Success for Small Adult Schools
A “How to” Guide for Administrators

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Foreword

This manual has been designed as a resource for new and experienced administrators of small adult schools. It identifies some of the major challenges facing those administrators and outlines some suggested solutions.

Many administrators of small adult schools work in isolation because their schools are located in remote rural areas. They often do not have the funds or time to attend professional development workshops or conferences that can provide helpful information, ideas, and resources. This guide provides some of the information and support that administrators need to manage a program that most likely is different from other programs they oversee or have overseen in the past. Serving as administrator of a small adult school can be challenging but, at the same time, can be infinitely rewarding.

Education Code numbers are cited throughout this guide in parentheses (EC00000.0). Administrators are encouraged to consult the referenced codes, if they have questions.
Background

Adult Education programs were established in California in 1856 to provide services to recent immigrants. For more than 120 years, these programs grew significantly. In 1978, Proposition 13 established caps on the Average Daily Attendance (ADA) that adult schools can claim, and it defined ten authorized areas in which adult schools can claim ADA apportionment. Since then, adult schools caps have increased by a legislated 2.5% in years when funds were available to support that growth. In 1992, seeking to establish new schools in underserved areas, the California Department of Education, in partnership with adult education advocacy groups, recommended legislative changes that resulted in development of “start-up” adult schools throughout the state. These new schools initially were given 15 units of ADA to begin their programs. According to the 2002-2003 data from the California Department of Education, there are currently 377 adult schools in California, 195 with caps of 100 units of ADA or less.
Staffing the Small Adult School

Staffing remains one of the greatest challenges in running a small adult school. This task need not be daunting if administrators keep in mind the differences between the K-12 and adult school criteria for staffing.

Administration

Small adult schools are not required to have a full-time administrator, and most small school administrators are responsible for several different programs within their districts. Education Code Section 44860 states that schools fewer than six certified employees may be managed by an individual who does not hold an administrative credential, for example, a teacher or other staff member who is working towards an administrative credential. Schools with an average daily attendance, or ADA, of 100 to 199 require a half-time administrator, and schools with an ADA of 200 or more require a full-time administrator or equivalent.

Qualification of Teachers

Teacher credentialing requirements are the same for all Adult Education classes. Education Code numbers are cited in parentheses. For more information about teacher credentialing, visit the Web site for the California Commission on Teacher Credentialing (CTC).

(https://www.ctc.ca.gov)

*ADA-based programs:* All teachers for ADA-based classes must be credentialed. Those who teach in the diploma programs or who teach specific electives must hold a multiple- or single-subject credential indicating they are qualified to teach preschool through adult students (*EC 44865*). However, a teacher may also qualify for an Adult Designated Subjects Credential if he/she holds a Bachelor’s degree or higher, has passed the CBEST, and has 20 semester units or 10 upper division units in the subject to be taught.

*Vocational programs:* Teachers for vocational programs must have a high school diploma, five years’ experience in the courses they are teaching, and a letter of support from a current or former supervisor verifying this experience. They also must be enrolled in personalized in-service training as approved by the California Commission on Teacher Credentialing to qualify for a Vocational Designated Subjects Teaching Credential (*EC 44260*, et seq).

*Fee-based programs:* Teachers do not need to be credentialed and do not need to file with the county to teach a class. Check with your personnel department for placing these teachers on the payroll (*EC 52506*).

Teacher Recruitment

Most small adult school programs offer evening classes and hire part-time teachers to staff them. Recruiting teachers can be a challenge, and teacher turnover rate can be high because of the part-time nature of the job. Perhaps the best method of teacher recruitment is to tap teachers currently employed by the district. Some ways to attract qualified teaching staff include:
• **Distributing recruitment flyers** to district personnel. Teachers often are interested in working for hourly pay in adult education. Some of those staff members may also be interested in teaching fee-based classes. Advantages to hiring teachers already employed by the district are (1) they are cleared to teach in the district; (2) their adult education teaching schedules usually do not conflict with day assignments; and (3) they are familiar with community interests.

• **Post newspaper ads and announcements** to professional association newsletters and websites.

• **Distribute information** about employment opportunities to local community college(s) where many people are part-time employees.

• **Contact** the Retired Teachers Association and the California State Employees Association in the region.

• **Send a flyer** to local businesses, churches, Chamber of Commerce, and community agencies. This is especially useful in identifying vocational and fee-based course ideas and/or teachers.

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**Clerical and Custodial Staff**

Most small schools use classrooms in local elementary or high schools. The district typically provides custodial, personnel, business, and other services based on the amount and type of direct and/or indirect funding available to the district through adult education (EC 52616.4). It is critical for adult school administrators to have at least part-time clerical assistance.

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**Differences Between Adult Education and K-12 Education**

One role of Adult Education is to help students who withdrew from school in the past to “drop back in” and to succeed in accomplishing their learning goals. Many lead lives that may prevent them from attending school regularly. It is important to reassure these students that Adult Education is designed to help them achieve their academic and vocational goals.

Teaching and working with adults is different from teaching children. New teachers and administrators, particularly those who have spent years in a K-12 environment, may not readily recognize or appreciate these differences. For example, adult learners are *volunteer* learners who attend adult education because they *want* to, often to meet specific life goals. If they do not believe that their adult education classes are helping them meet these goals, they may “vote with their feet,” i.e., stop attending. Children often defer applying to real life the concepts and skills learned in school, but adult learners often apply immediately that which they have learned in class. For this reason, it is important that instruction for adults have applicability to everyday life. Also, by virtue of having lived longer than children and therefore having many more life experiences than children, adult learners are a rich reservoir for the learning environment. Malcolm Knowles (1970) described these characteristics of adult learners in *The Modern Practice of Adult Education*.

To enrich instruction and make it meaningful to adult learners, teachers and administrators need to build instruction around the life, family, and work experiences of adult learners. Adult education teachers and administrators will benefit from professional development that addresses adult learning theory and teaching methodologies that are successful with adult learners.
Staff development opportunities abound at no or minimal cost, through state leadership projects (CALPRO, OTAN, CASAS, CDLP) and through networking. Asking an administrator or teacher from an established adult school to facilitate discussions or provide workshops for your staff is one way to provide professional development.

All staff should be trained in how to implement adult education accountability requirements. It is essential that staff understand how to interpret assessment scores and test results, including TOPSpro-generated reports, and be able to incorporate the data into learner-centered lessons—a pivotal role of adult education programs. Teachers need to learn to manage multi-level English as a Second Language (ESL) and Adult Basic Education (ABE) classes, to integrate technology into instruction, to help students set realistic goals, and to design lesson plans to meet those goals. The following resources are some ways to support professional development activities on a limited budget:

- CALPRO offers workshops, networking meetings, and other activities through its Professional Development Centers (PDCs). Visit http://www.calpro-online.org and click on “calendar” to see the workshops that are offered statewide, or click on your local PDC calendar to see the workshops offered in your region. In addition, the CALPRO Web site offers numerous publications related to professional development.
- CASAS continually develops new methods for evaluating and using data related to adult learning in the classroom and the workplace and offers workshops and materials on a regional basis throughout the year. Topics include CASAS implementation, California accountability, and TOPSpro. Register online for regional workshops at http://www.casas.org. CASAS also hosts an annual National Summer Institute, which provides an opportunity to network and collaborate with other national, state, and local adult education providers. The Institute hosts meetings and workshops that address innovations, trends, and policies related to youth and adult learner assessment, curriculum, data management, and program evaluation. Visit http://www.casas.org for more details.
- Collaborate with distance learning programs and educators about online testing, distance learning knowledge base, and new instructional delivery methods. Visit http://www.cdlponline.org for more details.
- Discuss having district trainers work with the staff on specific needs.
- Use supplemental grant dollars to send staff to appropriate local, regional, and state workshops and conferences.
- Collaborate with other adult schools, community based organizations, or community colleges in the area to provide joint professional growth opportunities.
- Set up mentoring between experienced and new staff members. Contact CALPRO for information about its mentor training program.

**Retaining Staff**

The administrator of the small adult school should ensure that teachers

- Have the flexibility to work during hours that fit family schedules;
- Receive the material, technical, and emotional support they need to be successful with their assignments;
- Have a pay schedule that is competitive with other local adult schools or community-based organizations;
• Are empowered to make suggestions for enhancing the quality of instructional programs and working with colleagues to build viable school programs; and
• Are part of a site-based team.

**Adult Education Courses**

The success of every adult education program, regardless of size, is tied to the relevance of its courses to the surrounding community. Relevance can be determined by:

- Conducting a community survey;
- Reviewing the economic and demographic profiles of the community. (Refer to the State of California Employment Development Department, http://www.labormarketinfo.edd.ca.gov);
- Contacting the library reference department for census data (available online at http://www.census.gov);
- Meeting with community agencies such as the Chamber of Commerce, social services, one-stop centers, Employment Development Department (EDD), city administrators, realtor groups, etc.;
- Discussing needs with local businesses and professional groups;
- Talking with other district administrators and central office staff, especially community liaison personnel;
- Surveying current adult education students as well as parents of district K-12 students; and
- Tallying telephone and front office inquiries.

