

Client Name: MOUNTAIN VIEW-WHISMAN SD  
Client # 15750/S10

P.O. # \_\_\_\_\_

**AGREEMENT FOR SPECIAL SERVICES**  
Fiscal and Management Information Services

This is an Agreement between the **CLIENT**, as defined above, and **SCHOOL SERVICES OF CALIFORNIA INC.**, hereinafter referred to as “Consultant,” entered into as of July 1, 2024.

**RECITALS**

**WHEREAS**, the Client needs assistance regarding issues of school finance, legislation, school budgeting, general fiscal issues, and the state-mandated program cost claims process; and

**WHEREAS**, the Consultant is professionally and specially trained and competent to provide these services; and

**WHEREAS**, the authority for entering into this Agreement is contained in Section 53060 of the Government Code and such other provisions of California law as may be applicable;

**NOW, THEREFORE**, the parties to this Agreement do hereby mutually agree as follows:

1. The Consultant agrees to perform such duties relating to issues of school finance, including:
  - a. Electronic delivery of the *Fiscal Report* containing information on issues of school finance, budgets, or practices and policy issues that impact local educational agency fiscal and education policies.
  - b. An analysis of all major school legislation affecting public education and information related to their progress through the California State Legislature and implementing state agencies, if applicable.
  - c. Participation at the Consultant’s school finance conferences and workshops at the Consultant’s client rate.
  - d. Up to 12 hours of service annually as the Client directs on fiscal issues, including analysis of specific local educational agency revenue or expenditure issues, analysis of specific legislative or regulatory issues, and a “quick query” service to provide telephone response to specific fiscal questions of the Client.


Services for which the base service hours may not be used include Client-specific economy, efficiency, or management consulting services, executive searches, legislative representation or advocacy; appearance as an expert witness; provision of depositions or declarations for local educational agency legal issues; major customized research projects or studies; or on-site speeches or presentations.

2. If the Client is a county office of education, the county office of education agrees that any information received from the Consultant shall be for the use of the county office of education only and shall not be provided by the county office of education to local educational agencies over 500 average daily attendance (ADA). Local educational agencies under 500 ADA are eligible to receive service as deemed appropriate by the county office of education.
3. The Client agrees to pay to the Consultant for services rendered under this Agreement:
  - a. \$ 4,680 annually, plus expenses, for the services listed in Item 1 above, upon receipt of billing from the Consultant.
  - b. For all requested services in excess of 12 direct service hours as indicated in Item 1d above in the 12-month period, the applicable hourly rate for the person(s) performing the services shall apply.
  - c. “Hours” are defined as hours of direct service to the Client, as well as reasonable travel time to and from the Client’s site.
  - d. “Expenses” are defined as actual, out-of-pocket expenses, such as travel, meals, shipping, and duplication of materials.
4. This Agreement shall be for the period of one year, beginning July 1, 2024, and terminating June 30, 2025. This Agreement may be terminated prior to June 30, 2025, by either party on 30 days’ written notice. In the event that the Client elects to terminate services at the end of the Agreement, the Client shall give a 30-day written notice of nonrenewal. The Consultant will provide continuing services for 90 days after the expiration date of the Agreement or until the Client provides written notice. The Client is responsible for these accrued charges and the Consultant may bill these additional days. In the case of cancellation, the Client shall be liable for any costs accrued to the date of cancellation under Item 3 above.

5. It is expressly understood and agreed to by both parties that the Consultant, while carrying out and complying with any of the terms and conditions of this Agreement, is an independent contractor and is not an employee of the Client.

**IN WITNESS WHEREOF**, the parties have caused this Agreement to be executed as indicated below:

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Rebecca Westover  
Chief Business Officer  
MOUNTAIN VIEW-WHISMAN SD

By:  \_\_\_\_\_ Date: 5/10/2024  
John D. Gray  
President/CEO  
School Services of California Inc.

Order CADIE/SABRE?: Yes  No

Contract period: \_\_\_\_\_ to \_\_\_\_\_

P.O. # \_\_\_\_\_

**ADDENDUM A  
TO SPECIAL SERVICES AGREEMENT**

As a client of School Services of California Inc., you have the option of purchasing either or both of our **CADIE** and **SABRE** reports at the client rate. The following information describes the **CADIE** and **SABRE** reports, and the form at the bottom of the page to order the reports.

The **Comparative Analysis of District Income and Expenditures (CADIE)** is a comprehensive computer-generated report comparing your district’s revenues and expenditures to those of 40 other districts (two reports with 20 districts in each) of your choice throughout the state. Well over 300 comparisons are made using SACS, CBEDS, and CALPADS data.

The **CADIE** includes comparative graphic data expenditures by ADA, tabular information showing per ADA and percentage distribution of district revenues and expenditures, staffing levels, and tables that show—on an ADA and percentage basis—how your district spent its dollars for the prior three years. The report is comprehensive, yet easy to use.

The **Salary And Benefits Report (SABRE)** is generated from the CDE’s Certificated Teachers Salary and Benefit data (Form J-90) and provides up to 38 side-by-side comparisons of your district with those of 40 other districts (two reports with 20 districts in each) of your choice on certificated salaries, health and welfare benefits, and work days.

The **SABRE** includes ten graphical displays and 27 comparison tables with side-by-side analysis for certificated non-management. It also includes the actual salary and benefit schedules and other selected data important for compensation evaluation in an easy-to-read format.

The analytical uses of the **CADIE** and **SABRE** reports are unlimited. If these products are needed for negotiations, they may be fully reimbursable as part of your mandated cost claim if you have chosen to file mandate claims for this year.

**WITH REPORT PURCHASE, YOU ARE ENTITLED TO TWO CADIES AND TWO SABRES**

Please check the appropriate items below:  Current year 2022-23  Next year 2023-24\*\*

Electronic Version:

\_\_\_ CADIE only \$500  
\_\_\_ SABRE only \$350  
\_\_\_ CADIE & SABRE \$800

Hardcopy Version:

\_\_\_ CADIE only \$600  
\_\_\_ SABRE only \$450  
\_\_\_ CADIE & SABRE \$1000

Select either:

\_\_\_ Use the same districts as last year

OR two of the following:

- \_\_\_ Use districts of similar type and size
- \_\_\_ Use districts geographically close to mine
- \_\_\_ Use districts with similar unduplicated pupil percentage

Reports are a year behind as the data is released by the CDE.

\*\*Next year: SABRE will be released in December 2024, CADIE will be released in March 2025

District Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Address (no P.O. boxes please): \_\_\_\_\_

Telephone with extension: \_\_\_\_\_

Email Address: \_\_\_\_\_

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

By completing this Addendum A, and submitting with the contract, the Client agrees to pay for these reports upon receipt of the products and appropriate billing.