

Drowning in Documentation

Reporting Requirements for California LEAs

IMPACTS

California's nearly 1,000 local educational agencies serve more than 5.8 million public school students in grades TK-12. These LEAs face an ever-growing list of mandated state and federal reports, data submissions, and planning documents.

Although individual reports may not present an undue burden, **the cumulative impact draws resources away from critical tasks and responsibilities** of LEA staff, especially in California's smaller districts and county offices of education.



High price in time, human capital, cost and opportunity cost

- ▶ Administrators' planning and reporting efforts are so extensive that they cut into time available for instructional leadership, school improvement, school climate and other critical functions.



Ever-growing burden

- ▶ While new programs and mandates add to the long list of reporting requirements, state and federal government rarely phase out requirements, even when they become duplicative or are no longer actively reviewed by their respective agencies.



Too much data to digest

- ▶ Some districts, particularly smaller ones, lack the time and capacity to use the required data for their own purposes.
- ▶ State agencies often lack the staff capacity to analyze required plans, reports and data submissions or provide constructive feedback and technical assistance to LEAs.

Disproportionate burden for smaller districts



- ▶ Large districts might have dozens of staff to meet these requirements.
- ▶ Small to medium districts might have anywhere from a handful to more than a dozen staff available to complete reports, plans, and data submissions.
- ▶ Very small districts might rely on the superintendent, principal or superintendent/principal to meet these requirements, taking time away from their other administrative and educational leadership responsibilities.
- ▶ Alternatively, very small districts may have to hire outside consultants to do this work, consuming valuable resources that could be spent on student support and instruction.
- ▶ A significant amount of public funding is only available through discretionary grants that require additional time for applying, planning, reporting. Smaller and less-resourced districts often cannot take on this additional workload, creating opportunity gaps for students, staff and schools.

Required Plans and Reports

LEAs must submit plans and reports on a range of topics, including countless additional plans and reports for any discretionary grants and programs.

LEGEND: includes requirements originating at the

F federal level **S** state level **B** both state and federal level

CONTENT AREA	PLAN OR REPORT
<p>Accountability ONGOING</p> <p>Requires at least four plans, four annual reports and up to four additional plans for special circumstances.</p>	<ul style="list-style-type: none"> B Local Control and Accountability Plan (LCAP) B School Plan for Student Achievement B School Accountability Report Card F LCAP Federal Addendum F Local Education Agency Report Card S California School Dashboard — Local Indicators Report S Master Plan for the Education of English Learners
<p><i>Special accountability circumstances that require additional planning.</i></p>	<ul style="list-style-type: none"> F Comprehensive Support and Improvement F Targeted Support and Improvement F Additional Targeted Support and Improvement B Differentiated Assistance
<p>Safety and Transportation ONGOING</p> <p>Requires two plans, with updates as needed.</p>	<ul style="list-style-type: none"> S Home to School Transportation Plan S Comprehensive School Safety Plan (districts <2500 enrollment submit a district-level plan)
<p>State Block Grants and Special Funds</p> <p>Requires at least five plans, three annual reports, three interannual reports and one annual certification.</p>	<ul style="list-style-type: none"> S A-G Completion Improvement Grant Program Plan and Reports (two interannual reports) (thru 2026) S Arts, Music, and Instructional Materials Discretionary Block Grant Plan (2022–26) S Educator Effectiveness Fund Plan and Annual Reports (thru 2026) S Expanded Learning Opportunities Program Plan (2021–27) S Literacy Coaches and Reading Specialists Funds Annual Reports (thru 2027) S Proposition 28: Arts and Music in Schools Plan, Annual Reports, Annual Certifications, 3-year Expenditure Reports (ongoing)
<p>Special Education ONGOING</p> <p>Requires at least four plans, one annual report, ongoing maintenance of specified documents, and additional plans and reports for special circumstances.</p>	<ul style="list-style-type: none"> B Special Education Local Plan Area (SELPA) Local Plan F Local Assistance Entitlements for Special Education Annual Report F Mental Health ADA Allocation Plan and maintenance of documentation F Special Education Federal Preschool Grant Plan and maintenance of documentation F Compliance and Improvement Monitoring (CIM) Plan F Comprehensive Coordinated Early Intervening Services Plan and quarterly reports (for special circumstances: LEAs showing disproportionality) F Expenditure reports for various Special Education Grants, including: <ul style="list-style-type: none"> F Supporting Inclusive Practices Grant S Family Empowerment Centers
<p>Pandemic Recovery</p> <p>Requires at least two plans, six annual reports, 10 quarterly reports and one final report.</p>	<ul style="list-style-type: none"> F ESSER I Annual Report (thru 2024) F GEER Annual Report (thru 2024) F Homeless Children & Youth Fund II Quarterly and Annual Reports (thru 2025) F ESSER II Annual Reports (thru 2025) F ESSER III Quarterly & Annual Reports (thru 2026) F Special Education Federal Preschool Grant/ American Rescue Plan Act Plan and maintenance of documentation (thru 2026) S Learning Recovery Emergency Block Grant Annual Reports (thru 2029) S In-Person Instruction Grants Final Report (2024) B Expanded Learning Opportunities Grant Plan and Quarterly Expenditure Reports (thru 2026)
<p>Discretionary Grants</p> <p>Requires variable number of plans/reports, depending on what grants LEAs have received. Common examples are included to the right.</p>	<p>State examples:</p> <ul style="list-style-type: none"> S Career Technical Education (CTE) Incentive Grant Program Evaluation & Plan S California Community Schools Partnership Program Plan & Annual Reports S After School Education & Safety Quarterly, Semi-annual, and Annual Reports <p>Federal examples:</p> <ul style="list-style-type: none"> F 21st Century Community Learning Centers Quarterly, Semi-annual and Annual Reports F After School Safety & Enrichment for Teens Quarterly, Semi-annual, and Annual Reports F Perkins CTE Completer Survey