**Course Approval**

All courses earning apportionment credit must have prior approval from CDE. If courses are added at any time during the year, all courses must be resubmitted to CDE for approval.

Classes must be held at sites within the boundaries of the school district.

**Categories of Authorized Courses**

The following classes and courses are authorized to be offered by school districts and county superintendents of schools for apportionment purposes from the adult education fund (EC 41976):

1. Adult programs in **parenting**
2. Adult programs in elementary and secondary **basic skills** and other courses and classes required for the **high school diploma**
3. Adult education programs in **English as a second language** (ESL)
4. Adult education programs in **citizenship** and workforce preparation for immigrants
5. Adult education programs for **substantially handicapped persons**
6. Adult short-term **vocational programs** with high employment potential
7. Adult programs for **older adults**
8. Adult education programs for **apprentices**
9. Adult programs in **home economics**
10. Adult programs in **health and safety education**.

**Facts to Keep in Mind about Concurrently Enrolled Students**

- Although concurrently enrolled students may participate in the program, the program must be designed primarily for adults and must not supplant the high school program. *No more than 10% of the district’s total ADA for all pupils in grades 9-12 can be claimed by the adult education program (EC 52616.17).*
- Concurrently enrolled students, as all adult students, may attend classes in facilities that do not meet Field Act requirements.
- No course required by the district for high school graduation or needed for maintaining satisfactory academic progress shall be offered exclusively through Adult Education.
- Generally, concurrently enrolled students take classes to make up graduation deficits. Students also may take classes that supplement and enrich (215.5) EC 52523(d).

**Examples of Courses Not Open to High School Students**

Based on Education Code 52523(d), the following are examples of courses not available for credit to concurrently enrolled high school students:

- Driver’s training and education
- Physical education
- Visual and performing arts
- Yearbook or newspaper
- Athletic training
- Student government
- Cheerleading
- Extracurricular clubs
- Spirit Groups
- Bands

**Independent Study**

Independent Study in adult education provides a valuable mode of study for students in high school diploma programs who have unique scheduling needs. The nature of independent study makes this approach successful for students who have difficulty attending regularly scheduled semester classes. The following records must be kept:

- A copy of the adopted school board policy and administrative procedures concerning Adult Independent Study;
- Independent Study Program Agreements, including representative samples of student work;
- A record of students participating in independent study showing both credits attempted and awarded to each student; and
- An attendance register maintained separately from the other attendance records.

**Independent Study Facts**
• Adult students may enroll in high school diploma classes through Independent Study.
• Students in adult independent study may work more than 15 hours a week on independent study, but only 15 hours of attendance per student per week can be claimed.
• Independent Study can be offered as open entry-open exit. Students may start the program any time during the year, and they may drop out and re-enroll as necessary.

Catalogs and Brochures

Most adult schools publish and distribute flyers or brochures of classes offered. All state-funded classes must be approved by the CDE Adult Education Office. State-funded and community service or fee-based classes should be listed separately.

Catalogs can be printed by your local paper, sometimes at a lower price than “in-house” printing. (Check with your district office; many districts require that all printing be handled by the district print shop.) Review the cost effectiveness of producing catalogs and brochures. Sometimes, a simple one-page listing of classes sent home with K-8 students within the district can be an effective way to advertise, particularly if cost is a concern.

Catalogs should be mailed approximately one month to six weeks prior to registration. Include course numbers and an enrollment form in your catalog, brochure, or flyer. This helps make on-site registration more efficient and less time-consuming.

Enrollment

Students must complete enrollment forms that meet local school district policies before a school can claim ADA. Basic information includes the following:

• Student number
• Name
• Address
• Phone number
• Sex
• Date of birth
• Highest year of school completed
• Registration date
• Language group
• Ethnic group

Enrollment forms must be kept for 3 years (The auditor will verify that enrollment forms are on file). High school records (transcripts) must be kept permanently.

CDE defines an adult student as “a person beyond the age of compulsory school attendance and who is not concurrently enrolled in a comprehensive high school or compulsory education program.”
**Definition of an Adult Student**

Education Code defines “adult” as a person beyond the age of compulsory school attendance and who is not concurrently enrolled in a comprehensive high school or compulsory education program.

**Concurrently Enrolled Students**

Adult schools must follow the intent of the law. Adult Education’s first priority is to serve adults. Classes must be advertised for adults and be offered at times and locations convenient for adults. Adults must receive preference for enrollment. Classes shall be under the supervision and jurisdiction of the adult education administrator. A high school student can be counted as concurrently enrolled only if he or she is enrolled for the minimum day at a regular high school or continuation or opportunity school before enrollment in an adult education program, course or class (EC52523, 52500.1).

**Attendance**

**Average Daily Attendance**

A major difference between K-12 and Adult Education attendance accounting is the formula for establishing ADA apportionment. The basic ADA computation produced by student attendance in Adult Education is as follows:

- **525 hours of attendance equals one adult unit of ADA**
- **180 minutes equals 1 apportionment day**
- **175 days is a school year (Students can attend more)**
- **175 days X 3 hours = 525 hours = 1 ADA**

To calculate ADA, divide the total hours of attendance for all students and programs by 525.

**ADA Comparisons**

K-12 or 9-12 Positive Attendance AND 180 X 4 = 720 HOURS = 1 ADA
K-12 Independent Study Worked Accomplished

ADULT Including Concurrent Positive Attendance 175 X 3 = 525 HOURS = 1 ADA
AND Independent Study Worked Accomplished

The base revenue limit dollars per ADA in Adult Education also differs from that in K-12.
Required Data
Adult education schools must be diligent in collecting enrollment data. Those schools receiving federal adult education funds also must collect student-level data as required by the California State Plan for Adult Education and the federal National Reporting System (NRS). Schools should use the following TOPSpro forms:

- **Entry Record and Update Record:** Collects accountability data from all students in all programs. The Entry Record collects student demographics, instructional program and level data, as well as learners’ reasons for attending adult education programs. The Update Record collects student progress and results after a period of instruction. The data is used to analyze current needs for adult education services.

- **Test Record:** Collects CASAS test item responses (automatically scored by TOPSpro) as well as hours of instruction for those students in programs supported by federal adult education funds. This data is used to report student learning progress in federally funded programs to the federal government and to calculate performance-based funding levels for local programs.

- **Workforce Supplement Entry and Update Record:** Collected for all Performance-Based Accountability (PBA) vocational education students and CalWORKs-eligible students. This record is used to collect information about services that CalWORKs-eligible learners receive. The record compares the outcomes of PBA vocational students in adult schools with outcomes of vocational students in other state-funded training programs. Future funding is based on student success.

Possible Assistance for Data Collecting Procedure:
Because data collection is time-consuming, administrators of small adult schools may find it helpful to seek alternative methods to collecting needed data. Some options include:

- Explore collaborating with a larger adult school to collect and analyze your data.
- Develop an informal consortium to pool funding for purchases, such as an optical mark scanner for scanning TOPSpro records and other forms.
- Collaborate less formally with other adult schools in the area.
- Meet with other community agencies such as senior citizens, parks and recreation, and local service clubs.
- Partner with agencies such as One-Stop Centers, Department of Rehabilitation, mental and physical health care providers, food banks, and social service agencies to provide appropriate student referrals, and to share resources such as personnel to work with students, obtain donations, provide testing services, assist with student support services, etc.
- TOPSproNet allows small schools to maintain their data online. For more information, contact CASAS. (http://www.casas.org)
Areas of Special Audit Concern

- Adult Education may not supplant the K-12 program. No high school courses can be offered ONLY through adult education.
- Counseling of concurrent students must be completed (with dated signatures) before student enrollment.
- Break time cannot be claimed for apportionment.
- A full hour of student attendance may not be given for classes that meet for fewer than 60 minutes.
- Minute-by-minute individual attendance must be claimed in a lab class where a required attendance time is not set or mandated.

How and when to collect, report, and maintain accurate, auditable attendance records

ATTENDANCE REPORT J-18/19 (basis for determining adult school apportionment for the current year based on the previous year’s report). The district’s business office submits this report to the County Office of Education three times a year. The attendance reporting periods are known as P1, P2, and Annual.

Report Periods:
- P1: July 1 - December 31, reported in early January
- P2: July 2 - April 15, reported in mid-April
- ANNUAL: July 1 - June 30, reported in early July

Report Details
- The adult school usually completes C. 1 through 3 and L of the J-18/19.
- Concurrent enrollment is reported in section C1.
- Students 19 years or older not continuously enrolled since their 18th birthday participating in full-time independent study are reported in section C3.
- CalWORKs students included in section C2 are reported separately in section L.
- Numerical data is reported as ADA, with figures rounded to two decimal points.
- Computation for P1 and P2 are projections of the year-end ADA for the school year, whereas the annual report is the actual ADA for that school year.

Addendum to Annual Attendance Report J-18/19 — J18/19A

The function of the addendum is to provide ADA and enrollment data to CDE for the 10 state authorized programs in adult education. The total of the categories 1-10 in the ADA column must equal the reported values of line C2 and C3 of the J-18/19A.
The Adult Education Budget

Budgeting can be a challenge for all administrators, regardless of the size of the adult school. However, budgeting for a small adult school with its limited adult education funds can be particularly challenging. It requires attention to detail, some creative thinking, and fairly accurate estimation skills. If an administrator understands the intent of the Education Code’s budget language as it relates to adult school programs, budgeting activities can be as flexible as necessary to respond to community needs within the ten authorized program areas.

