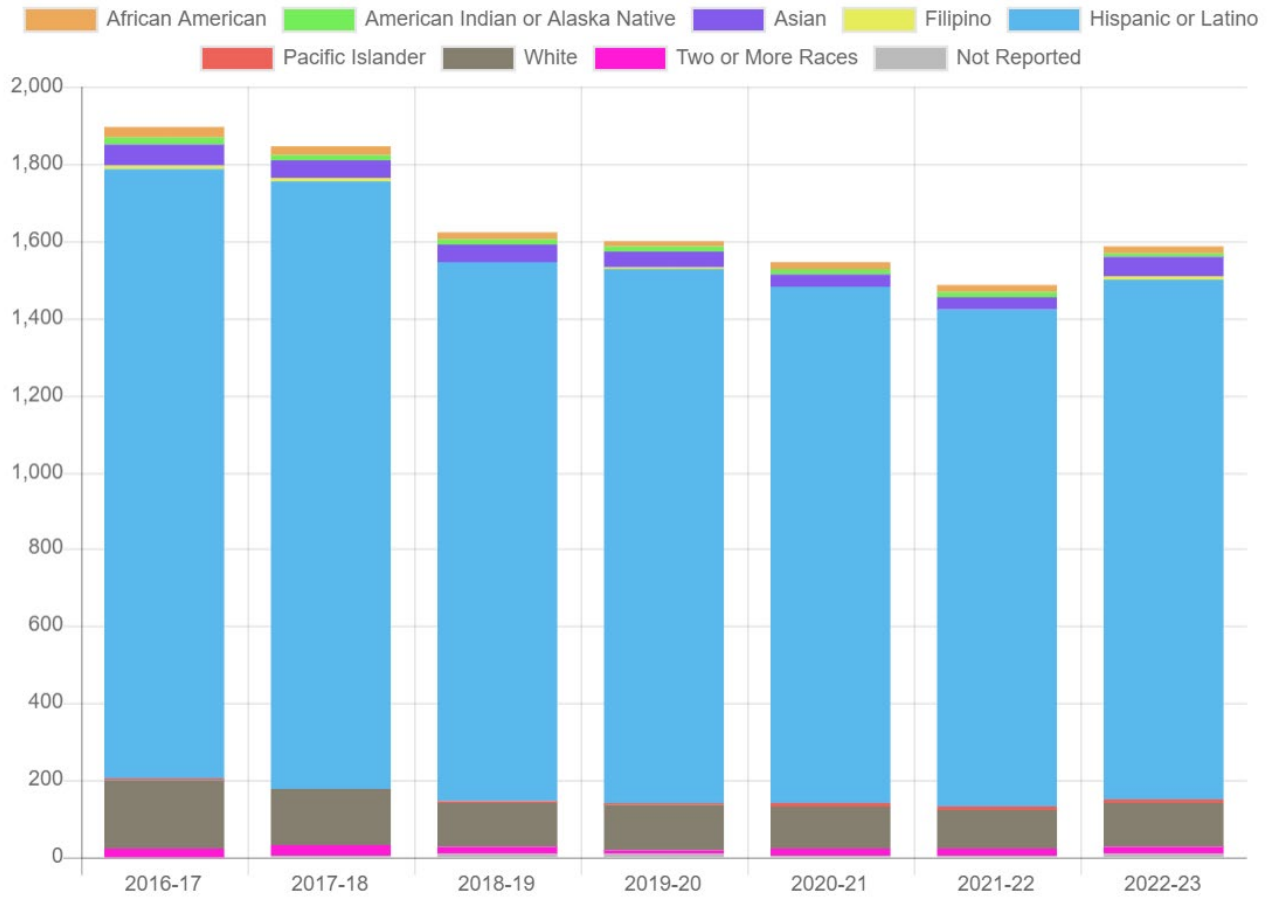
As shown on the following pages, by existing school district, enrollment has been declining overall and is becoming increasingly more Hispanic or Latino and less predominately White. The Asian race is a distant third largest group. Other ethnic groups and races are minor by comparison, e.g., American Indian, African American, Filipino, and Pacific Islander.

CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Bellevue School District: The District has experienced declining enrollment through 2021-22 but in 2022-23 rose by about 100 pupils to 1,586. In 2022-23 85% are Hispanic or Latino, up 1% from 84% in 2016-17. White at 7% and Asian at 3% are the next largest ethnic groups.

Enrollment by Ethnicity

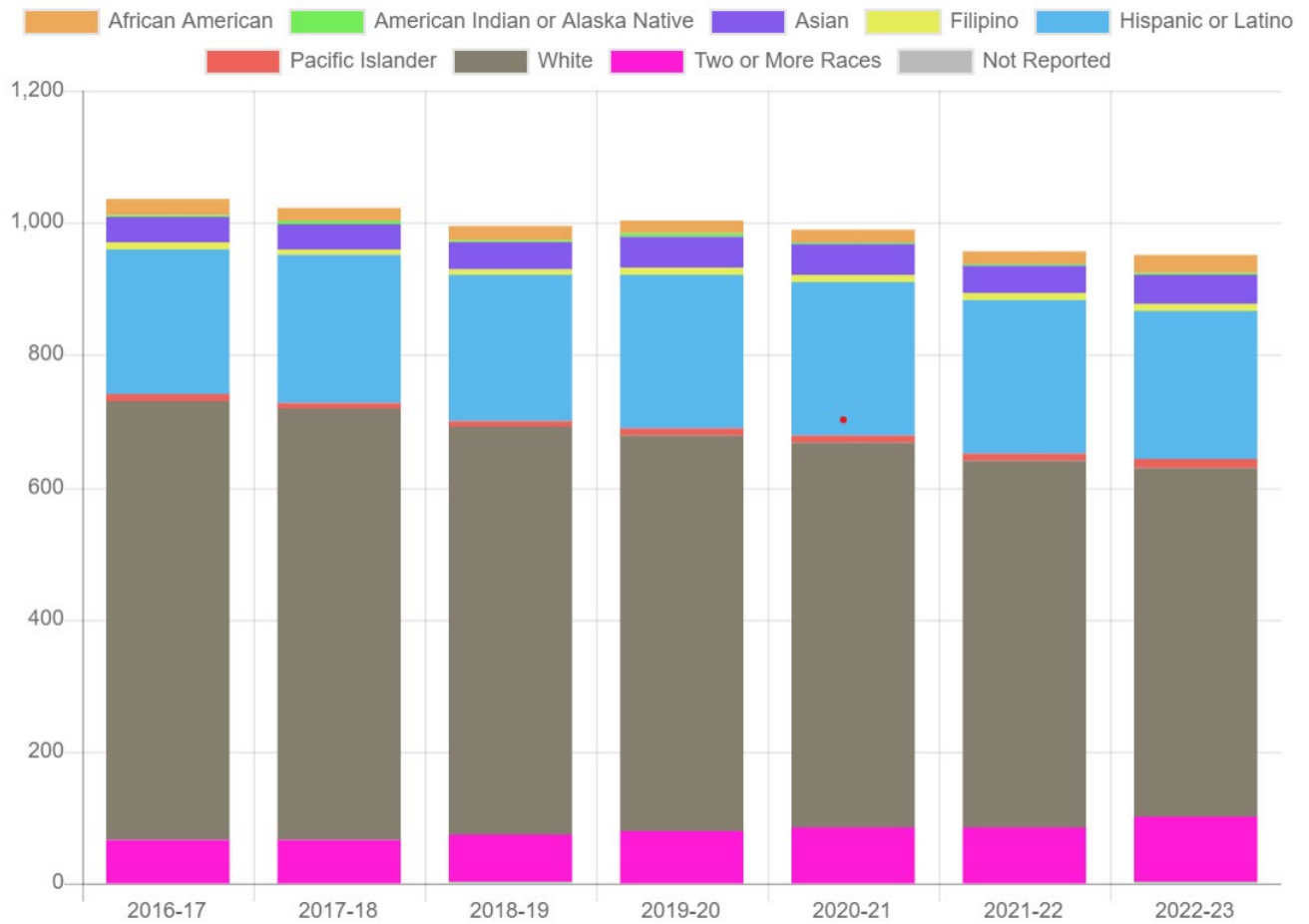


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Bennett Valley Union School District: The District has experienced declining enrollment of about 80 pupils over the past seven years to 951. In 2022-23 46% are White, down from 64% in 2016-17. Hispanic/Latino at 24%, Two or More Races at 10%, Asian at 5% and African American at 3% are the next largest ethnic groups.

Enrollment by Ethnicity

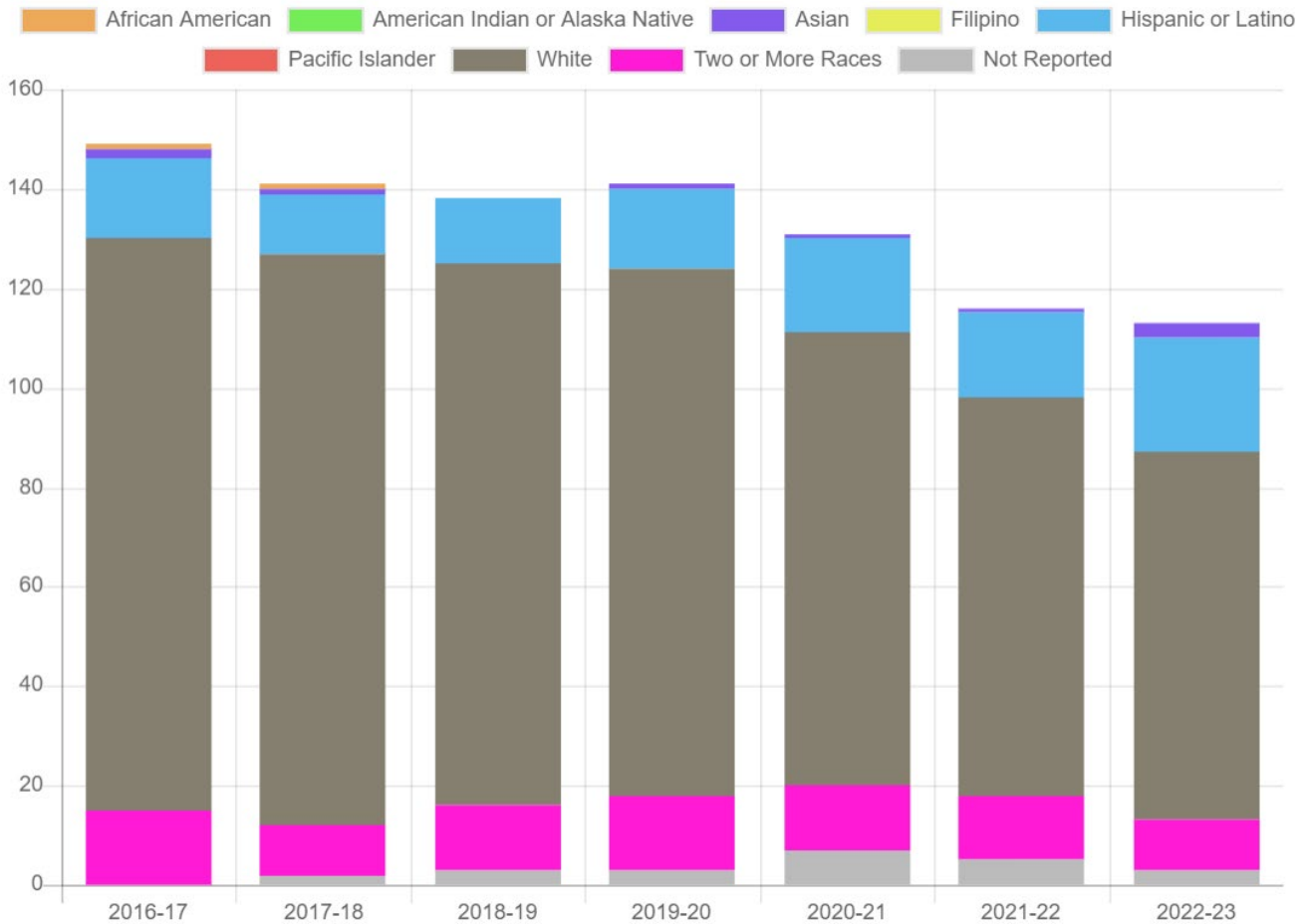


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Kenwood School District: The District has experienced declining enrollment of about 36 pupils over the past seven years to 113. In 2022-23 67% are White, down from 77% in 2016-17. Hispanic/Latino at 20%, Two or More Races at 9%, and Asian at 3% are the next largest ethnic groups.