Required Data Submission or Compliance Activities

Additionally, LEAs must submit a range of data throughout the year. These data points reflect significant items that staff must submit on an ongoing basis.

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CONTENT AREA	DATA SUBMISSION / COMPLIANCE ACTIVITY
California Longitudinal Pupil Achievement Data System (CALPADS) ONGOING Requires two data submissions per year.	Student data: <ul style="list-style-type: none"> B Enrollment, course enrollment, program participation B Demographics B Behavior and discipline incidents B Absences B Graduates, completions, dropouts B Homeless, English learner, special education status and more
California Basic Educational Data System (CBEDS) ONGOING Requires annual data submission.	District- and school-level data: <ul style="list-style-type: none"> S Classified staff full time equivalency S Classified staff demographics S Estimated number of teacher hires S Work visa applications S Home-to-school transportation data S Kindergarten program type S School calendar information
California State Assignment Accountability System (CALSAAS) ONGOING Requires annual submission.	Teacher/staff data: <ul style="list-style-type: none"> B Full time equivalency B Demographics B Assignments B Courses taught
Standardized Account Code Structure System (SACS) ONGOING Requires three data submissions per year and annual audits by an independent auditor.	Financial reporting: <ul style="list-style-type: none"> S District budget S Interim and year-end reports on financial and budgetary status S District income and expenditures by source of funds S Audit data
Principal Apportionment Data Collection System ONGOING Requires three data submissions per year.	Data for calculating apportionments: <ul style="list-style-type: none"> S Attendance S Tax information S Some student data
Child Nutrition Information Payment System (CNIPS) ONGOING Requires ongoing data entry.	Participation and food counts for meal programs: <ul style="list-style-type: none"> B National School Lunch Program B School Breakfast Program B Meal Supplements/Snacks Program B Special Milk Program B Fresh Fruit and Vegetable Program B California Universal Meal Program
Consolidated Application and Reporting System (CARS) ONGOING Requires two submission cycles per year, plus expenditure reports on one- to two-year timelines.	For applying to and reporting participation in ESSA programs: <ul style="list-style-type: none"> F Title I, Part A F Title I, Part D, Subpart 2 F Title II, Part A, Supporting Effective Instruction F Title III, English Learner Student Subgrant F Title III, Immigrant Student Program F Title IV, Part A, Student Support and Academic Enrichment F Title V, Part B, Rural Education Achievement
Federal Program Monitoring Reviews ONGOING Requires intensive review about every four years, consuming a 60-day period prior to review.	Onsite and online legal compliance reviews for 19 federal programs, including: <ul style="list-style-type: none"> F Career Technical Education F Compensatory Education F Homeless Education F School Support and Improvement F Title III, Immigrant Student Program F Student Support and Academic Enrichment F Supporting Effective Instruction F Uniform Complaint Procedures and more
ESSA Per-Pupil Expenditures System ONGOING Requires annual data submission	<ul style="list-style-type: none"> F For reporting school-level expenditures by federal, state, local categories of funds.
Civil Rights Data Collection: School-Level Finance Survey ONGOING Requires annual data submission.	<ul style="list-style-type: none"> F For reporting more detailed data on school-level expenditures including on instruction, pupil support services, administration, salaries, books and more.
Federal Cash Management Data Collection ONGOING Requires quarterly data submissions.	<ul style="list-style-type: none"> F For reporting expenditures for formula-based federal programs



California School Boards Association
3251 Beacon Blvd., West Sacramento, CA 95691
(800) 266-3382 | www.csba.org