Adult school funds must be spent on appropriate adult school expenses, and the district must establish and maintain a separate fund for all adult school transactions. Money must be expended according to EC 52616.4.

Historically, the adult school base revenue limit has been calculated at a lower level of the revenue per ADA received by K-12 schools. Adult Education’s revenue limit requires innovative practices to secure supplemental income. Increase of the base revenue limit is legislated through annual Budget Act language and is based on a Cost of Living Adjustment (COLA). The CDE apportions each adult school a maximum amount of the revenue funds that it may earn each year based on the ADA “cap.” When schools do not meet cap, the unused dollars are returned to the state general fund. Adult school administrators must track ADA and monitor expenses to ensure that expenses do not exceed income.

Improper use of a district’s adult education funds could result in the requirement for the school district to repay double the amount that had been improperly charged to adult education. This amount shall be used only for improvement of the adult education program.

Augmenting the Adult School Budget

(Source: CALPRO Adult Education Administrator’s Online Guide http://www.calpro-online.org/o_guides/admin_og/pdf.asp, chapter written by Laura Stefanik)

Balancing the adult school budget can be an agonizing or an empowering process, depending on the individual administrator’s approach. Adult school administrators often face uncertainties on both sides of the budget sheet, that is to say, on both the revenues and expenditures sides. On the revenue side, uncertainties may include unexpected changes in adult education revenue-limit funding (i.e., ADA reimbursement), unavoidable delays or changes in letters of encumbrance, and student attendance deficiencies in classes that generate ADA reimbursement.

On the expenditure side, there may be uncertainties related to staff cost of living adjustment (COLA) increases, unexpected salary increases or benefits hikes, increases in rents or utility rates, and damage to or loss of instructional materials, equipment, and facilities. Other issues that can also have an impact on the budget include unresolved or ongoing political issues at the state level, poor communication between an adult school and its local district business office, and administrative turnover.
Administrators can protect their budgets from unpredictable shortfalls by securing additional monies from outside sources. Commonly, such outside funding flows from two broad streams: grants and donations, and fee-based community classes and programs.

**Grants and Donations**

An adult school can seek grants and donations from individuals, businesses, and/or community agencies. Cash grants, donations of goods, and in-kind services can all provide revenue cushions to augment the adult school budget. It is worth an agency’s time and effort to seek grants and solicit donations. Although the process of seeking outside funding may seem daunting at first, experienced administrators report that, with each success, the process becomes increasingly familiar and easy to manage. To secure outside funding, the adult school has four responsibilities that are ongoing and continuous. These responsibilities are described below.

1. **Collaboratively identify school goals and funding priorities.** Set aside at least six months to create a Development Team, composed of representatives from various sectors within the school (i.e., students, teachers, department coordinators, administrators, support staff). Have the Development Team review your school’s mission statement and its goals and objectives. As a team effort, decide on the goals that require additional funds or resources to meet the needs of your adult school program and the educational needs of your community. Sort those goals into short-term and long-term categories, prioritizing the goals within each category. Choose no more than two or three goals to begin work on. Be sure that at least one of the goals you select is short-term. The achievement of a short-term goal early on in the process of seeking funding will energize the Development Team and give it a sense of accomplishment at that same time that it will lend credibility to your efforts in the eyes of the larger staff of the school.

2. **Establish and Nurture Community Contacts.** Get to know your community. Get involved personally in local businesses and service agencies. For example, participate in local chamber of commerce events; volunteer to serve on boards of local businesses and service agencies; host an open house and other events for the community on your campus. Learn as much as possible about your community, your students, and the resources in your area. Consult your local chamber of commerce directory for business contacts. Be sure that you do not overlook small businesses because they often are especially accessible and supportive. Community agency contacts can be found through city and county offices. Ongoing community involvement puts your adult school and its offerings in the limelight, thereby making it more attractive to potential sponsors.

3. **Identify potential funding sources.** With your Development Team, start matching your adult school’s identified priorities to the goals of potential funding sources. Research the activities that various funders are/are not likely to support. Investigate funding sources by phone, mail, and the Internet. Create a diagram that matches potential funders with your school’s specific needs. Inquire of leaders of other adult schools about their experiences with various funding agencies. Prioritize funding sources, taking into consideration application deadlines, funding amounts, funding restrictions, and accountability requirements. Also consider whether the period of the grant award and whether the funding agency permits grantees to reapply for funds beyond the initial grant period. Guided by all these considerations, choose two or three grants or donations to pursue. Some private foundations that support educational
projects include Koret, Packard, and Kaiser. Adult schools can also seek grants from public sources including Even Start, Welfare-to-Work, One-Stop Centers, and the California Department of Education. You can find valuable grant information on the OTAN Web site. (http://www.otan.us)

4. **Develop, Write, and Submit Applications for Grants and Donations.** With your Development Team, review the requirements of each grant application. Once you have decided on the funding source for which you wish to apply, ask your team to help conceptualize and outline the main points of the proposal. Divide the proposal into sections and delegate the writing to those who are best qualified to respond to each section and to develop a first draft. Identify individuals to serve as final-draft writers and information-gatherers. Identify someone to produce a polished budget request. Appoint an overall coordinator to ensure that the application process is followed precisely and in a timely manner, including mundane but essential tasks such as content review, style review, proofreading, printing, signature-gathering, duplication of copies, and mailing/delivery of the application. Many grant proposals are disqualified because they are incomplete, off-topic, or received past the advertised due date. Make a follow-up phone call after your grant application has been received at the funding agency to inquire if everything is in order and to alert the funder that you are available to answer questions or provide additional information about your proposal.

You do not have to hire a professional grant writer to write successful proposals. Your Development Team can collaborate to gather the necessary information, with the final writing being handled by a good writer on your staff who is not necessarily an expert on the topics covered in the grant application. When reviewing the final draft, be sure the information provided is accurate and that the proposal clearly identifies the following: the population you intend to serve, the population’s specific needs, the proposed project’s goals and objectives, the activities that will accomplish those goals, a timeline for project completion, your accountability and evaluation processes, and an error-free budget page. The budget generally lays out all costs for salaries, benefits, instructional materials, non-instructional supplies, professional development of staff, administrative overhead, and local contributions or in-kind offerings.

Be sure to obtain a certified, return receipt when using mail services to submit a grant application. Funding agencies generally do not accept faxed grant applications. Remember to retain both an electronic file and a hard copy of your completed proposal for your files. You may need to refer to these files if the funder contacts you with questions about the proposal. You may also find that sections used for one proposal can serve as boilerplates for similar sections in other proposals, so the electronic files may come in handy.

**A Word of Caution:** Be careful what you apply for. Grants can either be a helping hand to the small Adult Education program or they can become a nightmare of paperwork, particularly if the program lacks the needed staff to manage the grant. Grants are worth the extra effort if the following factors are taken into consideration:

1. Will your district office be assisting with the grant-writing process?
2. In reviewing the grant criteria, do you have the resources to provide the framework required to meet grant specifications?
3. Will grant monies be substantial enough to enhance existing programs or will they require that new programs be implemented?
4. Will administration of the grant require additional clerical assistance, etc.? If so, does the grant allow for these costs?

Grant opportunities can be found on the California Department of Education Web site. It is recommended that you register at this site to receive notification of grants as they become available. For more information on identifying funding sources and writing winning grant proposals, visit the CALPRO Web site. It contains an online guide, *Shaking the Funding Tree*. Visit [http://www.calpro-online.org/o_guides/sft_res_og/1.asp](http://www.calpro-online.org/o_guides/sft_res_og/1.asp)

### Fee-based Community Classes and Programs

Unlike publicly funded instructional programs that promote benefits to society as a whole, fee-based classes usually are designed to accommodate the personal interests and specific information needs of particular groups of adult students. Sometimes referred to as “community service classes,” these fee-based classes can range from complete ten-week programs to single two-hour seminars. They can cover a wide variety of subjects, from “Ikebana Flower Arranging” and “Raising Earthworms for Fun and Profit” to “Computer Graphics” and “Estate Planning.”

Adult schools that offer fee-based classes often realize many benefits. For instance, fee-based classes can provide excellent opportunities for schools to increase their client bases. Students who attend fee-based, special interest classes also are exposed to traditional, publicly funded classes and may enroll in those as well. When fee-based classes are designed to offer staff training to the local business community, they may provide adult schools with expanded access to new clients and facilities. In addition, fee-based classes present opportunities for adult schools to earn additional revenues to subsidize ongoing instructional programs. These revenues often are shared with school partners where facilities are shared, and they can pay for scholarships, thereby further serving the educational needs of the community. Such methods of income sharing serve as tremendous boosters of goodwill between the school and the local community.

If your adult school is responsive to the needs of your community, there is a potentially never-ending stream of funding that your school can realize from offering fee-based community classes and programs. For this to occur, your adult school must have a clear identity, know and analyze its competition, and recognize and respond to the needs of the community through its programming. For the successful operation of a fee-based program, an adult school has four responsibilities that are ongoing and continuous. These responsibilities are described below.