Enrollment by Ethnicity

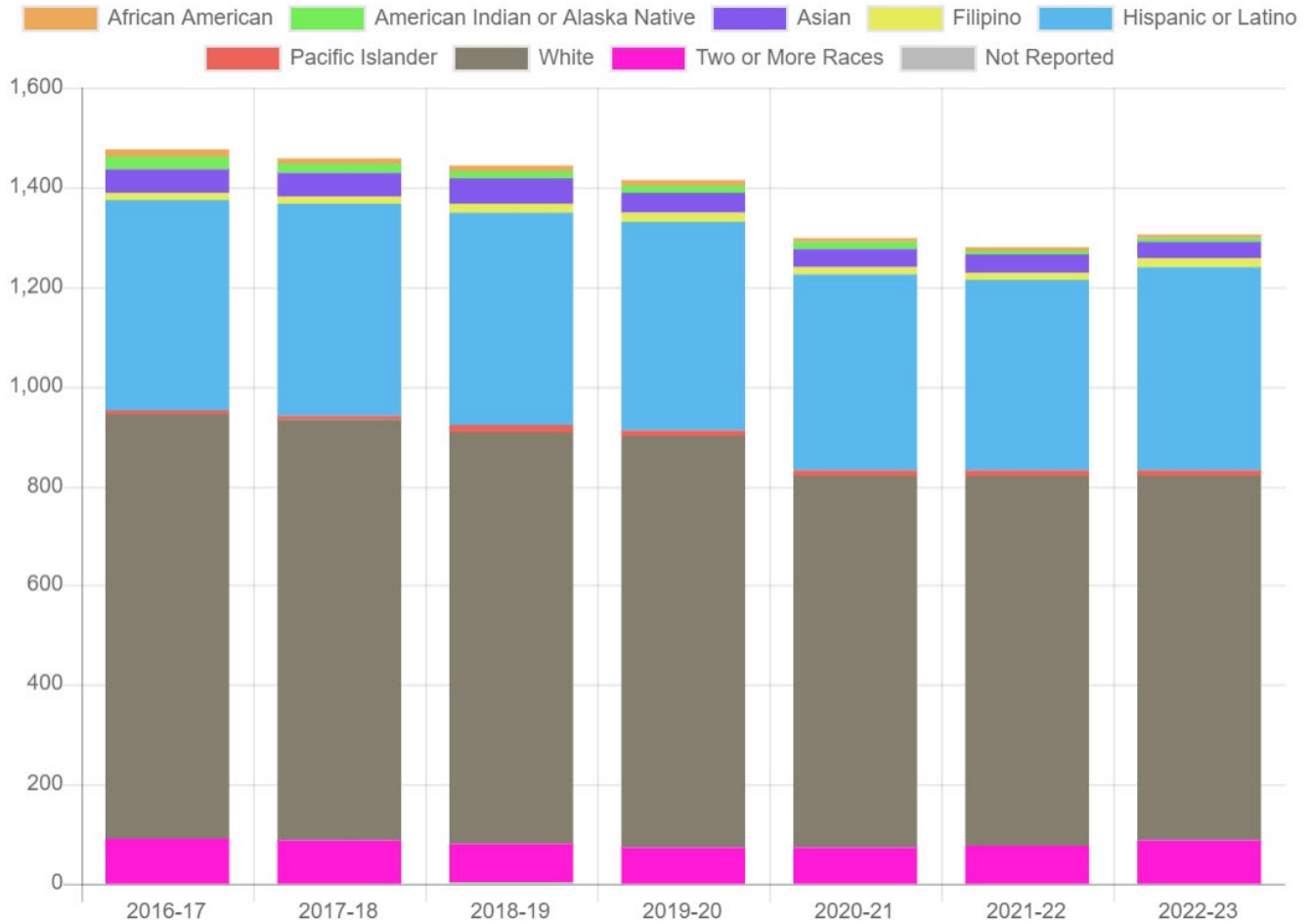


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Mark West School District: The District has experienced declining enrollment of about 170 pupils over the past seven years to 1,305. In 2022-23 56% are White, down from 59% in 2016-17. Hispanic/Latino at 32%, Two or More Races at 7%, and Asian at 3% are the next largest ethnic groups.

Enrollment by Ethnicity

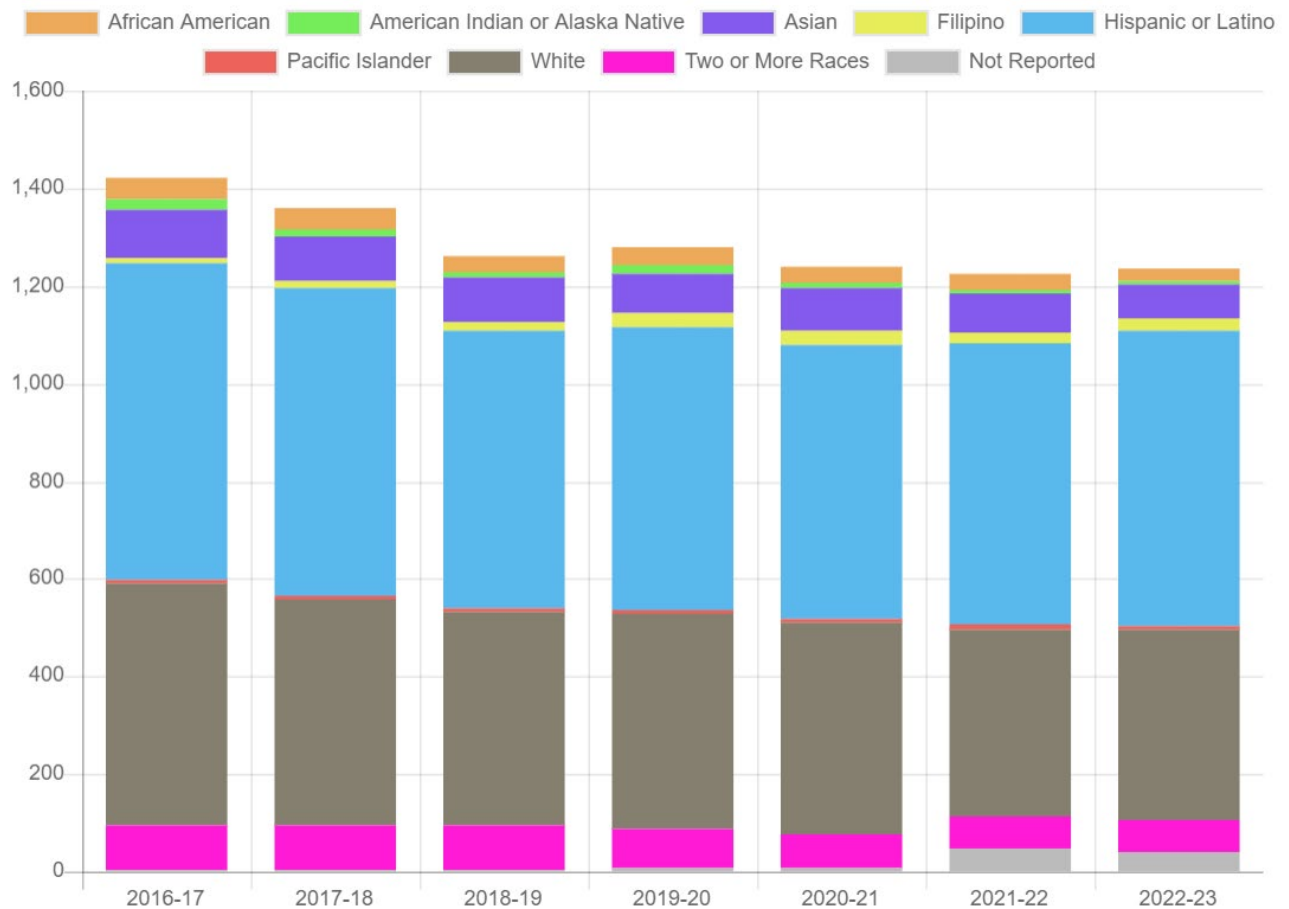


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Piner-Olivet Union School District: The District has experienced declining enrollment of about 187 pupils over the past seven years to 1,235, gaining 10 this past year. In 2022-23 49% are Hispanic or Latino, up from 45% in 2016-17. White at 32%, Two or More Races at 5%, Asian at 6% and Filipino and African American at 2% each, are the next largest ethnic groups.

Enrollment by Ethnicity

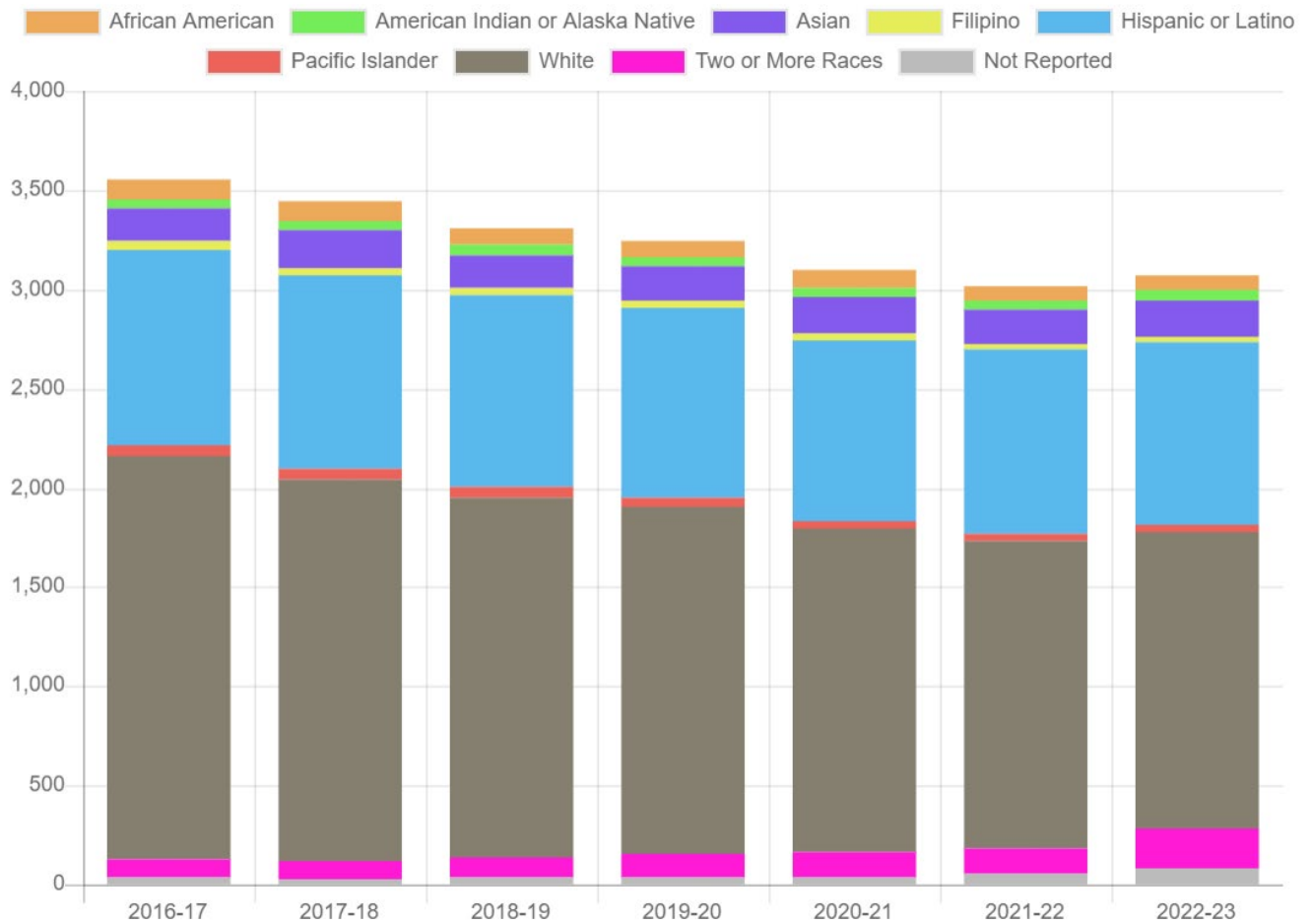


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Rincon Valley Union School District: The District has experienced declining enrollment of about 480 pupils over the past seven years to 3,072, gaining 52 this past year. In 2022-23 49% are White, down from 57% in 2016-17. Hispanic or Latino at 30%, Two or More Races at 6%, Asian at 6% and African American at 3% each, are the next largest ethnic groups.

Enrollment by Ethnicity

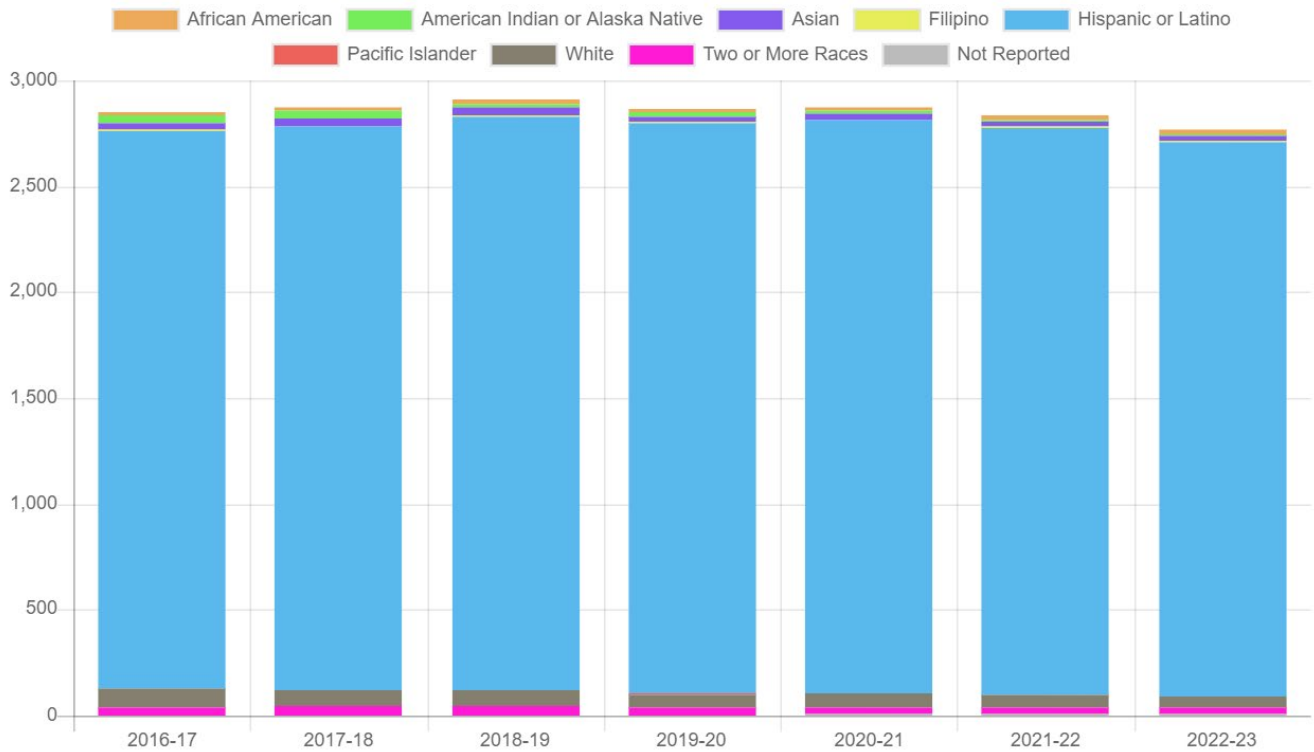


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Roseland School District: The District has experienced declining enrollment of about 86 pupils over the past seven years to 2,766. In 2022-23 95% are Hispanic or Latino, up from 92% in 2016-17. White at 2%, Two or More Races, Asian and African American at 1% each, are the next largest ethnic groups.

