

Educational Strategic Planning LLC

Study Agreement

August 14, 2024



Santa Rosa City Schools

Special Education Review

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I. INTRODUCTION

The following study agreement is based on conversation held between Mr. John Fischer, Executive Director Special Services for Santa Rosa City Schools (SRCS) and myself on August 9, 2024.

With the hiring of the Executive Director of Special Services and the appointment of the newly selected District Superintendent, this is an opportune time to conduct a review of the special education delivery system.

1. The study will evaluate the effectiveness and efficiency of the special education delivery system
2. Provide recommendations that will assist the administration, staff, board and parents through a spirit of trust, respect and collaboration in development of a strategic (action) plan that will improve the efficiency and effectiveness of the special education delivery system.
3. Provide the basis of development of a district- wide coherent and cohesive special education delivery system that will reflect systems, procedures and policies that ensures educational opportunities for All students.

The district takes great pride in providing beneficial services to All students. This study is evidence of the districts ongoing commitment to continue to improve, look for ways to assure efficient and effective services are continued to be provided to All students.

II. BASIS OF AGREEMENT

Santa Rosa City Schools, hereinafter will be referred to as the District and Educational Strategic Planning (ESP) LLC, will be referred as ESP hereinafter. The District has requested ESP to review the status of the districts special education delivery system.

Work will consist of conducting an analysis of the districts special education procedures, systems, policies and make recommendations based on findings from analyzing the study objectives listed below. All work will be performed in accordance with the terms and conditions of this agreement.

The District and ESP mutually agree to the following:

III. SCOPE OF WORK

The scope and objectives of this study are to:

1. Determine whether the district is over identifying students for special education services compared to statewide average, and make recommendations that will reduce over identification, if needed.
2. Analyze special education teacher staffing ratios, class and caseload size using the statutory requirements for mandated services and statewide guidelines.
3. Review the efficiency of staffing allocation of special education paraeducators throughout the school district. Review the procedures for identifying the need for the process for placement and cost efficiencies.
4. Determine the district's general education fund contribution to special education and make recommendations for greater efficiency.
5. Review to cost of special education transportation and the process of determining eligibility for students to receive specialized transportation.
6. Review the cost and placement process for students receiving extended school year services.
7. Provide an analysis of all staffing and caseloads for related service providers: speech therapists, psychologists, occupational/physical therapists, behavior specialists, adaptive physical education teachers, credentialed nurses and others. Review how these services are related to contracted services.
8. Determine, if the district needs to develop a district wide stakeholder's taskforce to study, implement, and monitor the special education system. Assist the district in the development such taskforce committee, if necessary.
9. If requested, assist the district in developing an action plan to implement special educations findings and recommendations that would be monitored by the districtwide taskforce committee.
10. Review the districts procedural manual, and determine whether the district has systems, procedures, and policies in place that provides for a coherent and cohesive district wide special education delivery system that provides services to All students.

IV. PROJECT COSTS/PAYMENT SCHEDULE

A contract (this study agreement) between the District and ESP will include the following:

1. A one-time billing not to exceed \$29,500 at completion of the study.

2. **There will be no billing for travel, lodging, or meals.**
3. The district will select a contact person to assist ESP in formatting, editing, copying and typing the draft and final report at no cost to ESP. Basically proof reading the draft and final product.
4. Dr. Gillaspie will submit one invoice for billing purposes.
5. The billing will include a full written report approved by the District Superintendent.
6. The final invoice will cover these services rendered.

V. SERVICES, PRODUCT, TIMELINE TO BE PROVIDED

1. Orientation Meeting

During the first day of field work, Dr. Gillaspie will conduct an orientation sessions with the District Superintendent. The district superintendent may add additional staff to the orientation meeting. Usually the superintendent has their executive cabinet members in attendance.

The purpose of the orientation meeting will be the following:

Brief staff on procedures of the study

Review study objectives

Review the interview schedule

Discuss data collection

Discuss schedules to be on-site and who will be selected to interview

At the sole discretion of the district superintendent he will select who will participate in the meeting.

2. On-site Review

Dr. Gillaspie will conduct on-site interviews at the district office as outlined in the scope of study. The district will provide office space for meetings, interviews, reviewing data, and report writing.

A complete Documentation/Interview list Request will be provided to the District 3 weeks prior to field work. The Districts contact person for ESP will assist in development of the interview schedules and obtaining necessary documents.

3. Progress and/or Exit Report (Exit Meeting)

Dr. Gillaspie will hold an exit meeting at the conclusion of the on-site review to inform the district superintendent and his representatives of preliminary findings and recommendations to that point.

Dr. Gillaspie will be available to meet at the request of the district superintendent through the study process, to debrief, clarify objectives, and/or to make necessary changes on direction of the study.

4. Draft Report

A copy of a preliminary draft report will be delivered to the district superintendent for his review and comment for accuracy of findings within 30 days of completion of field work.

5. Final Report

A copy of the final report will be delivered to the District Superintendent 10 days following completion of the district superintendent's final review of the draft report for accuracy.

This timeline will be dependent on the districts staff who will be designated to assist in the finalizing format and edit of report at the discretion of ESP.

VI. RESPONSIBILITIES OF THE DISTRICT

1. The District Superintendent agrees to provide a conference room space during on-site interviews, data collection and secretary support in editing and formatting the report.
2. District Superintendents will provide a contact person to assist in arranging interview schedules, arranging staff to be interviewed, and providing copies of requested documents.
3. The district will select a staff member who will assist in formatting, and editing the report.
4. Dr. Gillaspie will work cooperatively with a contact person at the district to make arrangements for meetings, reviewing and analyzing data, and report writing.