1. **Identify school goals and strengths.** Form a representative Outreach Team, similar to the Development Team discussed under the section on Grants and Donations, to lead the process of establishing a solid fee-based program. To enter into the marketplace, the school must know what it has of value to offer the community. At times, the school will need to invest in itself to increase the value of its offerings. For example, the school might purchase upgraded computer equipment to enable it to offer current technology courses. The school should make such investments with school-wide goals in mind, seeking to enhance the image of the adult school throughout the community.

2. **Establish and Nurture Community Contacts.** The community information needed by the developers of successful fee-based programs is similar to the information needed by grant writers. Conduct your own community surveys or obtain current profiles and needs assessments of your community. Network with local adult schools and
community agencies for ideas, resources, and qualified teachers. Get tips, ideas, and support from colleagues who run successful fee-based programs. Approach local businesses about offering classes at their sites and about recruiting qualified part-time teachers to staff your fee-based classes.

3. **Link Your Program to Community Needs.** Tap the experts who may be hidden in your school and invite them to participate in brainstorming for ideas about new programs and classes, with special consideration given to topics that might currently be popular. Solicit ideas for new courses and recruit topic-specific teachers by advertising widely, including placing notices in your course catalog, within your campus, and on your adult school Web site. Continue to evaluate and review current and potential offerings and teachers at your adult school. Keep a constant eye on local competition; observe what the competition offers and the success of these offerings. Consider whether you might also offer or expand on courses that are popular in your community.

4. **Schedule and Offer Fee-based Classes and Programs.** Schedule classes that seem to fit special niches and are not offered anywhere nearby, offer more sections of popular classes that fill up each semester, and seed new classes to expand your offerings. Build on current offerings, but do not hesitate to take a chance and start something new. Be sure to maintain collected fees and expenses from fee-based classes separate from those of state and federally funded (ADA reimbursable) classes. If you charge a fee for a class, you may not collect ADA for the same class.

Augmenting your adult school budget need not be a mystery. A financially solvent adult school is an energized adult school with a vision for the future. Financial solvency is based, to some degree, on cost flow. In other words, an agency must maintain some revenue to cover expenses, seed new programs for growth, remain competitive in the education market, and maintain an adequate reserve. Applying for grants and donations as well as developing fee-based programs are effective ways to contribute to your school’s overall financial health.

**Textbooks and Curricula**

Small schools operate on a stringent budget. As a result, ordering new textbooks often is a dream rather than a reality. There are, however, options for acquiring textbooks when finances will not allow for the purchase of new books.

- Contact high schools to ask for books that **recently** have been replaced as a result of new textbook adoption.
- Purchase from publishers who buy used textbooks.
- Contact larger adult education programs to find out if they are replacing books or if they have a surplus.
- Meet with local clubs, organizations, and businesses to discuss your school’s needs and request a financial donation to purchase textbooks.
- Research grant opportunities that fit the course content.

If the adult school uses the same textbooks as the district high school, these textbooks will already have been approved by the district Board of Trustees. If you want to acquire new textbooks that have not been used in the district, you will need Board of Trustees’ approval. Ask for a copy of your district’s board policy on textbook adoption (CSBA Sample Policy #6161.1).
Students may not be charged for books if they are enrolled in ESL, citizenship, ABE, GED, and high school diploma classes. Students enrolled in other classes may be charged for books, provided that fees charged do not exceed the actual cost of the books to the district (EC 52616.4(a)(1)(2). Note: Shipping, tax, and personnel processing costs can be factored into price of books.

Networking/Support

Small Adult Education schools often do not have the resources or money to send staff to professional development workshops and training sessions. However, there are several organizations that provide invaluable free assistance to administrators of small adult schools.

CALIFORNIA DEPARTMENT OF EDUCATION, ADULT EDUCATION OFFICE (CDE/AEO)
The CDE Adult Education Office has consultants who are available to visit the school site, work directly with the administrator, and provide continuing support via telephone and e-mail (http://www.cde.ca.gov/sp/ae). Appendix B of this guide contains the current Adult Education Office staff directory.

Leadership Projects of the California Department of Education

- CALIFORNIA ADULT LITERACY PROFESSIONAL DEVELOPMENT PROJECT (CALPRO)
  It is always beneficial to network and share ideas with other adult school administrators. To support this, CALPRO offers administrator networking groups. For schedules of networking groups in your area, check the CALPRO online calendar at http://www.calpro-online.org. CALPRO also operates a two-year Leadership Institute for practicing adult education administrators. The goal of the Leadership Institute is to enable adult education administrators to gain effective management and quality leadership skills that will enhance their capacity to operate an adult education program. The Institute consists of 5 days of training a year for each of two years. The CALPRO Web site contains additional information and an application for the Leadership Institute. In addition, CALPRO offers Just-in-Time Leadership workshops for new administrators on topics of fiscal management and personnel and legal issues. These workshops are offered at the 10 CALPRO Professional Development Centers (PDCs) across the state. See Appendix G for a listing of the CALPRO PDCs. Mentor training is available for seasoned administrators who are willing to serve as peer coaches for new administrators. In addition, the CALPRO Web site offers many helpful publications and online guides (http://www.calpro-online.org).

- CALIFORNIA DISTANCE LEARNING PROJECT (CDLP)
The CDLP licenses statewide instructional media resources for local use, provides technical support and training services in using distance learning, and offers online services for adult learners and teachers (http://www.cdlponline.org).

- COMPREHENSIVE ADULT STUDENT ASSESSMENT SYSTEM (CASAS)
  CASAS provides training and technical assistance to local program administrators, data managers, and teachers through regional workshops. Topics include accountability, CASAS implementation, and TOPSpro software. CASAS sponsors EL Civics networking meetings regularly to meet state and federal requirements. The CASAS National Summer Institute facilitates collaboration and networking among programs and states that are implementing CASAS to meet national and state
accountability requirements. The CASAS Web site provides many helpful resources, including student and program-level data from prior years. Visit the CASAS Web site (http://www.casas.org) to access online registration for regional workshops, networking meetings, and the CASAS Summer Institute.

- **OUTREACH AND TECHNICAL ASSISTANCE NETWORK (OTAN)**
  OTAN provides a wide spectrum of information services and links free for adult education administrators and teachers who log on to the OTAN Web site and establish a user name and password (http://www.otan.us).

**ASSOCIATION OF CALIFORNIA SCHOOL ADMINISTRATORS (ACSA)**
ACSA is actively involved in all facets of education K-12 and has an Adult Education Committee. Each year, an annual conference provides an invaluable opportunity to learn about issues and trends in adult education and to gain new networking opportunities (http://www.acsa.org).

**CALIFORNIA ADULT EDUCATION ADMINISTRATORS’ ASSOCIATION (CAEAA)**
CAEAA is a statewide organization for administrators or management personnel who work in, or support, adult education programs. CAEAA maintains regular communication concerning adult education issues (http://www.caeaa.org).

**CALIFORNIA COUNCIL FOR ADULT EDUCATION (CCAE)**
CCAE takes a leadership role in promoting adult education and provides professional development, primarily for teachers (http://www.ccaestate.org).

**CALIFORNIA STATE CONSORTIUM FOR ADULT EDUCATION (CSCAE)**
Dedicated to supporting “adult education through local and state advocacy, professional development, and promotion of high standards for the field,” CSCAE members comprise more than 3,000 teachers, clerical workers, administrators, students, and supporters (http://www.cscae.org).

**COMMISSION ON ADULT BASIC EDUCATION (COABE)**
COABE is a national professional organization that provides leadership, communication, professional development, and advocacy for adult education and literacy practitioners to advance quality services for all adult learners (http://www.coabe.org).
Appendices
## Appendix A. California Education Code

The following listing refers to California Education Code. To see the complete text of these Ed Code Sections, visit [http://www.leginfo.ca.gov/calaw.html](http://www.leginfo.ca.gov/calaw.html)

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A-3
Appendix B-1. Budgeting Revenue Projections

**Apportionment/Entitlement Calculations**

Revenue projections are a major function of budget development. Budget estimates of revenue should be as accurate as possible. It should be remembered that the budget is a financial plan and should not be set in concrete. It is important to continuously update revenue estimates when necessary. The adult education revenue limit calculation needs to be recalculated for the projected budget, and revised with each revision of the Governor’s budget and at year-end.

The revenue in object codes 8011 and 8019 is used to calculate the State Entitlement portion of that revenue. Adult education is funded based on the annual ADA that is generated. Certification of the prior year’s generated revenue is sent out in February. Current-year P2 certification is delivered in late June. A district’s adult education revenue limit is the adult education’s largest source of funding.

**Adult Education State Block Entitlement – Current Year**

Budget process for State Aid Current Year is based on the calculations on Form S of the Revenue Limit forms. Object code 8011 should agree with line M of Form S (EDP No. 340). Each district’s Adult Education Block Entitlement is available on-line, at http://www2.cde.ca.gov/principalapp/, under “Apportionments Exhibits,” which are listed by county.