Enrollment by Ethnicity

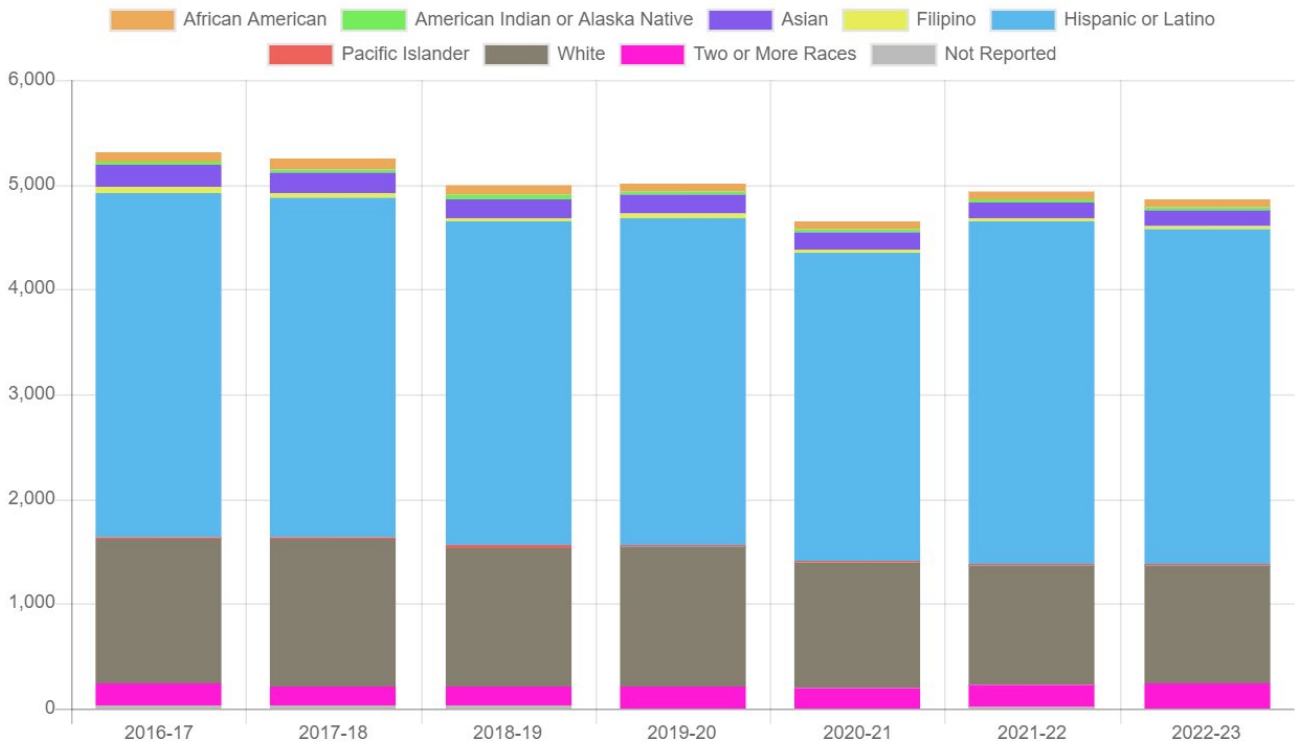


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Santa Rosa City Elementary School District: The District has experienced declining enrollment of about 454 pupils over the past seven years to 4,861. In 2022-23 66% are Hispanic or Latino, up from 62% in 2016-17. White at 23%, Two or More Races at 5%, Asian at 3% and African American at 2% each, are the next largest ethnic groups.

Enrollment by Ethnicity

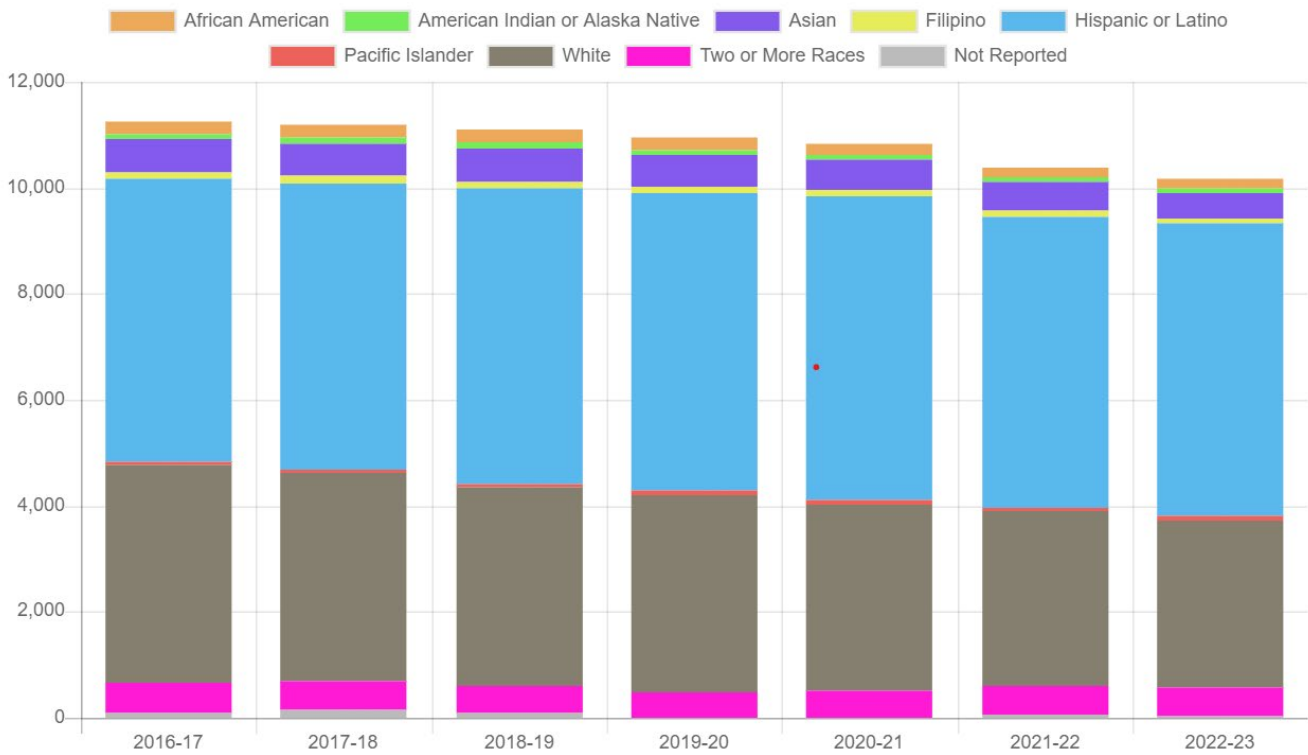


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Santa Rosa City High School District: The District has experienced declining enrollment of about 1,084 pupils over the past seven years to 10,179. In 2022-23 54% are Hispanic or Latino, up from 48% in 2016-17. White at 31%, Two or More Races and Asian at 5% each, African American at 2% and American Indian and Filipino/Pacific Islander at 2% each, are the next largest ethnic groups.

Enrollment by Ethnicity

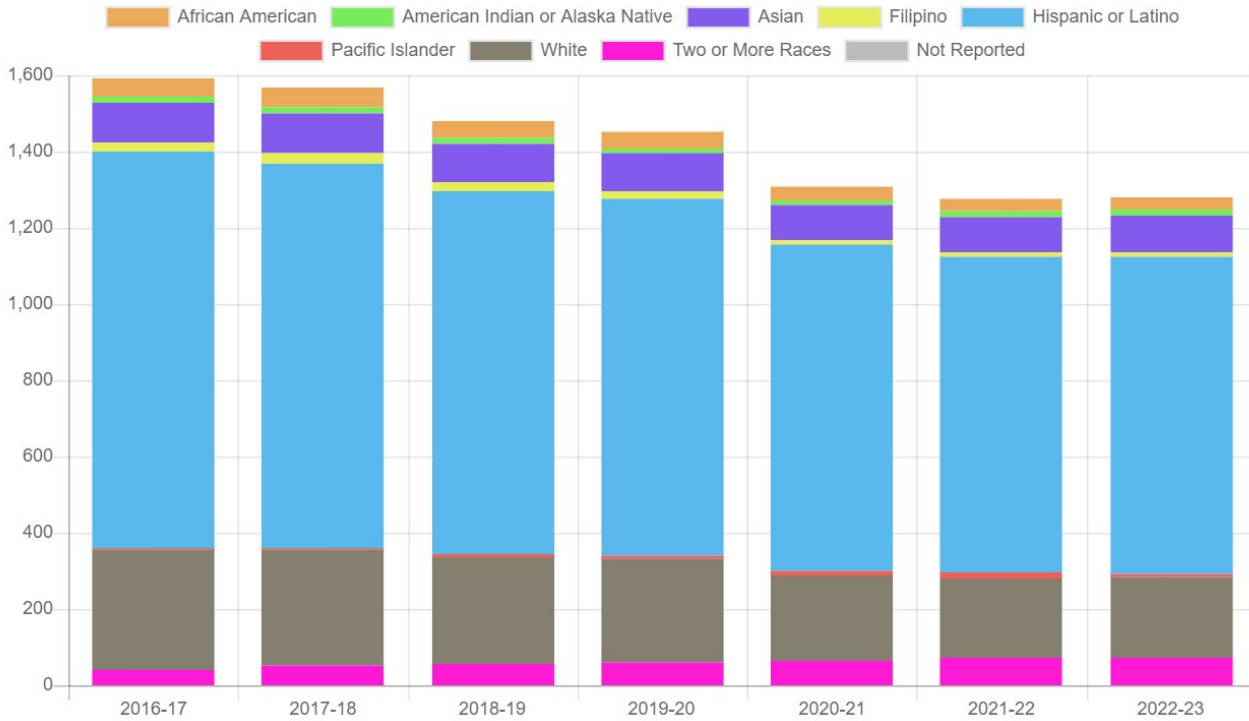


CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trends in Enrollment by Ethnicity (Source: CDE's DataQuest, CALPADS data)

Wright Elementary School District: The District has experienced declining enrollment of about 314 pupils over the past seven years to 1,279. In 2022-23 65% are Hispanic or Latino, the same as in 2016-17. White at 17%, Asian is 8%, Two or More Races 6% and African American at 3%, are the next largest ethnic groups.

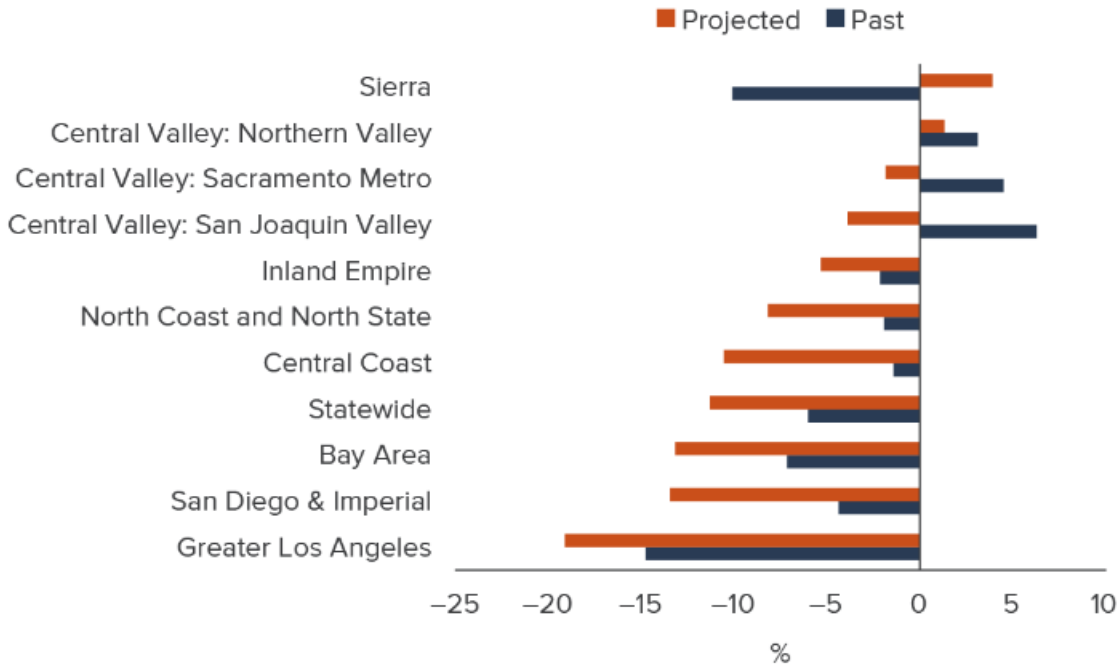
Enrollment by Ethnicity



CRITERION #4: DISCRIMINATION OR SEGREGATION, CONT'D

Trend in Enrollment: The North Coast and Bay Areas are projected to decline in enrollment over the next decade as illustrated in this chart from the Public Policy Institute of California:

Enrollment declines are projected in all but two California regions over the next decade



SOURCES: California Department of Finance; authors' calculations.

