

Budget & LCAP Development & Monitoring

Turlock Unified School District

LCAP Cohort: *Nino Amirfar (Community Member, Turlock Police Department), Domenic Bagnani (Custodian, Crowell), Marjorie Bettencourt (Asst. Superintendent, Finance & Accountability), Robert Brogdon (Network Supervisor, Technology), Michelle Cardoso (Teacher, Medeiros), Carol Coelho (Teacher, TJHS), Wendi Cook (Instructional Coach, Brown), Chrissy Coughran (Teacher, Walnut), Marilyn DeSousa (Teacher, DMS), Laura Fong (Director, Special Ed), Angie Freitas (Counselor, THS), Barney Gordon (Asst. Superintendent, Business Services), Teresa Harmon (Teacher, Osborn), Marcus Hatchell (Teacher, PHS), Ken Howenstine (Parent, Brown), Esmirna Imperial (Counselor, eCademy), Mary Jackson (Board of Trustees), Heidi Lawler (Asst. Superintendent, Ed Services), Doug McDonald (Teacher, Cunningham), Marya Moreno (Teacher, Crowell), Gabe Ontiveros (Principal, THS), Wendy Payne (Teacher, Julien), Jeff Persons (AP, Earl), Shellie Santos (Director, Curriculum & Instruction), Alice Solis (Director, ELASP), Diane Springer (Administrative Secretary, Osborn), Dana Trevethan (Superintendent), Tami Truax (Director, CTE & Program Equity)*

Budget Development: *Marjorie Bettencourt (Asst. Superintendent, Finance & Accountability), Pam McDiffett (Comptroller), Aaron Curd (Budget Analyst), Sandra Magana (Budget Analyst), Dawn Nelson (District Accounting Technician), Karyn Childers (District Accounting Technician)*

July, 2019			
Stakeholder(s)	Purpose/Venue	Tasks/Actions	Timeline
District Engagement	District-wide	Began implementing actions of LCAP District-wide.	July 1
District Administration Engagement	SSC workshop	Participated in the 2018 School Finance & Management conference to receive current information on the State adopted budget.	July 9
Finance Department	Department Meeting	Met to discuss timeline and procedures to close 2018-17 fiscal year.	July 10
Fiscal Department	Site Budgets	Reviewed site budgets and communication plan.	July 12
District/Site Administration Engagement	Site Budget / LCAP Roadshows	Scheduled individual meetings for each site and District administration regarding LCAP integrity and fiscal responsibility.	July 15-31
August, 2019			
Stakeholder(s)	Purpose/Venue	Tasks/Actions	Timeline
District Administration Engagement	Administrative Workshop	Reviewed 2019-20 LCAP focus/District initiatives with District Administration.	August 1
District Administration Engagement	Small Cabinet	Dedicated 30 minutes to monitor and evaluate progress on LCAP action items.	August 5, 12, 19, 26
District/Site Administration Engagement	Site Budget / LCAP Roadshows	Scheduled individual meetings for each site and District administration regarding LCAP integrity and fiscal responsibility.	August 1-16
Staff/Administration Engagement	New Teacher Orientation	Reviewed 2018-19 LCAP Goals, key actions, and development process.	August 7
District Administration Engagement	LCAP PLN meeting/SCOE	Participated in LCAP Professional Learning Network meeting at SCOE.	August 30
September, 2019			
Stakeholder(s)	Purpose/Venue	Tasks/Actions	Timeline
Fiscal Services Staff	Unaudited Actuals	Presented 2018-19 Unaudited Actuals on consent calendar for Board approval.	September 3
Fiscal Services Staff	Budgets	Updated budgets with carryover from 2018-19 to sites for SPSAs.	September
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	September 10

District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	September 10, 16, 23, 30
District/Site Administration Engagement	Secondary Principals Roundtable	Seek input from secondary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	September 16
Fiscal Services Staff	Year-end audit	Complete final site visit and data collection for 2018-19 Financial Audit report.	September 18-20
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	September 20
District/Site Administration Engagement	Elementary Principals Roundtable	Seek input from elementary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	September 23
Staff/Administration Engagement	Quarterly Classified Forum	Review LCAP goals & actions.	September 23
Staff/Administration Engagement	Quarterly Certificated Forum	Review LCAP goals & actions.	September 30

October, 2019

Stakeholder(s)	Purpose/Venue	Tasks/Actions	Timeline
District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	October 8, 14, 21, 28
Parent/Staff Administration Engagement	Superintendent's Parent Advisory Council	Provide LCAP progress update and review data to support action items at Parent Advisory Council.	October 3
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	October 4
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	October 8
District/Site Administration Engagement	Secondary Principals Roundtable	Seek input from secondary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	October 21
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	October 25
District/Site Administration Engagement	Elementary Principals Roundtable	Seek input from elementary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	October 28
Staff/Administration Engagement	Quarterly Certificated Forum	Review LCAP goals & actions.	October 29
Fiscal Services Staff	1 st Interim	Finalize budget updates for 1 st interim reporting.	October 31

November, 2019

Stakeholder(s)	Purpose/Venue	Tasks/Actions	Timeline
Fiscal Services Staff	SELPA Regionalized Program Fees	Update fees for service for regionalized programs to align with individual program costs.	November 1
Staff/Administration Engagement	Quarterly Classified Forum	Review LCAP goals & actions.	November 4
District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	November 4, 12, 18, 25
Parent/Staff Administration Engagement	Superintendent's Parent Advisory Council	Provide LCAP progress update and review data to support action items at Parent Advisory Council.	November 7
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	November 12
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	November 15