**Apprentice Transfer from the General Fund to Adult Education Fund**

Apprentice program hours should be budgeted for actual hours projected. Record the apprentice hours transfer from the general fund to the adult education fund. Include a transfer for apprentice hours only when appropriate students are being educated in the adult education program. The Adult Apprentice transfer should agree with line J of Form K-12 (EDP 087), only when Apprentice activities are operated through the school district’s adult education program.

By law, all K-12 Revenue Limit apportionments must be remitted by the state, via the county office of education, to the applicable district’s general fund. Within a reasonable time, the district general fund must transfer all apprentice apportionment funds earned by adult education into the adult education fund.

**Federal Funds**

Adult education programs may derive income, in addition to funds provided by state and local sources, by participating in federally funded programs, such as those under the Workforce Investment Act and the Carl D. Perkins Vocational and Technical Education Act.

**Adult Education Fees**

Budgeting fees takes some planning. Offering courses that address “hot topics” in the community may promise to generate additional revenue. To support this, the program manager may need to increase the number of some classes and/or close others. Flexibility is key.
Charges for Books in Adult Classes

“The governing board of each high school district may establish a charge not to exceed the cost of the books, plus handling and shipping charges. The total of books, materials, and fees required, plus revenues derived from average daily attendance may not exceed the estimated cost of all such classes. In lieu of establishing such charges, the board may lend books to students and require students to make deposits. The deposit made by a pupil is refunded on the return of the book in good condition, with reasonable wear and tear expected.

No required charge of any kind, including the purchase of books, is allowed for adult students enrolled in ABE, ESL, ESL-Citizenship and High School subjects when the student does not hold a high school diploma. A student can be offered the option of buying a book but the purchase cannot be a condition of attending the class.”

Joint Programs: ROC/P and Adult Education

Regional occupational centers and programs may jointly establish, operate, and share the enrollments and cost of vocational education instruction with adult education programs offered by school districts serving the same geographic area. Such programs shall be approved by the State Board of Education and the County Superintendent of Schools and shall be subject to guidelines established by the State Superintendent of Public Instruction.
Appendix B-2. Budgeting Expenditures

The money in the Adult Education Fund of a school district must be expended according to EC 52616.4 the following is a summary of the guidelines as contained in the Education Code.

1. **Direct Instructional Costs**
   - Salaries and benefits of adult education teachers and aides
   - Textbooks and instructional supplies
   - Repair, maintenance, acquisition, and replacement of instructional equipment

2. **Direct Support Costs, Defined as Follows:**
   A. Instructional administration and instructional media costs that are supported by auditable documentation. Instructional administration costs include the documented costs of individuals who, regardless of the specific job title, administer the district’s adult education program.
   B. School administration and pupil services costs that are supported by auditable documentation and that represent the activities of individuals whose employment by the school district is used exclusively in support of the adult education program, or school administration and pupil services costs that are supported by auditable documentation and that meet all of the following conditions:
      - Costs that are able to be identified in a separate contract with the adult education program.
      - Administration and services that are provided exclusively to adult students and only for the period identified in the contract made with the adult education program.
      - Services provided during a time that is different from services to pupils in kindergarten and grades 1-12, inclusive, and administration provided after 4:00 p.m.
      - Persons who provided the services and administration to adult students report to the adult education director during the period of the contract.
      - The person providing the administration immediately supervises the adult school personnel.
   C. Plant maintenance and operations costs, including costs for facilities that are used to provide child care services to the children of the students attending the adult education at a particular site as follows:
      - For facilities that exclusively house adult education programs, the costs that are supported by auditable documentation.
      - For facilities that are used by more than one program, including the adult education program, a district may charge the adult education fund for an amount attributable to the adult education program. This charge shall **not** exceed the amount derived from the following calculation:
**Budgeting Expenditures (Cont.)**

a) Calculate according to the general description in the California School Accounting Manual, the prorated number of classroom units the adult education program used for instructional and child care programs.

b) Calculate the total number of classroom units in the district.

c) Divide the amount calculated in (a) by the amount calculated in (b).

d) Multiply the quotient calculated in (c) by the district’s total plant maintenance and operation costs.

Facilities costs for non-district-owned facilities that exclusively house adult education programs, including, but not limited to, costs of facilities that are used to provide child care services to the children of the students attending the adult education program at the same site.

Facilities costs for the acquisition of facilities originally acquired by adult education programs, or for the restoration of those facilities, including costs for debt service for the acquisition, and/or restoration of a facility, including the costs of facilities that are used to provide child care service to the children of the students attending the adult education program at the same site.

Auditable documentation means time reports and other contemporaneous records that establish the time an individual employee spent working for the adult education program, and documentation that supports non personnel costs and substantiates the adult education program received the service, supply, or equipment. The documentation shall comply with the documentation requirements set forth in the California School Accounting Manual pursuant to Section 41010.

3. **Indirect Costs**

Indirect costs of the adult education program may be charged according to the following:

- Indirect costs can be charged at the lesser of the following: the school district’s prior year indirect cost rate as approved by the California Department of Education, or the statewide average indirect cost rate for the second prior fiscal year.

4. **Alternative to Items 2 and 3**

As an alternative to items 2 and 3 above, a school district may transfer not more than 8% of the annual revenue deposited in the District’s General Fund for expenditures the District incurs in operating the adult education program.

5. **In the Event of Violation of This Section of Ed Code**

If the California Department of Education and the Department of Finance concur that a school district has violated this Section (52616.4), the Superintendent of Public Instruction shall direct the school district to transfer double the amount improperly transferred to the district’s general fund from that fund to the district’s adult education Fund for the subsequent fiscal year and the amount shall be used for the improvement of the district’s adult educational fund. If the school district fails to make the transfer as directed, the Superintendent shall reduce the district’s regular apportionment determined pursuant to Section 42238 and increase the district’s adult block entitlement determined pursuant to Section 52616 by that amount, and this increase shall be used for improvement of the district’s adult education program.
Budgeting Expenditures (Cont.)

Certificated and Classified Salaries (1100-2900)

Salaries should be projected with information on the number of staff/positions in the district measured in full time equivalents (FTE). “This information should be maintained within the district’s position control system and at the school site. Minimum personnel information includes job assignments, with FTE, pay rate for the assignment, and assigned employee.” During budgeting of salaries, you must take precautions to insure that all permanent ongoing job assignments are budgeted even if they are currently vacant. For this reason, it is imperative that the district either have an operating position control document or some type of spreadsheet or document with all district job assignments.

The great majority of teacher salaries in most adult programs will be for contracted or hourly positions. This presents a budgeting challenge. Several options may be considered for budgeting the hourly salaries:

- Use prior year historical costs with adjustments for new year hourly rate information and adjustments for new, deleted, expanded positions or programs;
- Use the teacher contract amounts;
- Use some factor such as an average hourly teacher salary and multiply the number of hours the classes will be offered.

As in the general fund, overtime salary accounts and substitute salary accounts should be budgeted. The most reliable indicator in these types of accounts is historical information. Adjustments would be needed if the Adult School had expanded programs or experienced any changes in the programs or activities offered in the school.

Benefit Accounts (3100-3900)

These percentages are true for 2002-2003.

STRS-State Teacher Retirement (3100) – 8.25%

Expenditures should be budgeted at 8.25% of STRS qualified gross salaries. Since most teachers are employed less than 50%, they can elect STRS or select the retirement alternative.

PERS – Public Employee’s Retirement System (3200) – 13.02%

This will not be a significant problem in the adult fund, but it must be budgeted. The qualified PERS classified employee salaries should be budgeted for 13.02%, with the percentage split between 7270 and 3200. PERS advises on the rates in January and June and the district can either base the entire year expense on the June rate or prepare a composite of the partial year rates.
Budgeting Expenditures (Cont.)

FICA – Social Security and Medicare (3310/3320 and 3330/3340) – 6.2% & 1.45%

These rates are based on percentages of the gross wages. The percentages do not often change, but, when they do, the change will occur on January 1, and there should be sufficient notice to budget properly. These rates are controlled by the Federal government. These limits are set annually by the Social Security Administration. In the 2001-2002 fiscal year, the Social Security rate was 6.2% on amounts earned up to $61,200. The Medicare rate was 1.45% and there was no limit on earnings. These percentages differ for each district and the district’s business manager should be contacted for the most recent rates.

Retirement In Lieu of OASDI (3350/3360) – 6.2%

Employees not covered by OASDI may include part-time staff under four hours per day (based on an eight-hour day) or substitutes, etc. Federal regulations require covering these employees under OASDI at 6.2%. Offering an alternative rate under 403B (TSA) rules can save the district costs. The critical point here is that all staff should be covered by a qualified plan with either STRS, OASDI, or an alternative in lieu of a retirement plan, and budgeted accordingly. The budget would be based on the percent the district has agreed to pay for employees. Consult the Personnel Department or employee contracts for these percentages and budget based on prior years’ experience.

Health and Welfare (3400)

Budgeting for health and welfare costs is based solely on the individual district’s negotiated packages. It is imperative to have a copy of each labor contract as well as contracts for employees not covered by a labor organization. Amounts paid for retired employees should be included, if these benefits are district paid and the adult education fund is charged.

Unemployment Insurance (3500)

This rate is set by the State and is generally known in the spring for a July 1 change. This percentage is applied to the gross wages of all employees, except for student workers who are enrolled in a district school.