NOTES: Past declines from 2012–13 to 2022–23. Projected declines from 2022–23 to 2032–33. Regional changes constructed using county-level data. See Technical Appendix Table A1 for regional definitions.

The Department of Finance projects Sonoma County's total K-12 enrollment to be 54,623 in 10 years (Fiscal Year 2032-33), down 14% from fiscal year 2022-23. The Hispanic or Latino ethnic group is expected to grow the most over the coming years.

Conclusion: The studied unification of the districts will preserve each affected district's ability to educate students in an integrated environment and will not promote racial or ethnic discrimination or segregation.

CRITERION #5: COST TO STATE

Statutory Requirement: Any increase in costs to the state as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.

Regulations: There are no current regulations on this subject; however, some guidelines are presented that may assist the county committee in its review of proposals.

The following factors should be considered in evaluating this condition:

- a. Whether implementation of the proposal would change one or more of the affected districts' basic aid status.
A change in basic aid could increase the amount of state apportionment funds required for either the proposed new district or one or more of the remaining districts.
- b. Additional state costs for school facilities.
- c. Other state special or categorical aid programs and any increased state costs if students transferring would qualify in the gaining district and not in the losing district.
- d. The additional costs to the state if costs per student for special or categorical programs are higher in the gaining district.
- e. The effect on the districts' home-to-school and special education transportation costs and state reimbursements.
- f. Increased costs resulting from additional schools becoming eligible for "necessary small school" funding pursuant to *EC* sections 42280 through 42289.

Note that any increase in state funding due to recalculation of the Local Control Funding Formula entitlements as required by *EC* sections 35735 and 35735.1 does not apply to the analysis of this condition.

Analysis: As reported in the Financial Feasibility Study, October 2022, there would be no increase in cost to the State because of unification. In fact, there would be an estimated savings to the State of \$21M. Basic aid (community aid) dollars and supplemental grant funds would be lost in about equal proportion. No additional categorical eligibility would result. Transportation reimbursements would not increase.

Conclusion: There is no expected increase in costs to the state as a result of the proposed reorganization, and the state criterion is met.

CRITERION #6: EDUCATION PROGRAMS

Statutory Authority: EC Section 35753(a)(6): The proposed reorganization will continue to promote sound education performance and will not significantly disrupt the educational programs in the districts affected by the proposed reorganization.

Regulation: The proposal or petition shall not significantly adversely affect the educational programs of districts affected by the proposal or petition. In analyzing the proposal or petition, the California Department of Education shall describe the districtwide programs and the school site programs in schools not a part of the proposal or petition that will be adversely affected by the proposal or petition.

Analysis: To be met, this criterion requires the unification to not significantly disrupt the existing educational programs and to continue to promote sound educational performance. Demonstration of an improved educational outcome is not required to meet the criteria, but petitioners might consider this as a compelling reason to unify. And the analysis that follows points to areas where a unified model might foster educational improvements.

The regulation emphasizes identifying possible adverse effects on “schools not a part of the proposal.” If the petition were breaking up a district, you can see how this could be an issue, but that is not the case here. This proposal would unite all schools under one educational entity. The proposal would include all schools in the Santa Rosa area, even charters. (Note: Charters would need to be re-authorized by a new unified board or another school agency to continue operating after unification.)

The Unified School District Model of Education

A unified district is a widely preferred educational model due to improved articulation K-12, access to a central student information system (SIS), and more options to build out specialized programs. CW considered the unified model benefits when evaluating this criterion. We spoke with SRCS educators and reviewed the districts’ websites to glean information about current programs. CW also gathered state-reported testing results by district and school within each district.

- Note: All ten Santa Rosa school districts were invited to participate in this study. Participation included an opportunity to meet with CW and review existing educational programs. Only SRCS’s elementary and high school districts agreed to participate fully in the study. Bennett Valley and Rincon Valley met briefly with CW to discuss the study scope. As such, current program information from the other elementary schools was not provided directly to the consultant. However, study data was obtained from state reports and district websites.

There are debates on the ideal district size and grade configuration. But, in general, the K-12 unified district model, if of sufficient size to operate a comprehensive high school program, is considered a preferred model.

- The size might range from a small mid-sized school district (e.g., 2,500 pupils or more) to 50,000 pupils or more.
- Studies have even shown (summarized at the end of this analysis) that large districts do better with educational reforms and improvements. On the flip side, small school districts can provide smaller class sizes (assuming there is funding) and a community base, particularly in rural areas.

***So, the question is, would a unified school district in Santa Rosa with about 27,000 pupils continue to promote sound education performance?
CW concludes the answer is “yes” based on the following analysis.***

CRITERION #6: EDUCATION PROGRAMS, CONT'D

Articulation: This is cited as one of the primary positive educational benefits of unification. Organizations such as the UCLA Center for Mental Health in Schools, the National Association for Secondary School Principals, and the American Educational Research Association have published how strong curriculum articulation can help to ensure that students are building upon prior knowledge and skills in a logical and sequential manner. The single K-12 district model is more efficient and effective in promoting strong articulation.

Articulation can be viewed as:

1. **Curriculum Articulation:** This is the alignment and coherence of curriculum standards and expectations across different grade levels and subject areas within a school district. Strong articulation ensures that students build upon prior learning and progress smoothly through the educational system. It helps prevent knowledge gaps, content repetition, and confusion for students.

Study Observation: There are nine (9) elementary school districts that need to align with the high school district's curriculum to ensure the prior learning and progression continues when transferring to secondary grades. Today, regular meetings with all affected districts help smooth that transition, but time and resource constraints are limiting factors. A single district under the leadership of a single board and educational services leaders is optimal for curriculum articulation.

2. **Transition Support:** For students transitioning between different levels of education (e.g., elementary to middle school and middle school to high school), articulation provides support systems and programs to ensure a smooth and successful transition. This can involve sharing student data, coordinating schedules, offering orientation programs, and providing academic and social support. Onboarding of new secondary students is more time-consuming without good transition support.

Study Observation: Without access to a single Student Information System (SIS), it is difficult to track individual student progress when a pupil moves from elementary to secondary levels. Educational gaps can result from teachers not being aware of past resources/outcomes, attendance patterns, and special needs. Other transition support considerations include:

- **Middle School Grade Configurations:** There are advantages of grade 6-8 middle schools in helping early adolescents with a smoother transition to high school. Presently, the high school district only offers grade 7 and above. Post-unification, a middle school configuration could be adopted.
- **Individual Student Learning Needs:** Identifying early on individual students with differential learning needs, such as reading or math support, or special education might be more readily accomplished in a single school system K-12 with more seamless transition support.

3. **College and Career Articulation:** Articulation also relates to partnerships and agreements between school districts and colleges, universities, or vocational training programs. These partnerships align curriculum standards and learning experiences with future education and career pathways. This can benefit students by making their transition to further education or employment smoother and more successful.

Study Observation: SRCS already partners with local higher educational institutions (e.g., Sonoma State University and Santa Rosa Junior College) and job training and exploration programs (e.g., the Career Technical Education Center at SRCS). A unified school district structure can more readily allow for career counseling to start at earlier grades.

CRITERION #6: EDUCATION PROGRAMS, CONT'D

Specialized Staffing

At the district level, the larger unified district can create or expand department specialties to better serve diverse educational needs. And with that specialization, can recruit employees that are attracted to an opportunity to use their skills. For example, specialization areas such as, student wellness and health, counseling, cultural responsiveness training, and reading or math interventions.

At the school level there might be more options for “schools within schools.” Such as career pathways, STEM, dual language immersion and common interest groups. These can boost the student’s school experience, improve academic outcomes, provide for innovation, and build smaller supportive communities around common interests.

In *Coming Together: The Pros and Cons of School Consolidation* (author: University of Dayton eCommons, Department of Educational Leadership, 2008), the author said, “one of the primary benefits of school consolidation is that school board can provide more, and more enriched, curricular offering to students by combining resources.” In addition, other positives of unification included attracting personnel and providing more student services, more staff development, an expanded curriculum, a more diverse student enrollment, and economic efficiencies.”

According to local SRCS educators CW spoke with, program economies of scale result in better educational services. Limited resources are best used, and more students can be served.

- Examples in Fresno Unified were mentioned where the district partners with community groups to provide equity and access to African Americans, decrease suspension rates, engage with bridge programs, and reduce overidentification in Special Education programs due solely to race and ethnicity. In addition, accelerated learning is offered to all pupils identified at an early age.

Parent Support in One Common Unified District

In a single-school system, parents with more than one school-age child might keep the sibling connection better. Sibling connection, if positive, can provide more social support, a sense of belonging, and confidence and reduce bullying.

One unified district would have a single school calendar, common policies, and resources. Accessing specialized programs for their child through dedicated departments could help parents connect with resources.

School safety might benefit from a single point of contact for parent communication (e.g., text, calls, and mobile apps), safety procedure updates, drills, and threat protocols. A larger district could have more dedicated law enforcement support, training, equipment, and department specialization.

Instructional Professional Development

Today SRCS, as a larger district, has access to more professional development opportunities than most small districts can afford. For example, SRCS has funding for Guided Language Acquisition Learner (GLAD) training to help integrate language development throughout the curriculum. The district has also worked with Jim Bower (well-known math curriculum expert), teachers on special assignments, intervention support teachers and national training networks. These resources might be shared area-wide if unified, just like the “best of” programs from the feeder elementary school districts could be shared.

CRITERION #6: EDUCATION PROGRAMS, CONT'D

Information Systems Supporting Education

In speaking the current SRCS Technology Department staff they are well structured to provide support to a larger unified district. Added additional frontline support for tech desk support would be needed with the increase in users. But, the district has up to date systems, good data integrity and the “programming side scales well.” One benefit of consolidation is that there are specialists in areas such as CalPads, the SIS, and Testing Coordination. This is hard to manage at a site level and benefits from a larger specialized department. SRCS also has programmers on staff.

Current Educational Offerings

Below is a general overview of the current educational offerings and how unification might affect these offerings. There is no reason the ‘best of’ programs can’t be kept after unification if there is good board, administration, and instructional leadership.

- Every school district in California must implement the state-board adopted **Content Standards and Curriculum Frameworks**, so there is consistency district to district in teaching core subjects. Also, the use of instructional materials must align with state standards.
- It appears all current school districts offer:
 - Transitional kindergarten as required under State law.
 - Multi-tiered systems of support and intervention
 - English Language Learner (ELL) programs including the dual immersion program at Kawana Springs School or Roseland’s Structured English immersion program.
 - And options such as independent study, after-school enrichment, advanced learners/gifted programs, and arts and music.
- At the high school level, there is **career technical education**, college and career centers, world languages, visual and performing arts, magnet programs such as International Baccalaureate, ArtQuest, and university center partnership with Sonoma State University and Santa Rosa Junior College,
- Several districts like Rincon Valley, Kenwood, and Mark West have **educational foundations** to supplement district-paid programs. And community-wide foundations, like the Community Foundation of Sonoma County and Entrepreneurs of Tomorrow provide grants and scholarships. More students might benefit from these resources if a single district were formed.
- **Early childhood education**, including preschool, Head Start, special education, and supplemental programs, all exist and could be coordinated district-wide post-consolidation.
- **Accelerated programs**, including GATE, may be more accessible with a larger student population in which to build a course schedule.
- **Visual and performing arts** could be replicated with expanded access in a larger district.

CRITERION #6: EDUCATION PROGRAMS, CONT'D

Input from Educators

CW met with educators at SRCS. They cited potential benefits of unification that are summarized here:

- **Optimization of specialized programs** to support students academically and expand offerings. For example, greater access to advanced placement courses, sports, visual and performing arts district-wide to help achieve student equity goals.
 - The new unified board could keep effective programs post-unification and expand district wide. For example, dual immersion.
 - The point was made that having more program options would not diminish the existing programs.
 - Implementing new programs is easier in a larger district with more flexible resources combined with an interested group of educators and students. New programs can happen alongside smaller school community goals. For example, the present high schools each have a unique focus (e.g. college connection, performing arts), and use of intra-district transfers to allow for access throughout Santa Rosa.
- A common **Student Information System (SIS)** can help with student placement and educational success by providing pupil history to teachers. For example, knowing whether reading intervention was provided, or if attendance problems were present at the elementary level, that are now observed at the middle school level.
 - According to a group of Principals interviewed, educational gaps can happen if you don't share the same SIS. All the school districts have multi-tiered student support (MTSS) systems, but the implementation and use of MTSS might be uneven absent complete student information.
 - Teachers could look at hallmarks indicating a student might drop out. They could look for the "cool out" period before they drop and intervene before that happens. Good attendance is fixed in the early grades, and a unified attendance support system is beneficial to keep pupils on track for graduation.
- SRCS has an entire department called **Wellness and Engagement** at SRCS that supports students and families in the community, using interdisciplinary methods to improve student well-being.
 - For example, they employ transfers (inter and intra), restorative practices, mental health and wellness, truancy intervention, and handle serious discipline issues. Practices like Positive Behavior Intervention and Support are deployed.
 - The center conducts student threat assessments, such as harm to self and others. In this way, the goal is to know early on of potential issues and provide intervention services.
 - SRCS has experts in foster care issues, homelessness, and access to legal services.
- One educator said that a K-12 district would help with the transition from elementary to middle and then high school. There would be more **educational accountability** and discipline if issues were addressed earlier and prior to middle and high school grades.
 - For example, special education identification and access to mental health services. A separate department makes it easier for parents to access early intervention and prevention services.

