

CAEP Allocation Amendment: 2020-21 Produced: May 29, 2020, 09:20 PM UTC Patricia Romo

## 62 South Orange County Regional Consortium (SOCRC)

### Allocation Amendment Summary

#### Fiscal Declaration

The Fiscal Declaration information in this section has been provided as a courtesy. It has not been changed since CFAD has been approved by the Member Representatives.

**Consortium Name:** 62 South Orange County Regional Consortium (SOCRC)

**Funding Channel:** Fiscal Agent

**Fiscal Agent:** Not Selected

**Narrative:** The SOCRC has taken a strategic alignment approach to spending planned allocations that is consistent with both our annual and three-year plans. Specifically, based upon our Mission and Vision Statements, the SOCRC members have created overarching goals, objectives and action steps that are directly linked to our resource allocations. Monthly member report-outs guarantee that we are all updated and aware of the spend downs by our individual members. Requests for large capital outlay amounts are required to be presented to all SOCRC members for review and approval. Any site that is having delays in spending allocated funds will report these delays and reasons at quarterly meetings. Our objectives and action steps are further tied to individual key performance indicators for the SOCRC. We have a bi-annual review of expenditures and open discussions pertaining to the return on investment of the funds. We continually remind our SOCRC members of the allowable and unallowable spending parameters prescribed by the California Adult Education Program. We will develop an orientation process for new members, including information on spending guidelines. We often consult CAEP personnel to ensure that we are in alignment with our resource allocation and regularly attend the technical CAEP webinars, reporting back to our consortium members. SOCRC will hire an outside auditing firm to conduct a yearly financial audit as well.

**Changes:** No Changes

### Amended Member Allocations for 2020-21

Member Agency	Amended Allocation	Adjustment Made
Capistrano Unified	\$0	
Coastline ROP	\$0	
College and Career Advantage	\$348,628	-\$48,016
Irvine Unified	\$387,371	-\$53,352
Irvine Valley College	\$412,178	-\$56,768
Laguna Beach Unified	\$88,835	-\$12,235
Orange County Department of Education	\$0	
Saddleback College	\$2,179,062	-\$300,117
Saddleback Valley Unified	\$0	
South Orange County CCD	\$221,727	-\$30,539
Tustin Unified	\$796,741	-\$109,734
<b>Total Allocated to Members</b>	<b>\$4,434,542</b>	
<b>Total CAEP Funds</b>	<b>\$4,434,542</b>	
<b>Total Remaining (Must be \$0)</b>	<b>\$0</b>	

## Member Agencies

Member Agency	Member Type	Contact	Phone
<a href="#">Capistrano Unified</a>	Unified School District	Meg Ervais	(949) 489-7216
<a href="#">Irvine Unified</a>	Unified School District	Dr. Rebecca Roberts	(949) 936-7405
<a href="#">Irvine Valley College</a>	College	Debbie Vanschoelandt	(949) 367-8310
<a href="#">Laguna Beach Unified</a>	Unified School District	Chad Mabery Ed. D.	(949) 497-7700
<a href="#">Saddleback College</a>	College	Karima Feldhus	
<a href="#">Saddleback Valley Unified</a>	Unified School District	David Gordon	(949) 589-7456
<a href="#">South Orange County CCD</a>	District	Kim McCord	(949) 582-4843
<a href="#">Tustin Unified</a>	Unified School District	Christine Matos	(714) 730-7395
<a href="#">Coastline ROP</a>	Regional Occupation Center/Program (ROC/P)	Carol Hume	(714) 429-2222
<a href="#">College and Career Advantage</a>	Regional Occupation Center/Program (ROC/P)	Patricia Romo	(949) 234-9464
<a href="#">Orange County Department of Education</a>	County Office of Education (COE)	Fatinah Judeh	(714) 349-3073

## Certification & Assurances



By clicking "Approve" on the approval cards below, you are certifying the CFAD as well as confirming that you and ALL consortium members agree to the Assurances listed below.

### Assurances

#### Membership & Decision-Making

- I certify that any community college district, school district, or county office of education, or any joint powers authority consisting of community college districts, school districts, county offices of education, or a combination of these, located within the boundaries of the adult education region shall be permitted to join the consortium as a member (EC 84905 (a) (b)). (See Membership Box above).
- I certify that only members as described above (and in EC 84905) are allowed to join my consortium as members and participate in decision making and approvals whether in a public meeting, or via the NOVA planning, budgeting & expense reporting system.
- I certify that as a condition of joining a consortium, as a member, I shall commit to reporting any funds (as described in EC 84916) available to that member for the purposes of education and workforce services for adults and the uses of those funds through the annual Program Area exercise in NOVA for reporting leveraged funds, and instructional hours.
- I certify that as a member of the consortium my district shall be represented only by an official designated by the governing board of the member (EC 84905 (c)).
- I certify that as a member of the consortium, I shall participate in any decision made by the consortium (EC 84905 (d)(1)(A)).
- I certify that all decision made by the consortium and its members is final (EC 84905 (d)(1)(F)).

