



December 7, 2017

Diann Kitamura, Superintendent  
Santa Rosa City Schools  
211 Ridgway Avenue  
Santa Rosa, CA 95401

Dear Superintendent Kitamura:

The Fiscal Crisis and Management Assistance Team (FCMAT) will conduct a review of Santa Rosa City Schools as a follow-up to our report of April 20, 2017. This letter contains information and details regarding the review, which will occur in spring 2018.

The April 2017 final report contained findings and recommendations in the following areas:

- Conduct an organizational and staffing review of the district's Business Services and Human Resources departments and provide recommendations for staffing improvements or reductions.
- Evaluate the current workflow and distribution of functions within and between the above departments, and provide recommendations for improved efficiency.
- Review operational processes and procedures for the Business Services department and provide recommendations for improved efficiency in the following areas:
  - Budget Development
  - Budget Monitoring
  - Accounts Payable
  - Accounts Receivable
  - Payroll
  - Position Control
- Review operational processes and procedures for the Human Resources Department and provide recommendations for improved efficiency in the following area:
  - Position Control

The purpose of FCMAT's follow-up review is to determine the status of the recommendations outlined in the report and determine whether they have been implemented. Although not all FCMAT reports result in a follow-up review, FCMAT does so at no charge upon request by the client within six months of the initial study. After the April 2017 report was published, the district made this request, and FCMAT agreed to give a status report in December 2017.

**FCMAT**

Michael H. Fine , Chief Executive Officer

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Administrative Agent: Mary C. Barlow - Office of Kern County Superintendent of Schools

On November 20, 2017, FCMAT met with the assistant superintendent of business services and assistant superintendent of human resources to review recommendation status. District staff has been assigned to follow up on each FCMAT recommendation, and progress has been tracked to date. Based on the meeting, the status is as follows:

In progress	29
Implemented	16
Under Review	6

FCMAT appreciates the update and information provided at the meeting. The district should be commended for its progress to date.

Because follow-up reviews normally occur at least one year after the initial report to allow adequate time for implementation, fieldwork has been scheduled for April 11 and 12, 2018.

On those dates, FCMAT requests that the district provide a workspace that will allow interviews and document review to be conducted confidentially while still providing relatively easy access to staff when additional documentation or assistance is needed. During fieldwork, FCMAT will conduct one-on-one interviews, data analysis, tests of records, and review of processes and procedures.

Although FCMAT will prepare a list of requested interviewees, all interviews are voluntary. If an individual is not included on the list, but would like a one-on-one interview, FCMAT will add him or her to the interview schedule.

FCMAT requests that the district provide any audits, reviews, other reports, or documentation that may assist us in understanding the district's actions and implementation of the recommendations to date. FCMAT also will send a request for specific documentation to review for each recommendation before April 2018.

After fieldwork, FCMAT will continue reviewing collected documents and may request additional information as necessary. Once this process is complete, a draft report will be issued to the Santa Rosa City Schools. The district should review this document, highlight any errors of fact and provide appropriate backup for any requested changes to the report. Once the district finishes this process, the report will be finalized and issued.

If you have any questions or require any clarification, please feel free to contact me. I look forward to working with you on this assignment.

Sincerely,



Michelle Giacomini

Chief Management Analyst