CRITERION #6: EDUCATION PROGRAMS, CONT'D

California Dashboard (source CDE): The California DASHBOARD is designed “to help parents and educators identify strengths and areas for improvement” and is part of the educational accountability system in the State. School districts may use these measurements to identify student groups for additional support. The scoring system uses data from various sources including Smarter Balanced Summative Assessments and California Alternative Assessments plus rates of chronic absenteeism and graduation.

The State uses a color-coding system of Red for very low performance, Orange for low, Yellow for medium, Green for high and Blue for very high. The Statewide average at the bottom of the chart below shows Low performance in English Language Arts and Math, and medium performance for English Learner Progress.

Among the Santa Rose area districts, Kenwood and Rincon Valley ranked the highest in performance and Roseland, Piner-Olivet and Wright ranked among the lowest. However, there are more educational needs in these lower ranked districts with higher ELL and low-income populations. And improvements are noted; for example, Wright has a high performance in English Language acquisition, Roseland improved Math performance by 14.8 points, and Piner-Olivet improved English Language acquisition by 8.8 points year over year.

California School DASHBOARD 2023 (Source: CDE)									
	English Language Arts		Mathematics		English Learner Progress				
School Districts	Performance	Points Change	Performance	Points Change	Performance	Points Change	Implementation of Academic Standards	English Learner %	Socioeconomically Disadvantaged
Bellevue Union	Medium	13.9	Medium	13.8	Low	-4.1	Met	57.80%	81.70%
Bennett Valley	High	-2.2	High	4	Medium	-2.4	Met	13.40%	22.00%
Kenwood	High	13.3	Very High	16.4	State (less than 11 pupils)	n/a	Met	8.00%	23.90%
Mark West	Medium	-1.7	High	10.4	Medium	-3.6	Met	14.60%	48.70%
Piner-Olivet	Low	-5.5	Low	-4.1	50% Making Progress	8.8	Met	20.60%	60.60%
Rincon Valley	High	-6.5	High	2.4	High	23.5	Met	11.30%	25.80%
Roseland	Low	-3.1	Medium	14.8	Low	-7.5	Met	71.80%	84.70%
Santa Rosa City	Medium	7.4	Low	5.5	Low	-2	Met	21.40%	52.20%
Wright	Low	-8.4	Low	1	High	3	Met	39.40%	70.40%
Statewide Average	Low	-1.4	Low	2.6	Medium	1.6	n/a	19.00%	61.50%

CRITERION #6: EDUCATION PROGRAMS, CONT'D

California Assessment of Student Performance and Progress (CAASPP) Comparisons

The CAASPP, which stands for California Assessment of Student Performance and Progress, is a standardized testing system used in California for students in grades 3-8 and 11. It measures student performance in English language arts/literacy (ELA) and mathematics based on the California State Standards. The purpose is to measure student mastery of California State Standards in ELA and Math, and to track progress over time.

CW compared the Santa Rosa area school sites on recent CASPP scores for English Language Arts/Literacy and Mathematics, as shown in the tables in the next two pages. The scores are tabulated by the State, and a range of Levels 1-4 are computed on a percentage basis. Level 4 is the highest score and Level 1 the lowest.

On average Santa Rosa schools scored a combined 40% at Level 3 (met the standard) plus Level 4 (exceeded the standard) for English and 31% for Mathematics. For individual school sites, the range for English scores met or exceeded at Levels 3 and 4 ranged from a low of 9.42% (Abraham Lincoln) to a high of 81.75% (Santa Rosa Accelerated Charter). For math, a low of 6.35% (Elsie Allen) to a high of 83.47% at Santa Rosa Accelerated Charter.

However, test scores alone are not a reliable indicator of educational program quality since factors such as limited English language proficiency and low income can affect student performance negatively. According to the Association for Supervision and Curriculum Development, standardized achievement tests supply evidence to make norm-referenced interpretations of students' knowledge and/or skills in relationship to those of students nationally but should not be used to measure educational quality.

This study found that the districts with better scores had the lowest Unduplicated Pupil Counts (UPC) (fewer ELL and higher income levels). And conversely, high UPC districts with more educational needs had lower test scores, by comparison.

CRITERION #6: EDUCATION PROGRAMS, CONT'D

English Language Arts/Literacy Achievement Level, 2022-23					
School District/School Site		Standard Exceeded (Level 4)	Standard Met (Level 3)	Standard Nearly Met (Level 2)	Standard Not Met (Level 1)
Bellevue	Bellevue Elem	13.74%	17.54%	19.91%	48.82%
	Kawana Springs Elem	6.98%	16.28%	17.83%	58.91%
	Meadow View Elem	4.52%	16.29%	28.51%	50.68%
	Taylor Mountain Elem	10.79%	17.01%	26.97%	45.23%
Bennett	Strawberry Elem	26.02%	36.04%	24.12%	13.82%
	Yulupa Elem	38.69%	25.55%	24.82%	10.95%
Kenwood	Kenwood	38.81%	22.39%	17.91%	20.90%
Mark West	Mark West Charter	16.22%	36.94%	24.32%	22.52%
	John Riebli	12.44%	29.19%	24.40%	33.97%
	Mark West	21.63%	29.81%	26.44%	22.12%
Piner-Olivet	San Miguel	24.20%	26.03%	25.57%	24.20%
	Piner-Olivet Charters	14.76%	30.95%	25.71%	28.57%
	Jack London	9.03%	24.31%	20.14%	46.53%
Rincon Valley	Austin Creek Elem	57.61%	23.91%	14.67%	3.80%
	Binkley Elem Charter	15.59%	27.96%	30.65%	25.81%
	Madrone Elem	17.97%	27.65%	22.12%	32.26%
	Manzanita Elem	13.16%	23.25%	27.63%	35.96%
	Sequoia Elem	23.77%	25.56%	26.46%	24.22%
	Spring Lake Charter	24.20%	36.30%	23.84%	15.66%
	Village Elem Charter	23.39%	27.06%	24.77%	24.77%
	Whited Elem Charter	13.95%	26.98%	28.37%	30.70%
	Rincon Valley Partnership	7.69%	15.38%	15.38%	61.54%
	Roseland	Roseland Creek	7.38%	17.21%	26.23%
Roseland Elem		9.35%	19.16%	30.37%	41.12%
Roseland Charter		11.40%	33.28%	30.24%	25.08%
Sheppard Elem		11.96%	24.54%	23.01%	40.49%
Santa Rosa Elem	Abraham Lincoln Elem	2.17%	7.25%	23.19%	67.39%
	Albert Biella Elem	5.52%	16.55%	26.21%	51.72%
	Brook Hill Elem	5.63%	16.88%	24.38%	53.13%
	Cesar Chavez Elem	5.32%	19.77%	27.74%	47.18%
	Helen Lehman Elem	2.25%	18.92%	24.32%	54.50%
	Hidden Valley Elem	31.99%	31.03%	19.83%	17.24%
	James Monroe Elem	4.23%	17.46%	21.16%	57.14%
	Luther Burbank Elem	10.44%	24.73%	23.63%	41.21%
	Proctor Terrance Elem	18.89%	30.00%	26.67%	24.44%
	Steele Lane Elem	1.63%	11.41%	22.28%	64.67%
	SR Charter School for the Arts	15.20%	28.40%	22.00%	34.40%
	SR French American Charter	31.73%	25.48%	26.92%	15.87%
	Santa Rosa High	SR Accelerated Charter	41.27%	40.48%	13.49%
Santa Rosa High		21.02%	28.83%	26.13%	24.02%
Elsie Allen High		7.18%	25.13%	30.26%	37.44%
H. Slater Middle		6.46%	17.87%	30.63%	45.05%
H. Comstock Middle		2.70%	15.95%	22.97%	58.38%
Learning House		16.67%	33.33%	25.00%	25.00%
Maria Carillo High		37.21%	34.63%	13.44%	14.73%
Montgomery High		16.12%	28.21%	22.71%	32.97%
Piner High		16.16%	27.27%	22.56%	34.01%
Ridgeway High (Continuation)		0.00%	10.09%	27.52%	62.39%
Rincon Valley Middle		18.07%	28.80%	19.29%	33.83%
Santa Rosa Middle		4.92%	12.98%	26.17%	55.93%
SR District Level Program		4.17%	20.83%	8.33%	66.67%
Wright	J.X. Wilson Elem	14.29%	26.11%	33.50%	26.11%
	Wright Charter	10.31%	27.15%	33.68%	28.87%
	Robert Stevens Elem	22.31%	34.26%	25.50%	17.93%
Average English Language Arts/Literacy		15.72%	24.38%	24.07%	35.83%

CRITERION #6: EDUCATION PROGRAMS, CONT'D

Mathematics					
School District/School Site		Standard Exceeded (Level 4)	Standard Met (Level 3)	Standard Nearly Met (Level 2)	Standard Not Met (Level 1)
Bellevue	Bellevue Elem	13.74%	17.54%	19.91%	48.82%
	Kawana Springs	2.29%	6.87%	22.90%	67.94%
	Meadow View Elem	4.91%	16.07%	24.11%	54.91%
	Taylor Mountain Elem	10.79%	17.01%	26.97%	45.23%
Bennett	Strawberry Elem	20.11%	26.36%	34.24%	19.29%
	Yulupa Elem	31.39%	29.93%	27.01%	11.68%
Kenwood	Kenwood	34.33%	28.36%	16.42%	20.90%
Mark West	Mark West Charter	25.45%	22.73%	23.64%	28.18%
	John Riebli	7.66%	24.40%	31.10%	36.84%
	Mark West	18.75%	24.04%	30.77%	26.44%
	San Miguel	21.36%	24.55%	31.82%	22.27%
Piner-Olivet	Piner-Olivet Charter	20.85%	21.80%	23.22%	34.12%
	Jack London	11.72%	16.55%	19.31%	52.41%
Rincon Valley	Rincon Valley Union	20.21%	22.75%	28.49%	28.55%
	Austin Creek Elem	60.33%	19.02%	13.04%	7.61%
	Binkley Elem Charter	10.58%	22.75%	36.51%	30.16%
	Madrone Elem	20.18%	22.02%	24.31%	33.49%
	Manzanita Elem	8.30%	22.27%	30.57%	38.86%
	Sequoia Elem	25.56%	27.35%	26.01%	21.08%
	Spring Lake Charter	17.14%	20.71%	31.07%	31.07%
	Village Elem Charter	17.57%	26.13%	31.98%	24.32%
	Whited Elem Charter	9.77%	23.26%	33.02%	33.95%
	Rincon Valley Partnership	0.00%	0.00%	15.38%	84.62%
Roseland	Roseland Creek	7.32%	11.79%	27.24%	53.66%
	Roseland Elem	6.42%	21.56%	36.24%	35.78%
	Roseland Charter	6.98%	16.39%	30.35%	46.28%
	Sheppard Elem	8.81%	20.97%	29.48%	40.73%
Santa Rosa Elem	Abraham Lincoln Elem	3.62%	3.62%	22.46%	70.29%
	Albert Biella Elem	4.11%	16.44%	28.08%	51.37%
	Brook Hill Elem	3.66%	7.32%	29.88%	59.15%
	Cesar Chavez Elem	3.51%	9.52%	19.37%	67.61%
	Helen Lehman Elem	3.57%	13.39%	29.46%	53.57%
	Hidden Valley Elem	24.68%	28.14%	25.11%	22.08%
	James Monroe Elem	7.94%	8.99%	25.93%	57.14%
	Luther Burbank Elem	13.90%	20.86%	29.41%	35.83%
	Proctor Terrance Elem	13.26%	26.52%	30.94%	29.28%
	Steele Lane Elem	0.52%	11.40%	22.80%	65.28%
	Santa Rosa Charter for the Arts	8.00%	20.00%	29.20%	42.80%
Santa Rosa High	SR French American Charter	31.73%	25.48%	26.92%	15.87%
	Santa Rosa High (District)	11.22%	12.64%	20.12%	56.01%
	SR Accelerated Charter	58.27%	25.20%	11.81%	4.72%
	Santa Rosa High	8.08%	19.87%	22.22%	49.83%
	Elsie Allen High	0.53%	5.82%	14.81%	78.84%
	H. Slater Middle	4.96%	10.38%	26.02%	58.65%
	H. Comstock Middle	1.30%	5.96%	15.28%	77.46%
	Learning House	16.67%	33.33%	25.00%	25.00%
	Maria Carillo High	37.21%	34.63%	13.44%	14.73%
	Montgomery High	16.12%	28.21%	22.71%	32.97%
	Piner High	2.47%	5.35%	17.28%	74.90%
	Ridgeway High (Continuation)	0.00%	0.00%	3.67%	96.33%
	Rincon Valley Middle	20.43%	16.91%	21.38%	41.27%
	Santa Rosa Middle	4.89%	10.00%	21.11%	64.00%
Santa Rosa District Level Program	0.00%	4.55%	4.55%	90.91%	
Wright	J.X. Wilson Elem	8.37%	19.21%	36.45%	35.96%
	Wright Charter	4.65%	13.62%	33.89%	47.84%
	Robert Stevens Elem	16.67%	24.60%	33.73%	25.00%
Average Mathematics		13.80%	18.13%	24.79%	43.28%

A RECAP OF STUDIES REVIEWED

In addition to state-wide reported data, website information and educator interview, CW used several selected studies in our analysis to consider the question of district size and a unified K-12 configuration. Here is a recap and the citations:

Big Isn't Always Bad: School District Size, Poverty and Standards-Based Reform (authors: The Urban Institute and the US Department of Education, 1998): This was a national survey, a few of the key points in this study include:

- Regarding success in education reform, “We find that not only do districts appear to play an important role, but bigger districts also appear to be particularly successful in promoting reform. Those who see reform as an exclusively state-school process may miss key ingredients for success. It is also a mistake to assume that large districts are not responsive. The benefits of larger size, however, appear to be moderated in high-poverty districts.”
- This study found that larger districts were able to decrease administrative costs as size increased, had more specialized positions and subunits, had created efficiencies and were able to implement new reforms while allowing for decentralized decision-making.
- In terms of student outcomes, the research acknowledged that on the far ends of the size spectrum (i.e., very large or very small districts), there was a greater risk of possible negative educational consequences. However, poverty was the single most contributing factor to negative educational outcomes.

