ITEM 17 ATTACHMENT 5

ITEM 8 ADDENDUM
Economic and Fiscal Impact Statement


Department Name: Education

Contact Person: Carolyn Nealon

Telephone Number: 916-319-0295

Descriptive Title From Notice Register Or From 400: Special Education (Version dated March 22, 2013)

Notice File Number: Z

Economic Impact Statement

Section A. ESTIMATED PRIVATE SECTOR COST IMPACTS (Include calculations and assumptions in the rulemaking record.)

Section A.1. Check the appropriate box(es) below to indicate whether this regulation:

- Selected option is H: None of the above (Explain below. Complete the Fiscal Impact Statement as appropriate)
- Option H explanation: The regulations would not impose any additional cost to the private sector.

Fiscal Impact Statement

Section A. FISCAL EFFECT ON LOCAL GOVERNMENT (Indicate appropriate boxes 1 through 6 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

- Selected option is 4: No additional costs or savings because this regulation makes only technical, non-substantive or clarifying changes to current law regulations.

Section B. FISCAL EFFECT ON STATE GOVERNMENT (Indicate appropriate boxes 1 through 4 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

- Selected option is 4: Other. No fiscal impact because this regulation makes only technical, non-substantive or clarifying changes to conform with current law.

Section C. FISCAL EFFECT ON FEDERAL FUNDING OF STATE PROGRAMS (Indicate appropriate boxes 1 through 4 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

- Selected option is 4: Other. No fiscal impact because this regulation makes only technical, non-substantive or clarifying changes to conform with current law.

Fiscal Officer Signature by Carolyn Nealon dated March 19, 2013

Agency Secretary Approval / Concurrence Signature by Jeannie Oropeza dated March 30, 2013

Department of Finance Approval / Concurrence Signature: No signature.

Questions: State Board of Education | 916-319-0827

Last Modified: Wednesday, May 01, 2013

California Department of Education
# Economic and Fiscal Impact Statement

**State of California — Department of Finance**

**Economic and Fiscal Impact Statement**

(Regulations and Orders)

See SAM Section 6601 - 6616 for Instructions and Code Citations

**Department Name:** Education

**Descriptive Title from Notice Register or Form 400:** Special Education (Version dated 3/22/13)

**Contact Person:** Carolyn Nealon  
**Telephone Number:** 916-319-0295

**Economic Impact Statement**

**A. Estimated Private Sector Cost Impacts**

1. Check the appropriate box(es) below to indicate whether this regulation:
   - Impacts businesses and/or employees
   - Impacts small businesses
   - Impacts jobs or occupations
   - Impacts California competitiveness
   - Imposes reporting requirements
   - Imposes prescriptive instead of performance
   - Impacts individuals
   - None of the above (Explain below. Complete the Fiscal Impact Statement as appropriate.)

   The regulations would not impose any additional cost to the private sector.

   (If any box in Items 1 a through g is checked, complete this Economic Impact Statement.)

2. Enter the total number of businesses impacted: ____________  
   Describe the types of businesses (Include nonprofits): ____________

   Enter the number or percentage of total businesses impacted that are small businesses: ____________

3. Enter the number of businesses that will be created: ____________  
   or eliminated: ____________  
   Describe the types of businesses (Including nonprolits): ____________

   Explain: ____________

4. Indicate the geographic extent of impacts:  
   - Statewide
   - Local or regional (List areas): ____________

5. Enter the number of jobs created: ____________  
   or eliminated: ____________  
   Describe the types of jobs or occupations impacted: ____________

6. Will the regulation affect the ability of California businesses to compete with other states by making it more costly to produce goods or services here?
   - Yes
   - No
   If yes, explain briefly: ____________

**B. Estimated Costs**

1. What are the total statewide dollar costs that businesses and individuals may incur to comply with this regulation over its lifetime? $ ____________
   - Initial costs for a small business: $ ____________  
     Annual ongoing costs: $ ____________  
     Years: ____________
   - Initial costs for a typical business: $ ____________  
     Annual ongoing costs: $ ____________  
     Years: ____________
   - Initial costs for an individual: $ ____________  
     Annual ongoing costs: $ ____________  
     Years: ____________
   - Describe other economic costs that may occur: ____________
ECONOMIC AND FISCAL IMPACT STATEMENT cont. (STD. 399, Rev. 12/2008)