VII. PROJECT SCHEDULE

The following schedule outlines the planned completion and dates for different phases of the Study:

Tentative Schedule: (Depending on approval of the District)

1. TBD

Preliminary meeting with District Superintendent to explore feasibility study

2. **District will select week for on-site review**

Orientation

Monday 9:00 am Orientation

With superintendents and designated staff on site to begin study

3. **Staff Interviews**

Monday – Friday

Initiate staff interviews, collection of data on site field work

4. **Exit Meeting**

Friday

Exit meeting with district superintendent and designated executive staff regarding preliminary findings

5. **Draft Report Submitted**

Preliminary draft report submitted to district superintendents for review within 30 days of completion of field work

6. **Final Report Submitted**

Final report submitted to district superintendent at the completion of the district approving draft report (depending on time district responds to draft report)

7. **Board Presentation**

To be determined, if requested

VIII. COMMENCEMENT, AND COMPLETION OF WORK

Dr. Gillaspie will begin work as soon as study agreement is approved and the agreed upon dates of on-site field work. Dr. Gillaspie will work expeditiously to complete its work and deliver its report, subject to the cooperation of the district and from parties from who, in his judgment, he must obtain information. Once ESP had completed its field work, reviewed and analyzed data, it will proceed to prepare a preliminary draft and final report.

Educational Strategic Planning LLC is an independent contractor and is not an employed or engaged in any manner with the district. Educational Strategic Planning LLC representatives are not authorized to speak for, represent, or obligate the district in any manner without prior express written authorization from an officer of the district.

IX. INSURANCE

During the term of this agreement, Educational Strategic Planning, LLC shall maintain liability insurance in an amount not less than \$1 million dollars, unless otherwise agreed upon in writing by the district. Automobile liability insurance in the amount required under California state law will be on file with ESP. ESP will provide the districts with copies of certificates of insurance, as requested.

X. MANAGEMENT ASSISTANCE

These services provided by ESP are considered as Management Assistance to the participating District. The findings and recommendations have no binding authority for the board of trustees and/or administration to implement. The findings are based on best industry standards, education codes, data review provided by the SELPA and school district and interviews of school district personnel.

The report findings and recommendations are for the District to consider in making a cost effective and improved educational delivery system to their students.

BACKGROUND

XI. Dr. Gillaspie and Educational Strategic Planning LLC

Experienced Chief Executive Officer with a demonstrated history of working in the management industry. Special Education Instructional Design, Organizational and Leadership, Administrative mentoring and coaching, fiscal and community board governance. Strong business development professional with a Doctorate of Education focused in Education and Leadership from University of San Francisco.

With over 35 years of experience in public education, Dr. Gillaspie has vast experience in educational leadership in California as a county superintendent, assistant superintendent educational services, director of special education, teacher and school psychologist. Worked as **Deputy Administrative Officer for Fiscal Crisis & Management Assistance Team (FCMAT) from 2002-2016.**

Dr. Gillaspie has conducted more than 150 educational studies throughout California schools including; but not limited to the following: county offices of education, school districts K-8 and K-12 unified, charter schools and SELPAs.

The following are **additional highlights** of Dr. Gillaspie's experience:

- * Vast experience in teaching at all college levels, community college, state universities, universities, as well as a key note speaker nationally.
- * Served for three years as Adjunct Field Supervisor at the California State University (CSU), Sacramento, College of Education, Department of

Educational Leadership and Policy Studies. Provided supervision of internships of school principals throughout Northern California.

- Adjunct Director of Pupil Personnel Services for Fresno Pacific University, Associate Professor from 2002-2015.
- Started company Educational Strategic Planning LLC 2016. Serving all school districts, county offices of education and SELPA's throughout California. Providing administrative mentoring/coaching and conducting management assistance studies.
- Served as Fiscal Advisor for Santa Clara County Office of Education, for fiscal and school community governance support to Alum Rock Union Elementary School District, during 2018.
- Board Member for School Innovations and Achievement (SI &A) Attendance Institute, 2019.

XII. CREDENTIALS

- Life time valid Pupil Personnel Services with emphasis in counseling and school psychology
- Life time valid California Standard Secondary Teaching Credential in Psychology
- Life time valid California Administrative Credential
- Life time valid credentials in California Community Colleges with emphasis in teaching psychology and physical education.
- Doctor of Education, School of Education, University of San Francisco

XIII. Dr. GILLASPIE'S CONTACT INFORMATION

Title: Executive Officer of Educational Strategic Planning LLC

Mailing address: 109 Edinburgh Court, Roseville Ca 95661

Cell Phone: 661-204-0579

Email Address williamp.gillaspie@gmail.com

XIV. APPROVAL SIGNATURES

William Gillaspie Ed.D.

Date

Educational Strategic Planning LLC

Signatures

Dr. Daisy Morales, Superintendent

Date

Santa Rosa City Schools Superintendent

CONTACT PERSON

Name: JOHN FISCHER

Title: EXECUTIVE DIRECTOR, SPECIAL SERVCIES

Address: Santa Rosa CITY SCHOOLS
110 Stony Point Rd Suite 210
SANTA ROSA, CA 95401

Email: jfischer@srcs.k12.ca.us

Phone: 707-890-3800 x 80810