Governing Board, Staff/Community Engagement	LCAP Steering Committee Meeting	Hold initial meeting for LCAP Steering Committee members to discuss LCAP process, and review goals, identified needs, and District data.	November 15
District/Site Administration Engagement	Secondary Principals Roundtable	Seek input from elementary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	November 18
District/Site Administration Engagement	Elementary Principals Roundtable	Seek input from secondary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	November 19
December, 2019			
Stakeholder(s)	Purpose/Venue	Tasks/Actions	Timeline
Staff/Community Engagement	Electronic Communication to 56-member LCAP Steering Committee	Communicate progress on LCAP development and data to all 56 members of the LCAP Steering Committee.	December 2
District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	December 2, 10, 16, 23, 30
Governing Board, Staff/Community Engagement	Board Meeting	Present 1 st Interim report and budget revisions to Board for approval.	December 3
Governing Board, Staff/Community Engagement	Board Meeting	Provide LCAP progress update.	December 3
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	December 10
District Administration Engagement	Charter Oversight	Review Fusion Charter financial statements & 1 st interim report.	December 11
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	December 13
January, 2020			
District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	January 6, 14, 21, 27
District/Site Administration Engagement	Elementary Principals Roundtable	Seek input from elementary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	January 6
Staff/Admin/Community Engagement	Online	Begin LCAP Survey Process to receive feedback from staff, students, parents and community members.	January 7
Parent/Staff Administration Engagement	Superintendent's Parent Advisory	Seek input/feedback regarding LCAP development process.	January 9
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	January 10
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	January 14
District/Site Administration Engagement	Secondary Principals Roundtable	Seek input from secondary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	January 13
Staff/Administration Engagement	Quarterly Certificated Forum	Review LCAP goals & actions.	January 16
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	January 24

Staff/Administration Engagement	Quarterly Classified Forum	Review LCAP goals & actions.	January 28
February, 2020			
District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	February 3, 11, 18, 24
District/Site Administration Engagement	Elementary Principals Roundtable	Seek input from elementary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	February 3
Parent/Staff Administration Engagement	Superintendent's Parent Advisory	Seek input/feedback regarding LCAP development process.	February 6
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	February 7
District/Site Administration Engagement	Secondary Principals Roundtable	Seek input from secondary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	February 10
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	February 11
Staff/Community Engagement	Electronic Communication to 56-member LCAP Steering Committee	Communicate LCAP progress, to include new actions and related data, to all 56 members of the LCAP Steering Committee.	February 12
Governing Board, Staff/Community Engagement	Board Meeting	LCAP progress update to be provided.	February 18
Governing Board, Staff/Community Engagement	LCAP Steering Cohort Meeting	Hold second meeting to discuss LCAP process and review actions & data.	February 21
March, 2020			
District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	March 2, 10, 16, 23, 30
Parent/Staff Administration Engagement	Superintendent's Parent Advisory	Seek input/feedback regarding LCAP development process.	March 5
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	March 10
Community Engagement	DELAC Parent Advisory Meeting	Share LCAP progress & collect input.	March 12
Governing Board, Staff/Community Engagement	LCAP Steering Cohort Meeting	Hold third meeting to discuss LCAP process and review actions & data; Collect high priority actions & feedback/input.	March 13
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	March 13
Community Engagement	LCAP Community Forum	Present 1-hour overview on LCFF & LCAP allowing for discussion & input related to prioritizing the State's eight areas to plan for 2020-21, with emphasis on eligible students.	March 18
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	March 27
District/Site Administration Engagement	Secondary Principals Roundtable	Seek input from secondary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	March 16

District/Site Administration Engagement	Elementary Principals Roundtable	Seek input from elementary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	March 23
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	March 27
April, 2020			
District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	April 6, 13, 21, 27
Parent/Staff Administration Engagement	Superintendent's Parent Advisory	Seek input/feedback regarding LCAP development process.	April 2
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	April 21
Governing Board, Staff/Community Engagement	LCAP Steering Cohort Meeting	Hold fourth meeting to discuss LCAP process and review actions & data; collect feedback/input.	April 3
District/Site Administration Engagement	Secondary Principals Roundtable	Seek input from secondary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	April 20
Governing Board, Staff/Community Engagement	Board Meeting	LCAP progress update to be provided.	April 21
Staff/Administration Engagement	Quarterly Certificated Forum	Review LCAP goals & actions.	April 27
District/Site Administration Engagement	Elementary Principals Roundtable	Seek input from elementary site principals regarding evidence, effectiveness, & engagement of LCAP goals/actions.	April 28
Staff/Administration Engagement	Quarterly Classified Forum	Review LCAP goals & actions.	April 28
May, 2020			
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	May 1
District Administration Engagement	Small Cabinet	Dedicate 30 minutes to monitor and evaluate progress on LCAP action items.	May 4, 11, 19, 26
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	May 15
Governing Board, Staff/Community Engagement	LCAP Steering Cohort Meeting	Hold fifth meeting to discuss LCAP process and review actions & data; Review final draft.	May 8
District Administration Engagement	Large Cabinet	Review department timelines to support LCAP actions/progress.	May 19
District Administration Engagement	LCAP PLN meeting/SCOE	Participate in LCAP Professional Learning Network meeting at SCOE.	May 29
June, 2020			
Governing Board, Staff/Community Engagement	Board Meeting	Present 2020-21 Tentative Budget and conduct a Public Hearing on LCAP & Budget.	June 2
Governing Board Engagement	Board Meeting	Present 2020-2021 LCAP & Budget for adoption.	June 16
County Office Engagement	Email Correspondence	Send TUSD LCAP to SCOE for approval.	June 18