Worker’s Compensation (3600)

The district’s unique rate is determined by the insurance carrier or JPA for that district. The rate is announced in the spring for a July 1 change and is applied to all gross salaries.

Other Employee Benefits (3900)

Budget for this category would be based on the district’s negotiated package with labor unions or contract with employees. This benefit is generally tax-sheltered annuities offered in lieu of health benefits. Be sure to check with the Personnel Department for other types of offerings unique to the district.
Books and Supplies (4100 – 4900)
The adult education fund will budget for books and supplies in accordance with the district’s unique guidelines set up by the Board of Education.

Textbooks (4100)
Each school district has a plan for the future use of textbooks. Historical tracking can bring some measure of reliability to budgeting for textbooks. The adult education program will use textbooks that are approved by the Board of Education.

Books Other than Textbooks (4200)
The need to purchase and/or replace supplemental books is often the responsibility of the coordinator/principal of the adult education program. Using a prior year or multiple year trend would be the best method to use for budgeting this area.

Instructional Materials and Supplies (4300)
Teachers often submit their needs for the future year to the principal, who will make the final determination of the budget and its approval. Again, historical data and projected class sizes and enrollment are determining factors. Additional consideration should be given to computer technology, with respect to the cost of software, some upgrades, and in some cases, replacing books, plus an inflation factor.

Other Supplies (Non-instructional) (4500)
Again, each adult education program must be aware of needs in the areas of office supplies, general maintenance supplies, custodial, computer software and supplies. Historical data is especially helpful in establishing a cost-per-pupil with regard to office, custodial, and other supplies. Computer software and supplies will be the most varied because of new upgrades, fast changing software, and the need for disks.
Budgeting Expenditures (Cont.)

Services and Other Operating Expenditures (5100 – 5900)

Services and other operating expenses cover a wide variety of categories that have different methods of budgeting techniques that can be applied. The most common budget approach is a maintenance of effort looking at prior year expenditure patterns and projecting those forward to the upcoming year.

Personal Services (5100)

This object code is for personal services that provide direct assistance to teachers, pupils, or the curriculum or health programs of the adult education program. These may be provided by the individuals or companies that specialize and have expertise in these various area of content. This object of expenditure category is usually found in the instructional programs of the district. This object should not be an administrative program of the district.

Travel and Conference (5200)

The most direct way to budget for these expenditures is to look at these categories’ actual expenditures in prior years or several years with historical trends and project out the next year’s budget accordingly.

Dues and Membership (5300)

The adult education program may belong to many associations and organizations to keep abreast of the latest information associated with running adult education programs. Use prior year data for this object code.

Utilities and Housekeeping Services (5500)

If your adult education program is housed in its own building, separate from other district programs, the following expenditures will solely be the responsibility of the Adult Education Program:

- Water
- Fuel (gas)
- Power
- Lighting
- Telephone
- Waste Disposal
Budgeting Expenditures (Cont.)

In these areas, it is important to review the historical trends of the district over the past several years to get a feel of the increases and decreases for your adult education plant.

If your adult education program is sharing a site with other district programs, the district may charge plant maintenance and operation applicable to the adult education fund, but this charge cannot exceed the calculation previously given.

Rentals, Leases, and Repairs (5600)

This category covers expenditures for rentals, leases without option to purchase, and repairs or maintenance by outside vendors for all sites, buildings, and equipment owned by the adult education program. Obtaining the historical trend information from the past two years is a starting place for determining the cost of this area. In addition, the Purchasing Department should be able to review all purchase orders for both short- and long-term leases and all maintenance contracts entered into on behalf of the district for buildings and equipment. They should provide the total projected costs for these items in the coming fiscal year.

Direct Costs for Interprogram/Interfund Services (5700)

Many districts in the State of California budget these costs as a method of anticipating direct costs, which would be transferred between programs and funds within a district. The typical services that are transferred between programs include areas such as maintenance and operations, duplication services, field trips, and other centralized costs associated with the instructional program.

Other Services and Operating Expenditures (5800)

This category is for all other services that have not been identified through the other budget categories and includes some of the following areas:

- Advertising
- Legal expenses
- Audit expenses
- Professional and personal services – non-instructional programs
- Contracted transportation services
- Fingerprinting
Budgeting Expenditures (Cont.)

**Capital Outlay (6100 – 6900)**

Classification of an expenditure as capital outlay can be a difficult task. These expenditures result in an acquisition of capital assets or additions to capital assets. These can be expenditures for site, improvement of sites, buildings, improvements of buildings, building fixtures, service systems, and purchase of initial or additional equipment.

**Site and Improvement of Sites (6100)**

Acquisition of land, improvements of new and old sites and property of a permanent nature attached to land.

**Buildings (6200)**

Construction or purchase cost of new buildings and additions, including advertising costs, architectural and engineering fees, blueprints, inspection, demolition, razing of old buildings, building fixtures, service systems, and related expenditures.

**Equipment (6400 and 6500)**

Items of movable property of a relatively permanent nature and/or of significant value (i.e., greater than $5,000). Account 6500 is used for replacement of equipment. To differentiate between Supplies and Capital, use the following six test questions as a guide. If the answer to any question is “yes,” then the item is not capital, but rather, is a supply item:

- Does the item lose its original shape and appearance with use?
- Is it consumable, with a normal service life of less than two years?
- Is it easily broken, damaged, or lost in normal use?
- Is it more feasible to replace it with an entirely new unit than to repair it?
- Is it an inexpensive item, having the characteristic of equipment?
- Does the small unit cost make it inadvisable to capitalize the item?
## Appendix C. Adult Education Office Staff Directory

Secondary, Postsecondary, and Adult Leadership Division  
Adult Education Office, 1420 N Street, Suite 4503, Sacramento, CA 9814  
Debra Jones, Administrator  
djones@cde.ca.gov  
Phone: 916-322-2175 / Fax: 916-327-7089

<table>
<thead>
<tr>
<th>Regional Consultants</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allen, Karen</td>
<td><strong>Region 11a - Los Angeles County West</strong>: Los Angeles Unified School District, Adult School Districts within ACSA Region XIV, CBOs, Libraries, Community Colleges</td>
</tr>
<tr>
<td><a href="mailto:kallen@cde.ca.gov">kallen@cde.ca.gov</a></td>
<td>916-445-5676</td>
</tr>
<tr>
<td>Bollenbach, Sheila</td>
<td>Internal Education Programs Consultant</td>
</tr>
<tr>
<td><a href="mailto:sbollenbach@cde.ca.gov">sbollenbach@cde.ca.gov</a></td>
<td>916-319-0479</td>
</tr>
<tr>
<td>Cooper, Bert</td>
<td><strong>Region 2 - Northeastern</strong>: Butte, Glenn, Lassen, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity</td>
</tr>
<tr>
<td><a href="mailto:bcooper@cde.ca.gov">bcooper@cde.ca.gov</a></td>
<td>916-327-8765</td>
</tr>
<tr>
<td>Guzman-Walker, Gloria</td>
<td><strong>Region 5 - South Bay</strong>: Contra Costa, Monterey, San Benito, San Mateo, Santa Clara, Santa Cruz</td>
</tr>
<tr>
<td><a href="mailto:gguzman@cde.ca.gov">gguzman@cde.ca.gov</a></td>
<td>916-319-0311</td>
</tr>
<tr>
<td>Hurley, Diane</td>
<td><strong>Region 11b - Los Angeles County East</strong>: Adult School Districts within ACSA Region XV, CBOs, Libraries, Community Colleges</td>
</tr>
<tr>
<td><a href="mailto:dhurley@cde.ca.gov">dhurley@cde.ca.gov</a></td>
<td>916-323-2213</td>
</tr>
<tr>
<td>Kelly, Neil</td>
<td><strong>Region 7 - Central Valley</strong>: Fresno, Inyo, Kings, Mono, Tulare, Madera</td>
</tr>
<tr>
<td><a href="mailto:nkelly@cde.ca.gov">nkelly@cde.ca.gov</a></td>
<td>916-323-2601</td>
</tr>
<tr>
<td>Lindgren, Mary</td>
<td><strong>Region 3 - Capitol</strong>: Alpine, Colusa, El Dorado, Nevada, Placer, Sacramento, Sierra, Sutter, Yolo, Yuba</td>
</tr>
<tr>
<td><a href="mailto:mlindgre@cde.ca.gov">mlindgre@cde.ca.gov</a></td>
<td>916-445-7474</td>
</tr>
<tr>
<td>Maxwell, Wendi</td>
<td>Internal Education Programs Consultant</td>
</tr>
<tr>
<td><a href="mailto:wmaxwell@cde.ca.gov">wmaxwell@cde.ca.gov</a></td>
<td>916-324-7115</td>
</tr>
<tr>
<td>Moss, Cliff</td>
<td>Internal Education Programs Consultant</td>
</tr>
<tr>
<td><a href="mailto:cmoss@cde.ca.gov">cmoss@cde.ca.gov</a></td>
<td>916-327-6378</td>
</tr>
<tr>
<td>Norton, Karen</td>
<td><strong>Region 4 - Bay</strong>: Alameda, Marin, San Francisco</td>
</tr>
<tr>
<td><a href="mailto:knorton@cde.ca.gov">knorton@cde.ca.gov</a></td>
<td>916-323-7862</td>
</tr>
<tr>
<td>Park, Margaret</td>
<td><strong>Region 8 - Costa del Sur</strong>: Kern, San Luis Obispo, Santa Barbara, Ventura</td>
</tr>
<tr>
<td><a href="mailto:mpark@cde.ca.gov">mpark@cde.ca.gov</a></td>
<td>916-445-5724</td>
</tr>
<tr>
<td>Prater, Vicki</td>
<td><strong>Region 1 - Northcoast</strong>: Del Norte, Humboldt, Lake, Mendocino, Napa, Solano, Sonoma</td>
</tr>
<tr>
<td><a href="mailto:vprater@cde.ca.gov">vprater@cde.ca.gov</a></td>
<td>916-324-4935</td>
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C-1
<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Program/Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sanchez, Juan</td>
<td>Region 6 - Delta Sierra: Amador, Calaveras, Mariposa, Merced, San Joaquin, Stanislaus, Tuolumne</td>
</tr>
<tr>
<td><a href="mailto:jsanchez@cde.ca.gov">jsanchez@cde.ca.gov</a></td>
<td></td>
</tr>
<tr>
<td>916-323-5264</td>
<td></td>
</tr>
<tr>
<td>Schwendimann, Steve</td>
<td>Region 9 - Southern: Imperial, Orange, San Diego</td>
</tr>
<tr>
<td><a href="mailto:sschwend@cde.ca.gov">sschwend@cde.ca.gov</a></td>
<td></td>
</tr>
<tr>
<td>916-323-5277</td>
<td></td>
</tr>
<tr>
<td>Young, Myra</td>
<td>Region 10 - Rims: Riverside, San Bernardino</td>
</tr>
<tr>
<td><a href="mailto:myoung@cde.ca.gov">myoung@cde.ca.gov</a></td>
<td></td>
</tr>
<tr>
<td>916-323-4312</td>
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</table>