Study Observation: An SRCSD Unified would be on the cusp of being considered a large district, at about 27K students, but far from being very large. The district would rank about 40th in size in California. Looking at this study, it could be optimal to have a district the size of an SRCSD Unified that is large but not unwieldy. Large enough to realize the benefits of administrative efficiencies, specializations, and the resources for educational reforms but not so large to risk a lack of educational accountability, especially due to poverty factors.

Coming Together: The Pros and Cons of School Consolidation (source: University of Dayton eCommons, Department of Educational Leadership, 2008): This article states that:

- “One of the primary benefits of school consolidation is that the school board can provide more, and more enriched, curricular offering to students by combining resources.”
- Other positives included attracting personnel and providing more student services, more staff development, an expanded curriculum, a more diverse student enrollment, and economic efficiencies.
- “Daily interaction of students from different communities enriches the school environment, resulting in a more informed and culturally aware student body.”
- The article did acknowledge that the benefits of smaller schools might include community identity in a rural area, a positive school environment, smaller class sizes, and access to more individual attention.

A RECAP OF STUDIES REVIEWED, CONT'D

How Small is Too Small? An Analysis of School District Consolidation (California Legislative Analyst Office (LAO), 2011): In this study, the LAO looked at competing claims on the benefits of increasing small district size by encouraging consolidation. They did not find sufficient pervasive evidence to change state policy (which is to not interfere with local decisions) or to provide funding to incentivize school consolidation. They found that small school districts could find economies through county offices and consortia services but still spent a disproportionate amount of funding on “overhead.” In addition, student performance was slightly better in “midsize districts.” Of concern were the very small districts with less than 100 pupils, which is not an issue in this study.

Conclusion: The proposed unified would substantially meet the criterion of Educational Performance. There would be no significant disruption since all school sites would be included in the unified district (even if an elementary school district opted under the Thomspson provisions to remain independent for elementary educational purposes.) And a K-12 district with about 27,000 students could continue to promote a sound education.

CRITERION #7: SCHOOL HOUSING COSTS

Statutory Requirement: Any increase in school facilities costs as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.

Regulations: No regulations have been adopted on this subject; however, a good plan should provide a concise analysis of the availability of school facilities to house the pupils in the portion of the district being reorganized.

If the reorganization is to create a new school district, the school facilities must be adequate to serve all grade levels. If an elementary school district is unifying, there should be a plan for secondary school facilities. Formerly, plans have been approved in which the newly unified school districts phase in secondary school programs. When the reorganization is a territory transfer, the plan should address whether the school district receiving the new students has adequate facilities to house them. If new facilities are required in either of the above cases, the plan should address how the facilities will be funded.

Analysis: Unification would consolidate the facilities and not create any new school housing needs that didn't pre-exist. Today the high school district serves all the elementary school districts included in this study. The studied unified district boundary is the same as the present-day high school district boundary.

With 50 school properties in the area, unification would provide school housing flexibility in the establishment of school attendance boundaries and how properties are used. Administrative facilities would also be consolidated, saving costs or opening up space for other uses. If school campuses are no longer optimal to operate (e.g., low attendance or in need of major modernization), there could be options to close campuses temporarily or permanently. But these would be the decisions of the new board and with community input.

The chart on the following page shows the current properties owned by the existing school districts.

CRITERION #7: SCHOOL HOUSING COSTS, CONT'D

Santa Rosa Area: Listing of Facilities Used							
Name of District and Site	Location	Grades Served	Enrollment FY2021-22	Charter School?	District Property?	Number of school campuses	
Santa Rosa City Elem Schools							12
Abraham Lincoln Elem	850 W 9th St, Santa Rosa, CA 95401	K-6	273		yes		
Albert Biella Elem	2140 Jennings Ave, Santa Rosa, CA 95401	K-6	257		yes		
Brook Hill Elem	1850 Vallejo St, Santa Rosa, CA 95404	K-6	329		yes		
Cesar Chavez Language Academy	2480 Sebastopol Rd, Santa Rosa, CA 95407	K-8	927	yes	yes		
Helen Lehman Elem	1700 Jennings Ave, Santa Rosa, CA 95401	K-6	415		yes		
Hidden Valley Elem	3435 Bonita Vista Dr, Santa Rosa, CA 95404	K-6	465		yes		
James Monroe Elem	2567 Marlow Rd, Santa Rosa, CA 95403	K-6	373		yes		
Luther Burbank Elem	203 S A St, Santa Rosa, CA 95401	K-6	294		yes		
Proctor Terrace Elem	1711 Bryden Ln, Santa Rosa, CA 95404	K-6	342		yes		
Santa Rosa Charter School for the Arts	756 Humboldt St, Santa Rosa, CA 95404	K-8	393	yes	yes		
Santa Rosa French American Charter	1350 Sonoma Ave, Santa Rosa, CA 95405	K-6	397	yes	yes		
Steele Lane Elem	301 Steele Ln, Santa Rosa, CA 95403	K-6	370		yes		
Santa Rosa City High Schools							10
Elsie Allen High	599 Bellevue Ave, Santa Rosa, CA 95407	9-12	1,088		yes		
Herbert Slater Middle	3500 Sonoma Ave, Santa Rosa, CA 95405	7-8	701		yes		
Hilliard Comstock Middle	2750 W Steele Ln, Santa Rosa, CA 95403	7-8	418		yes		
Learning House	211 Ridgway Avenue, Santa Rosa, CA 95401	K-3	28	yes	yes, shared site		
Maria Carrillo High	6975 Montecito Blvd, Santa Rosa, CA 95409	9-12	1,545		yes		
Montgomery High	1250 Hahman Dr, Santa Rosa, CA 95405	9-12	1,591		yes		
Piner High	1700 Fulton Rd, Santa Rosa, CA 95403	9-12	1,425		yes		
Ridgway High	325 Ridgway Ave, Santa Rosa, CA 95401	11-12	246		yes, shared site		
Rincon Valley Middle	4650 Badger Rd, Santa Rosa, CA 95409	7-8	802		yes, shared site		
Santa Rosa High	1235 Mendocino Ave, Santa Rosa, CA 95401	9-12	1,814		yes		
Santa Rosa Middle	211 Ridgway Ave., Santa Rosa, California 95401	7-8	494		yes		
Santa Rosa Accelerated Charter	4650 Badger Rd, Santa Rosa, CA 95409	5-6	128	yes	yes, shared site		
Mark West Elem							3
John Riebli Elem Charter	315 Mark West Springs Rd, Santa Rosa, CA 95403	K-6	362	yes	yes		
Mark West Charter	4600 Lavelle Rd, Santa Rosa, CA 95403	K-8	132	yes	yes, shared site		
Mark West Elem	4600 Lavelle Road, Santa Rosa, CA 95403	K-6	385		yes, shared site		
San Miguel Charter	5350 Faught Rd, Santa Rosa, CA 95403	K-6	399	yes	yes		
Pinter-Olivet Elem							4
Jack London Elem	2707 Francisco Ave, Santa Rosa, CA 95403	K-6	260		yes, shared site		
Piner-Olivet Charter	2707 Francisco Ave, Santa Rosa, CA 95403	K-8	198	yes	yes, shared site		
Northwest Prep Charter	2590 Piner Rd, Santa Rosa, CA 95401	K-12	143	yes	yes		
Morrice Schaefer Charter	1370 San Miguel Ave, Santa Rosa, CA 95403	K-6	326	yes	yes		
Olivet Elem Charter	1825 Willowside Rd, Santa Rosa, CA 95401	K-6	295	yes	yes		
Rincon Valley Elem							8
Austin Creek	1480 Snowy Egret Dr, Santa Rosa, CA 95409	K-6	341		yes		
Binkley Elem Charter	4965 Canyon Dr, Santa Rosa, CA 95409	K-6	332	yes	yes		
Madrone Elem	4550 Rinconada Dr, Santa Rosa, CA 95409	K-6	374		yes		
Manzanita Elem Charter	1687 Yulupa Ave, Santa Rosa, CA 95405	K-6	396	yes	yes		
Rincon Valley Partnership Charter	5305 Dupont Dr, Santa Rosa, CA 95409	K-6	98	yes	yes, shared site		
Sequoia Elem	5305 Dupont Dr, Santa Rosa, CA 95409	K-6	401		yes, shared site		
Spring Lake Charter	4675 Mayette Ave, Santa Rosa, CA 95405	K-8	385	yes	yes		
Village Elem Charter	900 Yulupa Ave, Santa Rosa, CA 95405	K-6	349	yes	yes		
Whited Elem Charter	4995 Sonoma Hwy, Santa Rosa, CA 95409	K-6	337	yes	yes		
Kenwood Elem							1
Kenwood Elem	230 Randolph Ave, Kenwood, CA 95452	K-6	115		yes		
Bennett Valley Elem							2
Strawberry Elem	2311 Horseshoe Dr, Santa Rosa, CA 95405	4-6	380		yes		
Yulupa Elem	2250 Mesquite Dr, Santa Rosa, CA 95405	K-3	574		yes		
Bellevue Elem							4
Bellevue Elem	3223 Primrose Ave, Santa Rosa, CA 95407	K-6	386		yes		
Kawana Springs Elem	2121 Moraga Dr, Santa Rosa, CA 95404	K-6	286		yes		
Meadow View Elem	2665 Dutton Meadow, Santa Rosa, CA 95407	K-6	398		yes		
Taylor Mountant Elem	1210 E Bellevue Ave, Santa Rosa, CA 95407	K-6	413		yes		
Roseland Elem							3
Roseland Creek Elem	1683 Burbank Ave, Santa Rosa, CA 95407	K-6	452		yes		
Roseland Elem	950 Sebastopol Road, Santa Rosa, CA 95407	K-6	469		yes		
Sheppard Elem	1777 West Ave, Santa Rosa, CA 95407	K-6	545		yes		
Wright Elem							3
J.X. Wilson Elem	246 Brittain Ln, Santa Rosa, CA 95401	K-6	411		yes		
Robert L. Stevens Elem	2345 Giffen Ave, Santa Rosa, CA 95407	K-6	450		yes		
Wright Charter	4389 Price Ave, Santa Rosa, CA 95407	K-8	409	yes	yes		
Totals			25,916				50

CRITERION #7: SCHOOL HOUSING COSTS, CONT'D

Number of School Campuses

In the *Financial Feasibility Study, October 2022*, the comparative unified school districts to the estimated size of Santa Rosa City Unified have on average 32 school campuses compared to 50 in the study area. The number of properties in the comparison group ranged between 23 – 44. But Santa Rosa City High School District boundaries are 185 land square miles compared to the average comparative unified district of 81 land square miles. The geographical size of the Santa Rosa area might justify a few more campuses. But, the ideal number of campuses depends on the location of the school-age population in relationship to the schools and the accessibility and safety of transportation routes.

Bonded Indebtedness in a School District Reorganization

There are several applicable Education Code Sections related to the treatment of bond funds and the related liabilities after a reorganization, including unification:

EC 35572 (Bonding Capacity Cap in a Reorganization): No territory shall be taken from any school district having any outstanding bonded indebtedness and made a part of another district where the action, if taken, would so reduce the last equalized assessed valuation of a district from which the territory was taken so that the outstanding bonded indebtedness of the district would exceed 5 percent of the assessed valuation (AV) remaining in the district for each level maintained, on the date the reorganization is effective.

Practical Application: This is not applicable as no territory is being taken in a unification. Instead, the Santa Rosa area schools would be merged. The table on page 49 lists out, by each school district, AV, outstanding bonded indebtedness by district, and the percentage of each. Overall, post-unification bonding capacity would be well below the 5% cap at an estimated 1.2%.

EC 15106 (Bonding Capacity of a Unified District): A unified school district may issue bonds that, in aggregation with outstanding bonds issued, shall not exceed 2.5 percent of the taxable property (i.e., AV) of the school district as shown by the last equalized assessment of the county in which the district is located.

Practical Application: Once unified, all outstanding bonded indebtedness of the prior elementary and high school districts would be included in determining that the 2.5% bonding capacity limit is not exceeded. Unification will not create a bonding capacity issue as the bonding capacity remaining would be over twice the current outstanding bonded indebtedness of all districts in the study area.

AV in study area, FY 22-23	\$ 40,691,241,775
Bonding Capacity Limit	2.5%
Maximum Bonded Indebtedness	\$ 1,017,281,044
Bonded Indebtedness, FY 22-23	\$ 481,536,308
Excess Capacity, est.	\$ 535,744,736

CRITERION #7: SCHOOL HOUSING COSTS, CONT'D

EC 35561 (Use of Pre-Existing Bond Funds): Funds from the sale of previously issued school bonds may be used for the acquisition, construction, or improvement of only the school property that was a part of the original district or for such use in that same district. However, if the new or acquiring district accepts and assumes the original district's bonded indebtedness, the funds may be used anywhere in the new or acquiring district and for the same voted purpose. (EC 35561)

Practical Application: The original school districts' unspent bond funds, any authorized but unissued bonds, and repayment of outstanding bonded indebtedness would be unchanged after unification.

