

PASADENA UNIFIED SCHOOL DISTRICT

PLANNING TIMELINE – 8.25.16 (revised)

Month	Planning Context	LCAP/BUDGET	Planning – LCAP/Site/Dept	Stakeholder engagement
<b>August</b>	<ul style="list-style-type: none"> <li>Start tracking budget assumptions – update each month as changes become known</li> </ul>			
<b>September</b>	<ul style="list-style-type: none"> <li>Carryover rules set for year</li> <li>Review spending trends</li> <li>Finalize all major school/program changes as well as enrollment and transportation policy changes.</li> </ul>	<ul style="list-style-type: none"> <li>Present Annual Update – with final expenditures, student data and reflections – to Board</li> </ul>	<ul style="list-style-type: none"> <li>Needs Assessment – collect data, format into reports, start analysis</li> </ul>	<ul style="list-style-type: none"> <li>Present data reports to stakeholders</li> </ul>
<b>October</b>	<ul style="list-style-type: none"> <li>Capture current year enrollment</li> <li>Review changes to funding streams for following year and impact of expiring grants</li> <li>Conduct compensation study</li> </ul>		<ul style="list-style-type: none"> <li>Needs Assessment – continue data analysis – start root cause analysis</li> </ul>	<ul style="list-style-type: none"> <li>Present data analysis to stakeholders</li> </ul>
<b>November</b>	<ul style="list-style-type: none"> <li>Review/revise base staffing model</li> <li>Finalize corrected current year enrollment</li> <li>Do enrollment projections</li> <li>Complete analysis of compensation study and set targets</li> </ul>	<ul style="list-style-type: none"> <li>Using needs assessment findings, review/revise goals, outcomes, metrics and targets (Board with staff input)</li> </ul>	<ul style="list-style-type: none"> <li>Needs Assessment – continue root cause analysis, develop list of needs – present to Board</li> </ul>	<ul style="list-style-type: none"> <li>Present root cause/list of needs to stakeholders</li> </ul>
<b>December</b>	<ul style="list-style-type: none"> <li>Do staffing projections Initial site allocations communicated to schools</li> <li>Communicate allocations to departments</li> <li>1<sup>st</sup> Interim Budget and Audit due December 15</li> <li>Present compensation information related to bargaining to Board</li> <li>Labor Negotiations<sup>1</sup></li> </ul>	<ul style="list-style-type: none"> <li>Begin developing strategies based on needs and revised goals/outcomes/ metrics and targets and preliminary budget projections</li> </ul>	<ul style="list-style-type: none"> <li>Begin developing strategies based on needs and revised goals/outcomes/ metrics and targets and preliminary budget projections</li> </ul>	

<sup>1</sup> Timeframe to be determined (per August 25, 2016 Board meeting)

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January	<ul style="list-style-type: none"> <li>Get January budget from State - incorporate into multi-year projections</li> </ul>	<ul style="list-style-type: none"> <li>Revise above as needed</li> </ul>	<ul style="list-style-type: none"> <li>Revise above as needed</li> </ul>	
February	<ul style="list-style-type: none"> <li>Develop staffing plans – increases and reductions</li> </ul>	<ul style="list-style-type: none"> <li>Publish initial list of strategies developed</li> </ul>	<ul style="list-style-type: none"> <li>Publish initial list of strategies developed</li> </ul>	<ul style="list-style-type: none"> <li>Get stakeholder feedback on initial list of strategies</li> </ul>
March	<ul style="list-style-type: none"> <li>Conclude labor negotiations<sup>2</sup></li> <li>Present revised multi-year projections with 2nd Interim</li> </ul>	<ul style="list-style-type: none"> <li>Revise list of strategies – based on feedback and budget projections</li> </ul>	<ul style="list-style-type: none"> <li>Revise list of strategies – based on feedback and budget projections</li> </ul>	
April		<ul style="list-style-type: none"> <li>Publish draft LCAP</li> </ul>	<ul style="list-style-type: none"> <li>Share draft Dept/Site plans</li> </ul>	<ul style="list-style-type: none"> <li>Community and official PAC feedback gathered and responded to.</li> </ul>
May	<ul style="list-style-type: none"> <li>Final decisions on staff reductions (May 15th)</li> <li>May Revise – incorporate into multi-year projections</li> </ul>	<ul style="list-style-type: none"> <li>Incorporate budget projection/stakeholder feedback changes into LCAP draft</li> </ul>	<ul style="list-style-type: none"> <li>Incorporate budget projection changes into Dept and site plans</li> <li>Approve site plans at sites and then board</li> </ul>	
June		<ul style="list-style-type: none"> <li>Have public hearings for budget and LCAP</li> <li>Approve LCAP and Budget</li> </ul>		

<sup>2</sup> If no agreement is reached relative to compensation during labor negotiations, how the district incorporates its proposed compensation should be consider in the subsequent year's budget, even if it is not settled.