**Administrative and Program Support Services**

Berry, Rich  
Staff Services Manager  
rberry@cde.ca.gov  
916-322-2175

**Office Technicians**

Cordova, Rosemarie  
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916-324-7116

Lewis, Jennifer  
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Reyes, Cheryl  
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916-322-2176

**Analysts**

Akaki, Lianne  
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916-323-0544

Delgado, Juan  
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Morrison, Janet  
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916-323-6045

Rodriguez, Ramona  
(Workforce Investment Act Title II grant program)  
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916-319-0706

Roman, John  
(Budgets and Contracts)  
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916-323-5047
Appendix D. Adult Education Programs of Excellence

Each year, the California Department of Education (CDE) identified Adult Education Programs of Excellence. Programs that earn the designation of Programs of Excellence are characterized by the outstanding services they provide to adult learners—services that are both innovative and exemplary. In reviewing the practices, processes, and structures of Programs of Excellence, other adult education agencies may find ideas that can be incorporated into their own programs.

CALPRO manages the Programs of Excellence application and site review processes for the CDE. Award-winning programs must complete a rigorous certification process. They each must convene a body of diverse stakeholders within their local community to complete a self-assessment and review of their program along the following five dimensions: curriculum and instruction, learner support services, leadership and planning, learner accomplishment, and community involvement and collaboration. They then submit a written application in which they document evidence of exemplary practices that meet rigorous criteria. A team of adult education administrators and teachers form across the state reviews the applications in a double-blind review process using a scoring rubric. Those programs that qualify during the application review phase then host a team of visiting adult educators, led by CDE consultants. The purpose of the site visit is to verify that the exemplary program components documented in the application are, in fact, an integral part of the program’s functioning.

The following pages contain a listing of award-winning programs for each year, from the most current awards in 2004 to awards made during the program initial year (1998). There is no listing for 2001, the year the Programs of Excellence application was not available and no awards were made. For information about the exemplary practices of these programs, contact the program administrators.
Programs of Excellence Recipients

2005–2006
Charles A. Jones Skills & Business Education Center  Vocational Education
(re-certification)
Eureka Adult School  English as a Second Language
Hacienda La Puente Adult Education  Vocational Education
Metropolitan Adult Education Program  Adult Basic Education
Stockton School for Adults  English as a Second Language
(re-certification)

2004–2005
A. Warren McClaskey Adult Center  Adults with Disabilities
(re-certification)
Baldwin Park Adult and Community Education  Adult Basic Education
(re-certification)
Baldwin Park Adult and Community Education  English as a Second Language
(re-certification)
Baldwin Park Adult and Community Education  Older Adults (re-certification)
Baldwin Park Adult and Community Education  Vocational Education
(re-certification)
California Correctional Institution, Tehachapi  Adult Basic Education
Metropolitan Adult Education Program  Health and Safety
Sacramento City Unified School District  English as a Second Language

2003–2004
California Medical Facility  Adults with Disabilities
Foothills Adult Education Center  Parent Education
Santa Clara Adult Education  Health and Safety

2002–2003
Charles A. Jones Skills & Business Education Center  Vocational Education
Hacienda La Puente Adult Education  Parent Education
Metropolitan Adult Education Program  Older Adults
Santa Clara Adult Education  Adults with Disabilities
Santa Clara Adult Education  Parent Education
Santa Clara Adult Education  Vocational Education
Santa Clara Adult Education  English as a Second Language
Stockton School for Adults  Adults with Disabilities
Substance Abuse Treatment Facility and State Prison at Corcoran  English as a Second Language
Sweetwater Unified High School District  English as a Second Language

2001–2002
A. Warren McClaskey Adult Center  Adults with Disabilities
(re-certification)
A. Warren McClaskey Adult Center  Parent Education
Baldwin Park Adult and Community Education  Adult Basic Education
(re-certification)
Baldwin Park Adult and Community Education  English as a Second Language
(re-certification)
## Programs of Excellence Recipients

### 2001–2002 (cont.)

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<thead>
<tr>
<th>School</th>
<th>Program</th>
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<tbody>
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<td>Baldwin Park Adult and Community Education</td>
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<tr>
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<td>Fresno Adult School</td>
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<td>San Juan Unified School District</td>
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<td>Ventura Adult &amp; Continuing Education</td>
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### 1999–2000

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<td>Older Adults</td>
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<td>Hayward Adult School</td>
<td>Older Adults (re-certification)</td>
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<tr>
<td>Napa Valley Adult School</td>
<td>English as a Second Language (re-certification)</td>
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<tr>
<td>San Bernardino Adult School</td>
<td>English as a Second Language</td>
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<tr>
<td>South Bay Adult School</td>
<td>Parent Education (re-certification)</td>
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### 1998–1999

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<td>Baldwin Park Adult and Continuing Education</td>
<td>Adult Basic Education</td>
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<td>Burbank Adult School</td>
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<td>East Side Adult Education</td>
<td>Older Adults</td>
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<td>East Side Adult Education</td>
<td>Vocational Education</td>
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<td>Fairfield-Suisun Adult School</td>
<td>Vocational Education</td>
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<td>Garfield Community Adult School</td>
<td>Family Literacy</td>
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<tr>
<td>Grossmont Adult Education</td>
<td>Parent Education</td>
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<tr>
<td>Hacienda La Puente Adult Education</td>
<td>Adults with Disabilities</td>
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<tr>
<td>Hacienda La Puente Adult Education</td>
<td>Distance Learning</td>
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<tr>
<td>LAUSD, Division of Adult and Career Education</td>
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<td>Napa Valley Adult School</td>
<td>Citizenship</td>
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<tr>
<td>Sacramento Skills and Business Education Center</td>
<td>Vocational Education</td>
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<tr>
<td>Salinas Adult School</td>
<td>Parent Education</td>
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<tr>
<td>Santa Clara Adult Education</td>
<td>Adults with Disabilities</td>
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<td>Santa Clara Adult Education</td>
<td>English as a Second Language</td>
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<tr>
<td>Santa Clara Adult Education</td>
<td>Family Literacy</td>
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<tr>
<td>Simi Valley Adult School and Career Institute</td>
<td>Vocational Education</td>
</tr>
<tr>
<td>Winterstein Adult Center</td>
<td>Distance Learning</td>
</tr>
</tbody>
</table>
Programs of Excellence Recipients

1997–1998
Baldwin Park Adult and Community Education Language
Baldwin Park Adult and Community Education Vocational Education
East Side Adult Education Adult Basic Education
Hayward Adult School Older Adults
Long Beach School for Adults Adult Basic Education
Long Beach School for Adults High School Diploma
Napa Valley Adult School English as a Second Language
Saddleback Valley Unified School District Adult Basic Education
Salinas Adult School English as a Second Language
South Bay Adult School Parent Education
Sweetwater Adult and Continuing Education Citizenship
Appendix E. Promising Practices for California ABE/ESL Programs

In conjunction with the WIA Title II program evaluation process, CASAS staff review survey responses and focus group notes to document practices that reflect effective, innovative, creative activities that go beyond the basics. Other means to identify possible promising practices are site visits, listservs, and nomination by CDE consultants, CASAS staff, as well as self-nomination. Current guidelines and criteria for selection of promising practices are based on recommendations for the Field Evaluation Design team in 1999-2000.

