

984-1 Bostwick Lane
Santa Cruz, CA 95062

January 24, 2025

Dear Budget Advisory Committee:

The Live Oak School District (LOSD) Budget Advisory Committee will have their first Budget Advisory Committee meeting on **November 6, 2024 from 6:00 - 8:00 p.m.**, all meetings will be held on Zoom. We would love for you to attend this meeting and provide your unique perspective on the budget and assist us with recommendations to the superintendent for consideration by our board of education. The meeting schedule is as follows:

Budget Advisory Committee Meeting Calendar
(Day/Date/Time)

Wednesday November 6, 2024 6:00-8:00 p.m.

Zoom Link: <https://us02web.zoom.us/j/86366860129?pwd=COIbArjEISadZPbtg4EsjbnjyNEbul.1>

Wednesday November 20, 2024 6:00-8:00 p.m.

Zoom Link: <https://us02web.zoom.us/j/86366860129?pwd=COIbArjEISadZPbtg4EsjbnjyNEbul.1>

Wednesday December 4, 2024 6:00-8:00 p.m.

Zoom Link: <https://us02web.zoom.us/j/86366860129?pwd=COIbArjEISadZPbtg4EsjbnjyNEbul.1>

Monday January 27, 2025 6:00-8:00 p.m.

Zoom Link: <https://us02web.zoom.us/j/86366860129?pwd=COIbArjEISadZPbtg4EsjbnjyNEbul.1>

Wednesday March 5, 2024, 2024 6:00-8:00 p.m.

Zoom Link: <https://us02web.zoom.us/j/86366860129?pwd=COIbArjEISadZPbtg4EsjbnjyNEbul.1>

In addition to working very collaboratively with our County Office of Education LOSD has also been working with Ryland Strategic Business Consulting, a very reputable and well respected financial assistance organization. This organization has an outstanding record of integrity and is also respected by FCMAT and SCCOE.

Bio about our Budget Advisory Committee facilitator:

Lindsay “Kate” Lane

Kate is a licensed CPA working as an independent consultant to school agencies after retiring as the Deputy Superintendent for Marin County Office of Education. In total, Kate spent 17 years working for County Offices of Education including Tehama and Mendocino with her work focused heavily on AB1200 and support to school districts. During her tenure, Kate was a very active member of the County Superintendents’ Business and Administrative Services Committee taking a lead role in the development of the LCFF Calculator, serving as the representative to the audit advisory committee, co-chairing the Pensions committee and chairing the professional development committee. Prior to her time in County Offices of Education, Kate worked for six years as an independent auditor serving primarily school agencies. Kate’s earlier career in accounting was spent with Indian Tribal Government and non-profit organizations. Kate was born in the United Kingdom but has lived in Northern California for over 40 years. Kate has degrees in business administration from the Union Institute and management from Phoenix University and has maintained an active CPA license since 2006.

Please RSVP to mcoffman@losd.ca or call 831-475-6333 ext.231

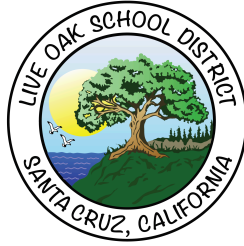
Sincerely,



Kristin Pfothenhauer
LOSD Governing Board President



Pat Sánchez
LOSD Superintendent



BUDGET ADVISORY COMMITTEE (BAC) Purpose, Roles and Responsibilities

The Live Oak School District Governing Board and Superintendent Pat Sánchez would like to personally invite you to volunteer to be a part of the District Budget Advisory Committee.

I. Purpose

To advise the **Superintendent** in budget planning, development, reductions and implementation matters for **recommendations** to the Board of Trustees.

II. Membership

The Budget Advisory Committee (BAC) shall be composed of the following members:

A. Parents and School/Community Members

1. Five parents representing each school's communities, plus two more from any site (7 total)
2. Two members representing the business community
3. LOETA President and Vice-President, or 2 Designee(s)
4. CSEA President and Vice-President, or 2 Designee(s)

B. Administrators

1. Superintendent
2. HR Representative
3. Fiscal Services
4. Director of Special Education
5. Director of Educational Services
6. Five Principals/Vice Principals, (or designee) representing each of the schools

C. Board Members

1. One Board Member representing the Board
2. One Alternate Board Member (to attend in the absence of Board representative)

III. Operation

- A. The BAC shall be formed and hold its first meeting at the start of the budget process for the following school year.
- B. The CBO shall act as Chairperson for the Team.
Any team member who fails to attend two consecutive meetings without advance notice shall be replaced by another appointed member at the discretion of the team.

IV. Duties

To advise and make recommendations to the Superintendent concerning priority of budget requests from all educational and support entities within the school district. The team shall determine its own mode of operation necessary to conduct its meetings and gather information pertinent to effective decision making. During periods when budget reductions must be made, the BAC shall identify and prioritize proposed reductions and reinstatements for recommendation to the Superintendent. When funds are available, the BAC shall recommend the funding priorities of new programs to the Superintendent. The Superintendent will make recommendations to the Board and clearly share the advice given by the BAC.

V. Meetings

The BAC shall meet at the discretion of the Chairperson and the Team Members.

VI. Program Presentations

When necessary, program administrators/leaders will be called upon to speak to specific programs in order for the BAC to make fully informed recommendations. The Superintendent may choose to be present during all or certain meetings or discussions in order to establish or communicate District goals and objectives.

A. Parents and School/Community Members

- 1. Five parents representing each school's communities
 - a. **LO - Sebastian Lacey (630) 536-6272, lacetytaxservices@gmail.com**
 - b. **DM -Chloe Marin (917) 474-0064, chloe.marin@gmail.com**
 - c. **GA - Brooke Bond (831) 566-0832, brookeabond7@gmail.com**
 - d. **SH -Shanna Urbancic, shannaurbancic@gmail.com**
 - e. **OA - Beth Hernandez-Jason (831) 419-2180, hernandez.beth@gmail.com**
 - f. **GA -Veronique Marks, artsnowlosd@gmail.com**