For the new unified district to accept and assume the original debt, the unified board would need to call for a district-wide vote for a bond election to subsume the existing debt and the vote must pass by a supermajority. This is unlikely to happen, and the property tax roll assessments would be unaffected by the unification. In other words, no impact on taxpayers due to preexisting bond debt.

EC 35573 (Liability of Outstanding Bonded Indebtedness): In case of a merger, the single resulting school district becomes liable for all outstanding bonded indebtedness of those districts merged.

Practical Application: The unified school district would assume responsibility for all outstanding bonded indebtedness of the former school districts. But the payment derived on the former bond debt would be collected in the same manner and formulas as before unification, again no effect on the taxpayers.

EC 35576 (Computation of Annual Tax Rate): The county board of supervisors shall compute the appropriate annual tax rate for bond interest and redemption. The county board of supervisors shall also compute tax rates for both the annual charge and the use charge for county school service fund programs.

Practical Application: This responsibility exists today. The new district bond tax rates, which include a combination of pre-unified bond debt and any post-unified bond debt, must raise sufficient funds to redeem the outstanding bonded indebtedness.

CRITERION #7: SCHOOL HOUSING COSTS, CONT'D

The following table summarizes the current bonded indebtedness of the districts in the study:

School Districts	Assessed Valuation (AV) Tax Year 2023*	Outstanding School Bonds, June 30, 2023**	Bonded Indebtedness as a Percentage of AV	AV (/100) 23- 24 Tax Rate Per Bond**	School Bond Taxes on \$100,000 AV (2022-23)
Bellevue Elementary School District	\$ 4,065,719,830	\$ 44,152,269	1.086%		
1996 Bond		\$ 920,746		0.0430	\$ 43.00
2008 Bond		\$ 12,248,726		0.0210	\$ 21.00
2008 QSCB Bond		\$ 5,132,797		0.0075	\$ 7.50
2014 Bond		\$ 11,020,000		0.0130	\$ 13.00
2020 Bond		\$ 14,830,000		0.0250	\$ 25.00
Bennett Valley Elementary School District	\$ 2,422,077,597	\$ 12,034,811	0.497%		
2010 Bond		\$ 12,034,811		0.0280	\$ 28.00
Kenwood Elementary School District	\$ 2,035,833,530	\$ 6,000,000	0.295%		
2022 Bond		\$ 6,000,000		0.0275	\$ 27.50
Mark West Elementary School District	\$ 4,608,884,950	\$ 9,884,414	0.214%		
2002 Bond		\$ 3,200,634		0.0270	\$ 27.00
2010 Bond		\$ 6,683,780		0.0110	\$ 11.00
Piner-Olivet Elementary School District	\$ 3,118,534,749	\$ 12,054,157	0.387%		
2010 Bond		\$ 12,054,157		0.0180	\$ 18.00
Rincon Valley Elementary School District	\$ 8,238,909,938	\$ 41,126,389	0.499%		
2004 Bond		\$ 13,926,389		0.0210	\$ 21.00
2014 Bond		\$ 27,200,000		0.0210	\$ 21.00
Roseland Elementary School District	\$ 1,150,517,321	\$ 9,669,673	0.840%		
2012 Bond		\$ 6,799,673		0.0280	\$ 28.00
2020 Bond		\$ 2,870,000		0.0120	\$ 12.00
Santa Rosa City Elementary Schools	\$ 12,381,355,707	\$ 79,322,000	0.641%		
2002 Bond		\$ 6,675,000		0.0080	\$ 8.00
2014 Bond		\$ 40,647,000		0.0170	\$ 17.00
2022 Bond		\$ 32,000,000		0.0270	\$ 27.00
Wright Elementary School District	\$ 2,669,408,153	\$ 14,516,595	0.544%		
1992 Bond		\$ 1,714,198		0.0275	\$ 27.50
2012 Bond		\$ 12,802,397		0.0260	\$ 26.00
Total Santa Rosa Area Elementary School Districts	\$ 40,691,241,775	\$ 228,760,308			
Santa Rosa High School District	\$ 40,691,241,775	\$ 252,776,000	0.621%		
2002 Bond		\$ 22,690,000		0.0100	\$ 10.00
2014 Bond		\$ 130,596,000		0.0180	\$ 18.00
2022 Bond		\$ 99,490,000		0.0280	\$ 28.00
Totals		\$ 481,536,308	1.183%	0.0267	
* Source: County of Sonoma, Property Tax Accounting Division					
** Source Sonoma County Assessor's Office					

School Property

In a unification there would be no transfer of school property and therefore no compensation for the loss of facilities. If an existing elementary school district were to opt out of the unification action, the opt-out district would continue to own its property without impact from the unification.

CRITERION #7: SCHOOL HOUSING COSTS, CONT'D

Developer Fees

Education Code Section 17620 states "... the governing board of any school district is authorized to levy a fee, charge, dedication or other form of requirement against any development project for the construction or reconstruction of school facilities." The fees authorized by Education Code 17620 are currently \$4.79 per square foot of residential construction and \$0.78 per square foot of commercial or industrial construction.

The Santa Rosa school districts receive Level 1 basic fees. All but Kenwood currently collect developer fees. A new developer justification study would need to be conducted upon formation of a new unified district. It is likely that the fees collected would be at the same level per square foot as if not unified. It is reasonable to assume that even with a decline in enrollment, new development will continue, and fees justified based on continual modernization needs plus the expansion of the transitional kindergarten program.

School Capacity

The school districts operate on traditional calendars. Over the past seven years analyzed, there has been a declining enrollment pattern at the elementary level while the high school population has been increasing. And in the most recent year, there was a 1% increase in enrollment between fiscal years 21-22 and 22-23. However, given the Department of Finance's projected decline in enrollment in Sonoma County, school capacity at the elementary levels is not likely an issue.

To further analyze the high school capacity, as of 2022-23 the high schools were (over) under capacity as shown. There are no housing needs overall at the high school level, with modest housing needs at Montgomery and Santa Rosa high schools. But future projected declining enrollment creates considerable excess capacity. Unification would not create additional facility's needs.

SRCS High School Sites	Site Capacity	2022-23 Enrollment	(Over) Under Capacity	Enrollment Projected 2029-30	(Over) Under Capacity
Elsie Allen High	1,695	1,055	640	909	786
Maria Carrillo High	1,863	1,591	272	1,363	500
Montgomery High	1,404	1,572	(168)	1,313	91
Piner High	1,506	1,361	145	1,193	313
Ridgway Continuation	468	233	235	207	261
Santa Rosa High	1,593	1,682	(89)	1,391	202
	8,529	7,494	1,035	6,376	2,153
SRCS Intermediary School Sites	Site Capacity	2022-23 Enrollment	(Over) Under Capacity	Enrollment Projected 2029-30	(Over) Under Capacity
Herbert Slater	897	716	181	612	285
Hilliard Comstock	924	434	490	373	551
Rincon Valley Middle	816	786	30	672	144
Santa Rosa Middle	783	466	317	400	383
	3,420	2,402	1,018	2,057	1,363

**Source: SRCSD Demographic Analysis and Enrollment Projections Study, May 2023*

CRITERION #7: SCHOOL HOUSING COSTS, CONT'D

School Capacity, Cont'd

Unification would not create additional school capacity needs. A new unified school district would need to conduct a facilities study and master plan to best utilize school sites throughout the district given student safety, transportation, and educational program considerations.

A districtwide facilities study would distinguish between permanent and portable buildings, the age of the facilities, whether they have been well or poorly maintained or modernized, whether they have had technological upgrades, and the conditions of the mechanical systems on the school site (e.g., HVAC).

State School Facilities Grants: Several of the school districts are participating in the State School Facilities Program: Piner-Olivet, Roseland, Santa Rosa Elementary and Santa Rosa High. These programs would not be affected by unification. A new unified district would need to determine its eligibility for future funding through the application process.

Conclusion: Any increase in costs to the state as a result of the proposed reorganization would be insignificant and otherwise incidental to the reorganization. The criterion is substantially met.

CRITERION #8: PROPERTY VALUES

Statutory Authority: The proposed reorganization is primarily designed for purposes other than to significantly increase property values.

Regulations: There are no regulations on this subject; however, the rationale given in the petition for the territory transfer should be analyzed. If the petitioners' rationale for the transfer appears questionable or not compelling, the county committee should at least consider whether increased property values might be the primary reason for the petition. The county tax assessor's office or local real estate firms could be consulted for advice on whether territory transfers might have an impact on property values.

Analysis: The rationale behind the study is not related to local development and the impact on property values. The study purpose is to answer the question: Would unification enhance the instructional opportunity for all students at a similar or reduced cost to the affected districts and/or taxpayers?

Conclusion: The proposed reorganization is primarily designed for purposes other than to significantly increase property values. The criterion is substantially met.

CRITERION #9: FISCAL MANAGEMENT OR FISCAL STATUS

Statutory Authority: The proposed reorganization will continue to promote sound fiscal management and not cause a substantial negative effect on the fiscal status of the proposed district or any existing district affected by the proposed reorganization.

Regulations: There are no regulations on this subject; however, the criteria and standards adopted by the State Board of Education pursuant to *EC* Section 33127 (Chapter 1462, Statutes of 1988) and published in *CCR*, Title 5, sections 15440–15466, are recommended for evaluation of the financial condition of school districts affected by any proposed reorganization.

Analysis: The financial criteria was fully evaluated in the *October 2022 Financial Feasibility Study* which is available by contacting SCOE or SRCS. In that study, there were several scenarios to analyze the financial impact of differing ways to reorganize and consolidate the ten Santa Rosa area schools.

This unification feasibility study is based on the first scenario, a full unification of all districts with an option for elementary school districts not interested in unifying to opt out under the Thompsen provisions. However, any opt-out would reduce the opportunity to save administrative costs, one of the main fiscal benefits of consolidation.

The following analysis pulls out data on Scenario One and then builds on the prior study.

Current Fiscal Health of Each District: All of the districts filed positive certifications of fiscal health at 2nd Interim 2022-23. SRCS is self-qualified as Qualified at First Interim, 2023-24, and several other districts in the study area are looking at Qualified status if budget cuts are not made. The entire area is challenged by declining enrollment, which negatively impacts the fiscal status of a school district.

Funding Profile for the Affected Districts: The Financial Feasibility study found that combining districts with disparate revenue profiles means losing funding, and cost savings would be needed to fill the resulting budget gap.

The two funding profiles are:

- **Basic Aid or Community Funded:** Three districts (Piner-Olivet, Rincon Valley, and Mark West) receive basic aid supplemental funding by serving non-resident pupils in local charter schools. One district, Kenwood, is basic aid (community funded) with local taxes exceeding state minimum funding guarantees.
- **High Unduplicated Pupil Count (UPC):** Four districts (SRCESD, Bellevue, Roseland, and Wright) have concentration grant funds for the higher unduplicated pupil counts (either free and reduced meals or English Language Learners).

CRITERION #9: FISCAL MANAGEMENT OR FISCAL STATUS, CONT'D

The table below shows the funding profiles by district and the additional funds from basic aid, basic aid supplement and concentration grant funding. All would be lost upon unification due to lack of eligibility.

	LCFF ADA 20-21	Basic Aid*		Basic Aid Supplement		Concentration Grant Funds
		Basic Aid?	2021-22 P2	Eligible?	2021-22 P2	2021-22 P2
Bellevue Elementary School District	1,532.57	no				\$ 2,989,285
Bennett Valley Elementary School District	969.72	no				
Kenwood Elementary School District	55.67	yes	\$ 1,802,840			
Mark West Elementary School District	422.93	no			\$ 2,706,065	
Piner-Olivet Elementary School District	273.93	no		yes	2,891,660	
Rincon Valley Elementary School District	1293.7	no		yes	4,052,731	
Roseland Elementary School District	1370.05	no				2,980,621
Santa Rosa City Elementary Schools	3396.48	no				2,753,741
Santa Rosa High School District	10076.31	no				
Wright Elementary School District	965.95					1,179,852
totals	<u>20,357.31</u>		<u>\$ 1,802,840</u>		<u>\$ 9,650,456</u>	<u>\$ 9,903,499</u>

**Total local revenue less state aid guarantee plus categorical state minimum guarantee to basic aid districts.*

A recap of the LCFF funding loss from the Financial Feasibility Study is shown below. The revenue loss is estimated at \$21.3M.

	Before Unification	After Unification
Scenario 1 - All District Unification		
Enrollment with local charters	25,608	25,608
Total LCFF Funding State Aid/Taxes	\$ 223,312,939	\$ 211,660,209
Basic Aid Supplement	9,650,456	-
	<u>\$ 232,989,003</u>	<u>\$ 211,685,817</u>
<i>LCFF Revenue Change</i>		<u>\$ (21,303,186)</u>
Analysis of the Revenue Loss:		
Concentration Grant	\$ (9,903,499)	
Supplemental Grant	109,639	
Basic Aid (Kenwood)	(1,700,976)	
Basic Aid Supplement	(9,650,456)	
Additional Minimum State Aid	(136,409)	
Other - Minor	(21,485)	
Total Loss	<u>\$ (21,303,186)</u>	
% of Prior LCFF Funding	<u>-9.14%</u>	
UPC % After Unification	<u>54.84%</u>	
	Before Unification	After Unification
Scenario 1 - SRCESD and SRCHSD Unify		
Enrollment with local charters	15,240	15,240
Total LCFF Funding State Aid/Taxes	\$ 143,666,481	\$ 140,949,852
	<u>\$ 143,681,721</u>	<u>\$ 140,965,092</u>
<i>LCFF Revenue Change</i>		<u>\$ (2,716,629)</u>
Analysis of the Revenue Loss:		
Concentration Grant	\$ (2,753,741)	
Supplemental Grant	37,112	
Total Loss	<u>\$ (2,716,629)</u>	
% of Prior LCFF Funding	<u>-1.89%</u>	
UPC % After Unification	<u>50.31%</u>	

CRITERION #9: FISCAL MANAGEMENT OR FISCAL STATUS, CONT'D

Cost Savings: Looking at the cost of activities (the function code) it is feasible that economies of scale will yield cost savings in the consolidation of administrative services, efficiencies in program delivery and through possible reduction in the number of school facilities.