To receive recognition as a Promising Practice, the practice must have potential application in other adult programs and address at least one of the following:

- improve program accountability
- focus on development of skills needed in the workplace
- promote collaboration/cooperation with other programs or agencies
- promote the effective use of technology

There are more than 41 promising practices in the following categories:

- Accountability
- Action Research
- Curriculum/Instruction
- ESL-Citizenship
- Family Literacy
- Guidance
- Program Management
- Technology/Distance Learning
- Vocational ESL

### Appendix F. Alphabet Soup for Adult Education

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full Form</th>
</tr>
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<tbody>
<tr>
<td>AAACE</td>
<td>American Association for Adult and Continuing Education</td>
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<tr>
<td>AB</td>
<td>Advisory Board</td>
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<tr>
<td>ABE</td>
<td>Adult Basic Education</td>
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<td>ACE</td>
<td>Adult and Continuing Education</td>
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<td>ACSA</td>
<td>Association of California School Administrators</td>
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<td>ACT</td>
<td>Adult Career Training Center</td>
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<tr>
<td>ADA</td>
<td>Average Daily Attendance; Americans with Disabilities Act</td>
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<td>AE</td>
<td>Adult Education</td>
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<td>Adult Education Act</td>
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<td>AEC</td>
<td>Adult Education Center</td>
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<td>AEFLA</td>
<td>Adult Education and Family Literacy Act</td>
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<td>ALIT</td>
<td>Adult Literacy Instructors' Training</td>
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<td>ALRI</td>
<td>Adult Literacy Resource Institute</td>
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<td>ALTN</td>
<td>Adult Literacy and Technology Network</td>
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<td>ANPN</td>
<td>Adult Numeracy Practitioners' Network</td>
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<td>APL</td>
<td>Adult Performance Level</td>
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<td>ASAP</td>
<td>Adult School Administration Program</td>
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<td>ASE</td>
<td>Adult Secondary Education</td>
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<tr>
<td>Bb</td>
<td>Blackboard, Inc.</td>
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<td>BEST</td>
<td>Basic English Skills Test</td>
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<td>BTSA</td>
<td>Beginning Teacher Support and Assessment</td>
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<td>CAEAA</td>
<td>California Adult Education Administrators Association</td>
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<td>CAHSEE</td>
<td>California High School Exit Exam</td>
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<td>CAL</td>
<td>Center for Applied Linguistics</td>
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<td>CALL</td>
<td>Computer-Assisted Language Learning</td>
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<td>CALPRO</td>
<td>California Adult Literacy Professional Development Project</td>
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<td>CalWORKs</td>
<td>California Work Opportunity and Responsibility to Kids</td>
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<td>CASAS</td>
<td>Comprehensive Adult Student Assessment System</td>
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<td>CATESOL</td>
<td>California Teachers of English to Speakers of Other Languages</td>
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<td>CBET</td>
<td>Community-based English Tutoring Program</td>
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<td>CBO</td>
<td>Community-based Organization</td>
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<tr>
<td>CCAE</td>
<td>California Council for Adult Education</td>
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<td>CCIS</td>
<td>California Consortium for Independent Study</td>
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<tr>
<td>CCR</td>
<td>Coordinated Compliance Review</td>
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<td>CDE</td>
<td>California Department of Education</td>
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<td>CDLP</td>
<td>California Distance Learning Project</td>
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<td>CEA</td>
<td>Correctional Education Association</td>
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<td>Continuous Improvement Measure</td>
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<td>Citizen Interview Test</td>
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<tr>
<td>COABE</td>
<td>Commission on Adult Basic Education</td>
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</table>
Alphabet Soup for Adult Education (Cont.)

COE  County Office of Education  
CSEA  Classified School Employees Association  
CTAP  California Technology Assistance Project  
CTAP  California Teachers Association  
CTC  Commission on Teacher Credentialing; Community Technology Center  
DAEL  Division of Adult Education and Literacy (U.S. Dept. of Ed)  
ECS  External Diploma Program  
EDP  Employability Competency System  
EFF  Equipped for the Future  
EL Civics  English Literacy and Civics Education  
ERIC  Education Resources Information Center  
ERIC  Educational Resources Information Center  
ESL  English as a Second Language  
ESLI  ESL Teacher Institute  
ESOL  English for Speakers of Other Languages  
FTE  Full-Time Equivalent  
GED  General Educational Development  
HSS  High School Skills  
IDEA  Individuals with Disabilities Education Act  
IEP  Individual Education Plan  
IHE  Institute of Higher Education  
INS  Immigration and Naturalization Service  
IPP  Individual Program Plan  
JIT  Just-in-Time Leadership  
JTPA  Job Training Partnership Act  
LD  Learning Disability(ies)  
LEA  Local Educational Agency  
LINCS  Literacy Information and Communication System  
LOI  Letter of Inquiry  
LVA  Literacy Volunteers of America  
MOU  Memorandum of Understanding  
NAAL (2004)  National Assessment of Adult Literacy  
NAASLN  National Association for Adults with Special Learning Needs  
NAEPDC  National Adult Education Professional Development Consortium  
NALD  National Adult Literacy Database (Canada)  
NALS (1992)  National Adult Literacy Survey  
NAULC  National Association of Urban Literacy Coalitions  
NCAL  National Center on Adult Literacy  
NCFL  National Center for Family Literacy  
NCLB  No Child Left Behind
### Alphabet Soup for Adult Education (Cont.)

<table>
<thead>
<tr>
<th>Acronym</th>
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<td>NCLD</td>
<td>National Center for Learning Disabilities</td>
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<td>NCLE</td>
<td>National Clearinghouse for ESL Literacy Education</td>
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<tr>
<td>NCSALL</td>
<td>National Center for the Study of Adult Learning and Literacy</td>
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<td>NCTE</td>
<td>National Council of Teachers of English</td>
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<td>NCTM</td>
<td>National Council of Teachers of Mathematics</td>
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<td>NGO</td>
<td>Non-governmental Organization</td>
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<td>National Institute for Literacy</td>
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<td>National Institute for Health</td>
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<td>NRS</td>
<td>National Reporting System</td>
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<td>ODC</td>
<td>Other Direct Costs</td>
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<tr>
<td>OMI</td>
<td>Organizing and Monitoring Instruction</td>
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<tr>
<td>OTAN</td>
<td>Outreach and Technical Assistance Network</td>
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<tr>
<td>OVAE</td>
<td>Office of Vocational and Adult Education (US Dept of Ed)</td>
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<tr>
<td>PAB</td>
<td>Professional Advisory Board</td>
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<td>PD</td>
<td>Professional Development</td>
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<tr>
<td>PDC</td>
<td>Professional Development Center</td>
</tr>
<tr>
<td>PDRN</td>
<td>Practitioner Dissemination and Research Network (NCSALL)</td>
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<tr>
<td>PIC</td>
<td>Private Industry Council</td>
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<tr>
<td>PLA</td>
<td>Participatory Learning Activities</td>
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<tr>
<td>R2P</td>
<td>Research to Practice</td>
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<tr>
<td>RFA</td>
<td>Request for Application</td>
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<td>Request for Proposals</td>
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<td>RFQ</td>
<td>Request for Quotation</td>
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<tr>
<td>ROCP</td>
<td>Regional Occupational Centers and Program</td>
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<td>ROP</td>
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<td>RRC</td>
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<td>SALS</td>
<td>State Adult Literacy Survey</td>
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<td>SCALE</td>
<td>Student Coalition for Action in Literacy Education</td>
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<td>SCANS</td>
<td>Secretary's Commission on Achieving Necessary Skills</td>
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<td>SDI</td>
<td>Staff Development Institute</td>
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<td>SEA</td>
<td>State Education Agency</td>
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<td>SLRC</td>
<td>State Literacy Resource Center</td>
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<tr>
<td>SOD</td>
<td>Student Outcome Dataset</td>
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<td>TABE</td>
<td>Tests of Adult Basic Education</td>
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<tr>
<td>TANF</td>
<td>Temporary Assistance for Needy Families</td>
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<td>TESOL</td>
<td>Teachers of English to Speakers of Other Languages</td>
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<td>TOEFL</td>
<td>Test of English as a Foreign Language</td>
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<td>TOPSpro</td>
<td>Tracking of Programs and Students</td>
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<td>ToT</td>
<td>Training-of-Trainers</td>
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<tr>
<td>UFW</td>
<td>United Farm Workers</td>
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<td>USD</td>
<td>Unified School District</td>
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## Alphabet Soup for Adult Education (Cont.)

<table>
<thead>
<tr>
<th>Abbreviation</th>
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<tbody>
<tr>
<td>VABE</td>
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<td>VESL</td>
<td>Vocational English as a Second Language</td>
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<td>WASC</td>
<td>Western Association of Schools and Colleges</td>
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<td>WIA</td>
<td>Workforce Investment Act</td>
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<td>Workforce Learning System</td>
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<td>WRAT</td>
<td>Wide-Range Achievement Test</td>
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Appendix G. CALPRO Professional Development Centers

For future planning, please disregard any references to CALPRO regional Professional Development Centers (PDCs), which closed their doors on 6/30/08, as a result of budget restrictions.