- I certify that I will adhere to the consortium rules and procedures and, as agreed upon by the consortium members, to any additional by-laws, charters, etc.

## Public Meetings

- I certify that a proposed decision is considered at an open, properly noticed public meeting of the consortium at which members of the public may comment (EC 84905 (d)(1)(B)).
- I certify that the consortium has provided the public with adequate notice of a proposed decision and considered any comments submitted by members of the public, and any comments submitted by members of the public have been distributed publicly (EC 84905 (d)(1)(C)).
- I certify that the consortium has requested comments regarding a proposed decision from other entities located in the adult education region that provide education and workforce services for adults (EC 84905 (d)(1)(D)).
- I certify that the consortium has requested comments regarding a proposed decision from other entities located in the adult education region that provide education and workforce services for adults (EC 84905 (d)(1)(D)(i)).
- I certify that the consortium has considered input provided by pupils, teachers employed by local educational agencies, community college faculty, principals, administrators, classified staff, and the local bargaining units of the school districts and community college districts before it makes a decision (EC 84905 (d)(1)(E)).
- I certify that in addition to the meeting requirements listed in EC 84905, and as agreed upon by the consortium members, that I will follow the public meeting requirements listed in the Ralph M. Brown Act as the Brown Act applies to the governing body of any "local body created by state or federal statute." (Ed. Code, section 54952.)

## Reporting Requirements

- I certify that I will participate in completing and updating any consortium long range and/or short range planning efforts and/or budget work plans (EC 84906, 84914(a)).
- I certify that all CAEP expenses have been expended in the CAEP seven program areas, and services provided are consistent with the 3-year plan, the annual plan, and my district's work plan & budget as submitted in NOVA (EC 84913 (1-7), 84906, 8914(a)).
- I certify that my expenditures of CAEP funds match the objectives/activities included in the annual plan and the member work plan (EC 84906, 84914(a)).
- I certify that my expenditures of CAEP funds adhere to the allowable uses of funds as identified in the CAEP Fiscal Management Guide.
- I certify that I will report student level enrollment data and outcomes as prescribed by the State CAEP Office (EC 84920).
- I certify that I will share financial expenditure and progress reports with the members of my regional consortium.
- I certify that I understand that as a member if I do not meet any of these items I have certified, I will be deemed an ineffective member which may result in a loss or reduction of CAEP funding (EC 84914(b)).
- I certify that all CAEP expenses have been expended only for the education of persons 18 years of age or older (EC 84901(a)).

### South Orange County CCD - Member Representative

#### Kim McCord

Executive Director of Fiscal Services/Comptroller

[kmccord@socccd.edu](mailto:kmccord@socccd.edu)

(949) 582-4843

Approved by Kim McCord

05/26/2020 09:41 AM PDT

### Orange County Department of Education - Member Representative

**Fatinah Judeh**  
Coordinator  
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(714) 349-3073

Approved by Fatinah Judeh

05/26/2020 01:31 PM PDT

**Capistrano Unified - Member Representative**

**Meg Ervais**  
Principal  
[mervais@capousd.org](mailto:mervais@capousd.org)  
(949) 489-7216

Approved by Meg Ervais

05/26/2020 09:37 AM PDT

**Laguna Beach Unified - Member Representative**

**Chad Mabery**  
Director  
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Approved by Chad Mabery Ed. D.

05/27/2020 04:56 PM PDT

**Saddleback Valley Unified - Member Representative**

**David Gordon**  
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(949) 589-7456

Approved by David Gordon

05/26/2020 09:39 AM PDT

**Tustin Unified - Member Representative**

**Christine Matos**

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**William Neddersen**

Coordinator

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Approved by William Neddersen

05/26/2020 10:18 AM PDT

**Irvine Unified - Member Representative**

**Rebecca Roberts**

Director of Alternative Education

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(949) 936-7405

Approved by Dr. Rebecca Roberts

05/29/2020 10:34 AM PDT

**Coastline ROP - Member Representative**

**Carol Hume**

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Approved by Carol Hume

05/29/2020 01:15 PM PDT

**College and Career Advantage - Member Representative**

**Patricia Romo**

Executive Director

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Approved by Patricia Romo

05/29/2020 02:20 PM PDT

**Irvine Valley College - Member Representative**

**Debbie Vanschoelandt**

Dean, Career & Continuing Education, and Integrated Design, Engineering and Automation

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Approved by Debbie Vanschoelandt

05/26/2020 09:36 AM PDT

**Saddleback College - Member Representative**

**Karima Feldhus**

Assistant Vice President, Community Education, Emeritus Institute, and K-12 Partnerships

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Approved by Karima Feldhus

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