2. If multiple industries are impacted, enter the share of total costs for each industry:


3. If the regulation imposes reporting requirements, enter the annual costs a typical business may incur to comply with these requirements. (Include the dollar costs to do programming, record keeping, reporting, and other paperwork, whether or not the paperwork must be submitted): $ __________

4. Will this regulation directly impact housing costs? [ ] Yes [ ] No If yes, enter the annual dollar cost per housing unit: _______ and the number of units: ________

5. Are there comparable Federal regulations? [ ] Yes [ ] No Explain the need for State regulation given the existence or absence of Federal regulations:

Enter any additional costs to businesses and/or individuals that may be due to State - Federal differences: $ __________

C. ESTIMATED BENEFITS (Estimation of the dollar value of benefits is not specifically required by rulemaking law, but encouraged.)

1. Briefly summarize the benefits that may result from this regulation and who will benefit:


2. Are the benefits the result of: [ ] specific statutory requirements, or [ ] goals developed by the agency based on broad statutory authority?

   Explain:

3. What are the total statewide benefits from this regulation over its lifetime? $ __________

D. ALTERNATIVES TO THE REGULATION (Include calculations and assumptions in the rulemaking record. Estimation of the dollar value of benefits is not specifically required by rulemaking law, but encouraged.)

1. List alternatives considered and describe them below. If no alternatives were considered, explain why not:


2. Summarize the total statewide costs and benefits from this regulation and each alternative considered:

   Regulation: Benefit: $ _______ Cost: $ _______
   Alternative 1: Benefit: $ _______ Cost: $ _______
   Alternative 2: Benefit: $ _______ Cost: $ _______

3. Briefly discuss any quantification issues that are relevant to a comparison of estimated costs and benefits for this regulation or alternatives:


4. Rulemaking law requires agencies to consider performance standards as an alternative, if a regulation mandates the use of specific technologies or equipment, or prescribes specific actions or procedures. Were performance standards considered to lower compliance costs? [ ] Yes [ ] No

   Explain: __________
1. Will the estimated costs of this regulation to California business enterprises exceed $10 million?  
   ☐ Yes  ☐ No (If No, skip the rest of this section.)

2. Briefly describe each equally as an effective alternative, or combination of alternatives, for which a cost-effectiveness analysis was performed:
   Alternative 1: ____________________________
   Alternative 2: ____________________________

3. For the regulation, and each alternative just described, enter the estimated total cost and overall cost-effectiveness ratio:
   Regulation:  $ ____________________________  Cost-effectiveness ratio: $ ____________________________
   Alternative 1:  $ ____________________________  Cost-effectiveness ratio: $ ____________________________
   Alternative 2:  $ ____________________________  Cost-effectiveness ratio: $ ____________________________

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FISCAL IMPACT STATEMENT

A. FISCAL EFFECT ON LOCAL GOVERNMENT (Indicate appropriate boxes 1 through 6 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

☐ 1. Additional expenditures of approximately $ ____________________________ in the current State Fiscal Year which are reimbursable by the State pursuant to Section 6 of Article XIII B of the California Constitution and Sections 17500 et seq. of the Government Code. Funding for this reimbursement:
   a. is provided in ____________________________, Budget Act of ____________________________, or Chapter ____________________________, Statutes of ____________________________
   b. will be requested in the ____________________________, Governor's Budget for appropriation in Budget Act of ____________________________, (FISCAL YEAR)

☐ 2. Additional expenditures of approximately $ ____________________________ in the current State Fiscal Year which are not reimbursable by the State pursuant to Section 6 of Article XIII B of the California Constitution and Sections 17500 et seq. of the Government Code because this regulation:
   a. implements the Federal mandate contained in ____________________________
   b. implements the court mandate set forth by the ____________________________
      court in the case of ____________________________, vs. ____________________________
   c. implements a mandate of the people of this State expressed in their approval of Proposition No. ____________________________ at the ____________________________, (DATE) election;
   d. is issued only in response to a specific request from the ____________________________, which is/are the only local entity(s) affected;
   e. will be fully financed from the ____________________________, (FEES, REVENUE, ETC.) authorized by Section ____________________________, Code;
   f. provides for savings to each affected unit of local government which will, at a minimum, offset any additional costs to each such unit;
   g. creates, eliminates, or changes the penalty for a new crime or infraction contained in ____________________________

☐ 3. Savings of approximately $ ____________________________ annually.