Comparing an SRCUSD (all districts combined) to seven unified school districts of comparable size and UPC shows about \$44.8M more spent by the combined Santa Rosa districts than the average of the comparative districts. In comparing selected functions, considerable savings might be realized through unification in instruction, instructional services, pupil services, and community services. Less was spent in plant services by SRCUSD.

District Name	Expenditures By Function Code (Activity)								
	Gen Fund Exp by Activity - 1000-1999 Instruction Per Student # (District)	Gen Fund Exp by Activity - 2000-2999 Instruc-related Svcs Per Student # (District)	Gen Fund Exp by Activity - 3000-3999 Pupil Services Per Student # (District)	Gen Fund Exp by Activity - 4000-4999 Ancillary Services Per Student # (District)	Gen Fund Exp by Activity - 5000-5999 Community Services Per Student # (District)	Gen Fund Exp by Activity - 6000-6999 Enterprise Per Student # (District)	Gen Fund Exp by Activity - 7000-7999 General Administration Per Student # (District)	Gen Fund Exp by Activity - 8000-8999 Plant Services Per Student # (District)	Gen Fund Exp by Activity - 8000-8999 Plant Services Per Student # (District)
<i>Santa Rosa Schools - All Unified</i>	\$ 8,675	\$ 1,687	\$ 1,441	\$ 66	\$ 88	\$ -	\$ 1,075	\$ 1,077	
Chino Valley Unified (San Bernardino)	\$ 7,390	\$ 1,399	\$ 1,012	\$ 110	\$ 32	\$ 45	\$ 496	\$ 1,248	
Glendale Unified (Los Angeles)	\$ 9,151	\$ 2,015	\$ 698	\$ 66	\$ 16	\$ -	\$ 756	\$ 1,297	
Orange Unified (Orange)	\$ 7,807	\$ 2,252	\$ 1,378	\$ 83	\$ 6	\$ -	\$ 564	\$ 1,339	
Placentia-Yorba Linda Unified (Orange)	\$ 7,915	\$ 1,439	\$ 945	\$ 3	\$ -	\$ 56	\$ 595	\$ 1,290	
Saddleback Valley Unified (Orange)	\$ 8,230	\$ 1,311	\$ 876	\$ 84	\$ 18	\$ -	\$ 611	\$ 999	
Torrance Unified (Los Angeles)	\$ 7,353	\$ 1,191	\$ 969	\$ 109	\$ -	\$ -	\$ 598	\$ 932	
Tustin Unified (Orange)	\$ 7,930	\$ 1,183	\$ 1,085	\$ 44	\$ 8	\$ -	\$ 569	\$ 1,033	
Average of Comparative Districts	\$ 7,968	\$ 1,541	\$ 995	\$ 71	\$ 11	\$ 14	\$ 598	\$ 1,163	
Dollar Difference from Average Per Pupil	\$ 707	\$ 146	\$ 446	\$ (5)	\$ 77	\$ (14)	\$ 477	\$ (86)	
Total Dollar Difference from Comparative Districts	\$ 18,140,206	\$ 3,735,072	\$ 11,450,799	\$ (135,621)	\$ 1,964,670	\$ (370,208)	\$ 12,227,870	\$ (2,195,592)	
							Total	\$ 44,817,195	

CRITERION #9: FISCAL MANAGEMENT OR FISCAL STATUS, CONT'D

Certificated Staffing Analysis

A new salary schedule and benefit package would be negotiated by the new unified district. CW analyzed certificated staffing Full-time Equivalent (FTE) employee counts and the average salaries using the State's J-90 reporting data for the fiscal year 2020-21. The average teacher salary for the Santa Rosa area districts and FTEs were:

School District	Average Salary	Salary Schedule FTE
Bellevue Elementary School District	\$ 83,482	68
Bennett Valley Elementary School District	\$ 72,457	54
Kenwood Elementary School District	\$ 83,881	15
Mark West Elementary School District	\$ 85,560	75
Piner-Olivet Elementary School District	\$ 85,824	48
Rincon Valley Elementary School District	\$ 77,046	198
Roseland Elementary School District	\$ 74,841	145
Santa Rosa City Schools	\$ 81,181	786
Wright Elementary School District	\$ 73,440	65
Average Salary and Total FTE	\$ 79,746	1,454

source: 2020-21 J-90 report, except Kenwood and Wright, 2019-02

There is more certificated FTE in the Santa Rosa area compared to districts of a similar size and demographic. Santa Rosa Schools certificated FTEs are 343 more than the average of the comparative districts. The calculated Enrollment per FTE is 18 compared to 22. (Note: the Enrollment per FTE doesn't necessarily reflect actual class sizes, which are subject to variables such as grade level and program placement.)

District Name	Census Day Enrollment (District)	Teacher Salary-Avg (District)	Salary Schedule FTEs	Enrollment per FTE
<i>Santa Rosa Schools - All Unified</i>	25,658	\$ 79,746	1,454	18
Chino Valley Unified (San Bernardino)	27,333	\$ 88,458	1,261	22
Glendale Unified (Los Angeles)	24,924	\$ 86,125	1,143	22
Orange Unified (Orange)	26,943	\$ 89,626	1,168	23
Placentia-Yorba Linda Unified (Orange)	24,296	\$ 91,200	1,122	22
Saddleback Valley Unified (Orange)	24,954	\$ 91,978	1,126	22
Torrance Unified (Los Angeles)	22,490	\$ 84,234	1,008	22
Tustin Unified (Orange)	22,761	\$ 91,764	946	24
<i>Average of Comparative Districts</i>	24,814	\$ 89,055	1,111	22
<i>FTE Difference</i>			343	

CRITERION #9: FISCAL MANAGEMENT OR FISCAL STATUS, CONT'D

Administrator, Pupil Services, and Classified Staffing Analysis

CW compared FTEs for non-teaching staff using the most recently published data, the fiscal year 2018-19. The data includes all charters (local and independent). Therefore, in most cases, different comparative groups of districts were used to best align with the total enrollment and comparable staffing needs. The results for each scenario are shown below and on the following pages:

Santa Rosa area-wide schools had 46 more administrators, 86 more pupil services FTEs and 41 more classified staffing FTEs for 174 FTEs than comparative districts. However, a wide staffing level range was noted within similar-sized districts.

	2018-19 Enrollment	Administrators		Pupil Services		Classified Staff				
		FTE	Per Pupil	FTE	Per Pupil	Office/Clerical	Other Classified	Para- professional	Total	Per Pupil
<i>Santa Rosa Schools - All Unified</i>	29,232	141	207	211	139	341	409	338	1,088	27
Chino Valley Unified (San Bernardino)	28,063	99	289	83	351	296	401	179	876	32
Desert Sands Unified (Riverside)	28,610	86	335	115	250	230	562	239	1,031	28
Temecula Valley (Riverside)	29,609	85	353	212	156	202	424	315	941	31
Visalia Unified (Tulare)	29,107	128	305	115	324	231	593	418	1,242	23
Orange Unified (Orange)	27,473	75	373	98	300	232	664	247	1,143	24
<i>Average of Comparative Districts</i>	28,572	95	331	125	276	238	529	280	1,047	27
<i>FTE Difference Over (Under)</i>		46		86		103	(120)	58	41	
<i>* Include all charter schools</i>							Total - All Groups		174	

LONG-TERM DEBT ANALYSIS

CW also considered long-term liabilities in the Financial Feasibility analysis, as summarized below:

Schedule of Long-Term Liabilities							
	CalSTRS/CalPERS Pension Liability	General Obligation Bonds	Compensated Absences	Other Post- Employment Benefits (OPEB)	Early Retirement Incentives	Other Loans and Certificates of Participation	Total Long- Term Debt
Santa Rosa Area Districts							
Santa Rosa City Schools	\$ 195,425,275	\$ 246,922,800	\$ 1,954,462	\$ 24,752,522	\$ -	\$ 17,649,755	\$ 486,704,814
Mark West Elementary School District	16,941,857	18,231,050	71,109	2,393,918	109,000	-	37,746,934
Piner-Olivet Elementary School District	16,078,696	18,918,481	158,336	1,353,874	-	-	36,509,387
Rincon Valley Elementary School District	50,188,721	51,982,373	185,509	3,201,330	-	1,813,192	107,371,125
Kenwood Elementary School District	3,070,766	-	22,281	-	-	-	3,093,047
Bennett Valley Elementary School District	11,471,595	13,094,851	79,872	-	-	-	24,646,318
Bellevue Elementary School District	19,072,298	49,070,513	120,534	-	-	-	68,263,345
Roseland Elementary School District	32,250,874	10,950,807	89,006	3,004,550	-	2,655,000	48,950,237
Wright Elementary School District	18,348,254	19,206,032	104,177	-	-	-	37,658,463
							-
Total Santa Rosa Districts	\$ 362,848,336	\$ 428,376,907	\$ 2,785,286	\$ 34,706,194	\$ 109,000	\$ 22,117,947	\$ 850,943,670

Source: June 30, 2021 audited financial statements

Looking closer at the components of long-term liabilities:

- CalSTRS/CalPERS:** this liability is a proportionate share of the entire statewide liability for each pension system. The liability cannot be negotiated away nor funded locally except through statutorily determined employer contribution rates.
- General Obligations Bonds:** bonds are secured by voter-approved taxes. After reorganization, the bonded indebtedness is redistributed to all property owners in the newly reorganized District(s), typically based on proportionate assessed valuation. Still, a negotiation consideration could be made for where the properties that benefited from the improvements are located. The process could result in more or fewer taxes for individual taxpayers. Still, given that the high school district debt is already apportioned area-wide, it is unlikely to result in material changes. Of the \$247M in general obligation debt in Santa Rosa City Schools, the elementary district's share is about \$50M.
- Compensated Absences:** vacation benefits are negotiated. A new contract would be negotiated for future benefits in a newly unified school district. Past accrued benefits would remain a liability to the newly unified school district.

LONG-TERM DEBT ANALYSIS, CONT'D

- **Other Loans and COPS:** Several districts have non-voter debt that would likely be allocated as follows in a reorganization:
 - Santa Rosa High has \$12M in COPS to improve facilities throughout the high school district. In Scenario 1, the reorganized district would assume the debt. In Scenario, the debt would be allocated proportionately to each district by either ADA or school site location in the reorganized districts. In Scenario 3, the debt would remain within Santa Rosa City High School District with no allocation to the merged elementary districts.
 - There is a \$6M Charter School Facilities Program loan for the Santa Rosa Charter for the Arts, a local charter authorized by SRCESD. The loan obligation would remain with the charter school in a reorganization.
 - The PG&E energy retrofit loan of \$4.7M would be divided by proportionate ADA for all scenarios, including SRC schools. The only exception would be Scenario 3 which does not include a portion of either SRCESD or SRCHSD.
 - Roseland ESD has a \$2.7M lease refinancing that is non-voter debt. The debt would follow into any scenarios, including Roseland. It is be repaid through 2036.
 - Rincon Valley has a \$1.8M lease-purchase agreement for work performed at the Spring Creek Elementary School site. The debt would follow Rincon Valley in any reorganization scenario that involves the district.
- **Other Post-Employment Benefits:** Five of the nine school districts have OPEB. The exceptions are Kenwood, Bennett Valley, Bellevue, and Wright. Except for SRC Schools, all districts cap at age 65. Consider:
 - SRC has the largest liability at \$25M and without a cap it could grow. But compared to similar size districts it may not be nearly as large. For example, Glendale Unified has a \$129M liability and Saddleback Unified a \$333M liability.
 - Total benefit payments made in 2020-21 amounted to \$1.7M, with \$1.5M paid by SRC.
 - In the division of assets and debt, should a reorganization occur, there would a negotiation on the buyout of the future obligations, often shared by proportionate FTE.
 - New contracts for any reorganized district would be negotiated on benefits, but past guaranteed benefits of the former districts would likely be assumed by the new District. In Scenario 2, which divides SRCHSD, the distribution formula would be negotiated and likely be based on proportionate high school ADA or FTEs.
- **Early Retirement Incentive and Other Liabilities:** These liabilities would become liabilities of the newly unified school district. The amounts paid from general operating funds are insignificant compared to the new budget's size.

Conclusion: The proposed reorganization could continue to promote sound fiscal management and not cause a substantial negative effect on the fiscal status of the proposed district, or any existing district affected by the proposed reorganization, but only if a reasonable financial plan can be put into place to avoid a fiscal cliff Year One of unification. Alternatively state revenues might be found to offset the loss, e.g., through special legislation.

The new district cannot be fiscally solvent by simply merging all current operations into one unified district. There would be an approximate \$21M funding gap. Administration would need to be drastically reduced, redundant operational and instructional services eliminated and probably closing underutilized school facilities. Therefore, the criterion is met only if there is a solid and reasonable financial plan that can be executed in a timely manner leading up to unification.