☐ 4. No additional costs or savings because this regulation makes only technical, non-substantive or clarifying changes to current law regulations.
ECONOMIC AND FISCAL IMPACT STATEMENT cont. (STD. 399, Rev. 12/2008)

☐ 5. No fiscal impact exists because this regulation does not affect any local entity or program.

☐ 6. Other.

B. FISCAL EFFECT ON STATE GOVERNMENT (Indicate appropriate boxes 1 through 4 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

☐ 1. Additional expenditures of approximately $______________ in the current State Fiscal Year. It is anticipated that State agencies will:
   a. be able to absorb these additional costs within their existing budgets and resources.
   b. request an increase in the currently authorized budget level for the __________________ fiscal year.

☐ 2. Savings of approximately $______________ in the current State Fiscal Year.

☐ 3. No fiscal impact exists because this regulation does not affect any State agency or program.

☑ 4. Other. No fiscal impact because this regulation makes only technical, non-substantive or clarifying changes to conform with current law.

[Signature and date]

FISCAL OFFICER/Signature

[Signature and date]

PROGRAM BUDGET MANAGER

[Signature and date]

1. The signature attests that the agency has completed the STD.399 according to the instructions in SAM sections 6601-6616, and understands the impacts of the proposed rulemaking. State boards, offices, or department not under an Agency Secretary must have the form signed by the highest ranking official in the organization.

2. Finance approval and signature is required when SAM sections 6601-6616 require completion of Fiscal Impact Statement in the STD.399.
ITEM ADDENDUM

DATE: April 29, 2013

TO: MEMBERS, State Board of Education

FROM: TOM TORLAKSON, State Superintendent of Public Instruction

SUBJECT: Item 8 – 2014 Mathematics Primary Adoption of Instructional Materials: Appointment of Instructional Materials Reviewers, Content Review Experts, and Non-Instructional Quality Commissioner Facilitators; Approval of Revision to the Schedule of Significant Events; Approval of Reviewer Training Materials; and Approval of Publisher Fee Reduction Request.

Summary of Key Issues

In January 2013 a recruitment letter from State Superintendent of Public Instruction Tom Torlakson was sent to district and county superintendents, curriculum coordinators in mathematics, and other interested individuals and organizations, to recruit mathematics educators to serve as Instructional Material Reviewers (IMRs) and Content Review Experts (CREs). Recruitment letters were also sent to college and university departments of mathematics, and to a number of professional associations related to mathematics. The application forms for the IMRs and CREs were posted on the CDE Web site through April 25, 2013.

On March 22, 2013, the Instructional Quality Commission (IQC) recommended the initial cohort of IMR and CRE applicants, received through March 8, 2013, to the State Board of Education (SBE). The IQC also delegated authority to their Mathematics Subject Matter Committee (SMC) to review and recommend any future applicants on behalf of the full commission. On April 19, 2013, the IQC Mathematics SMC recommended the second cohort of applicants, received between March 9, 2013, and April 15, 2013, for approval by the SBE. Those applicants were submitted to the SBE prior to this addendum.

On April 29, 2013, the IQC Mathematics SMC reviewed applications and recommended the final cohort of applicants, received between April 16, 2013, and April 25, 2013. This final cohort of applicants is listed below.

Profile of IMR and CRE Applicants

The role of the IMR is to review submitted programs to determine their alignment with the content standards and the evaluation criteria adopted by the SBE. The CRE members serve as mathematics content experts and confirm that the instructional materials are mathematically accurate and based on current and confirmed research.
A majority of the IMR applicants are classroom teachers, as required by the *California Code of Regulations*, Title 5, Article 2.1, Section 9516, but also include curriculum specialists, program coordinators, and consultants. All of the CRE applicants have an advanced degree in mathematics.

Of the 45 applications submitted in this final cohort, 7 of the applicants are male; 21 applicants are female; 17 applicants declined to state gender. Thirteen applicants are from northern California; 29 applicants are from southern California, and 3 are from central California.

This final cohort includes the following applicants:

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Full applications are available for viewing in the State Board of Education office.