

APPENDIX X - 1

2021-22 USP BUDGET DEVELOPMENT PROCESS

Date(s)	Action
Oct – Dec 2020	The District shall initiate: assessments of 910G requirements for sites and departments; assessments of 910G capital needs.
October 23	The District shall provide a draft budget development process to the Special Master, budget expert, and plaintiffs for review.
December 4, 2020	Winter budget meeting: parties shall discuss the proposed USP budget, including budget priorities, draft templates, formulas, expectations, and other key budget-related issues.
December 11, 2020	The plaintiffs shall submit comments or suggestions for the draft budget development process no later than five (5) business days after the budget discussion.
December 18, 2020	The District will finalize the draft budget development process and submit to Special Master and plaintiffs. The District shall provide the plaintiffs, special master and budget expert with all District formulas used or required in the allocation of funds (noting changes from previous year), including ELD FTE and Teacher Assistant formulas and/or standards, school level staffing/FTE formulas, and CRC Itinerant-Teacher ratios. The District shall initiate and finalize the enrollment projections that will be used to develop 910G allocations and share the projections with the Special Master and plaintiffs.
No later than February 8, 2021	The District shall schedule a collaborative meeting of the parties to review and discuss the proposed budget and other budget-related issues in May 2021 between the submission of Draft #2 and the Final Draft.
DRAFT #1 NARRATIVE [No later than March 15, 2021]	District submits Draft #1 narratives, including: USP Budget Criteria Forms for proposed new or expanded programs and Student Support Forms for proposed new or expanded student support programs (any systematic evaluation of new or expanded programs should be attached); and all Magnet Site Plans (with budgets). The narrative shall include a framework for proposed reductions.
March 16, 2021	Budget Expert will confirm and note that the above information has been received by all. Lack of information provided will be noted. Due one business day after receipt of the Draft #1 Narrative.
March 19, 2021	The District shall file with the Court a Notice of Disclosure and/or Compliance (including, if applicable, an explanation of any failures to comply with the March 1, 2021 benchmark)
March 29, 2021	Plaintiffs and Special Master submit comments on Draft #1 no later than 10 business days after Draft #1 is received.

Date(s)	Action
<p>DRAFT #2 includes Narrative related to issues raised by the Special Master and Plaintiffs, and funding from all sources in Form 4(b))</p> <p>[No later than May 3, 2021]</p>	<p>District submits Draft #2 including funding from all sources in Form 4(b) (all changes between drafts emphasized); the 2019-20 Proposed USP Budget Draft #2 will include:</p> <ul style="list-style-type: none"> • a rationale for any differences between Draft #2 and the 2020-21 USP Budget , including a rationale for any non-incremental increase or decrease between drafts, if applicable [Cover Letter] • a summary of the Draft #2 proposed aggregated allocations broken out by allocation from 910G and all other USP related funding sources, by activity with the 2021-22 Proposed Allocation [Form 1-A], the 2021-22 Allocation [Form 1-B], and the variance between the Draft #2 2021-22 proposed allocation and the 2020-21 allocation [Form 1-C] • Draft #2 proposed allocation for the activity in the proposed budget year (2021-22), • the current budget year (2020-21), and the previous budget year (2019-20) [Form 2] • Actual expenditures for each activity for the previous budget year (2019-20), allocations and projections for each activity for the current budget year (2020-21), proposed allocations for each activity for the proposed budget year (2021-22) [Form 5] • 910G budget detail, including Draft #3 proposed 2021-22 allocations, current year (2020-21) budgeted allocations, and comments relating to any position and/or program changes [Form 3] and specific line item allocations by department [Form 4(a)] • the USP Funding Criteria and/or Student Support Criteria forms shall be provided for each new or expanded program in Draft #2 of the budget that was not delineated in Draft the Draft #1 narrative • PD assessment (participants, amounts, delivery methods, costs) <p>NOTE: The allocations for each activity that were approved for the 2020-21 school year should not be moved to another activity for the 2021-22 school year budget year. Changes in allocations within an activity from the previous year will be completed and approved through the reallocation process after the budget is approved.</p> <p>All Magnet Site Plans shall be submitted separately, including the general M&O budget allocations, and specific 910(G) and Title I budget allocation. If any change in excess of \$50,000 is thereafter made to the proposed allocation for any magnet school, the District will expressly include notice and an explanation of the change in its Draft #2 submissions or in its Final Budget filing, whichever is most timely.</p>
May 7, 2021	Budget Expert in consultation with SM will confirm and note that the above information has been received by all. Completed and/or lack of information provided will be noted.
No later than May 7, 2021	The District shall file with the Court a Notice of Disclosure and/or Compliance (including, if applicable, an explanation of any failures to comply with the May 3, 2021 benchmark)
May 2021	Spring budget meeting: the parties shall discuss the proposed USP budget and other related issues.
May 17, 2021	Plaintiffs and Special Master submit comments on Draft # 2 no later than 10 business days after Draft #2 is received

Date(s)	Action
[no later than 10 business days after Draft #2 is received]	
June 1, 2021 [within 10 business days of plaintiffs comments on Draft #2]	Special Master submits any suggestions for modification related to proposed allocations reflected in Draft #2 to the District.
June 8, 2021	<p>The plaintiffs submit any and all “continuing objections” and any objections or comments they have on the Special Master’s suggestions.</p> <p>If the District makes revisions to Draft #2, it will share those changes with the Special Master and plaintiffs for expedited review prior to presentation to the Governing Board. Comments will be due back to the District within five (5) business days.</p>
June 2021	Budget Expert in consultation with SM will confirm and note all RFI’s and Responses. Any continuing RFI’s will be noted.
FINAL DRAFT No later than June 22 or 29, 2021	District presents Final Proposed Budget to the Special Master and Plaintiffs and presents Final Proposed Budget, Special Master suggestions for modification, and Plaintiffs’ continuing objections to the Governing Board. The Final Proposed Budget will be in the approved format. The District provides a copy of the “Final Draft” 2021-22 Proposed USP Budget that will be considered by the Governing Board with any allocation revisions using the approved format. Any changes from Draft #2 and Draft #1 shall be noted in the same way as described in previous formats. If approved, the District will file the Final Budget no later than July 2, 2021.
June 24, 2021	Budget Expert in consultation with SM will confirm and note that the above information has been received by all. Completed and/or lack of information provided will be noted.
No later than 10 days after the filing of the Final Budget	Any plaintiff may file objections to the Final USP Budget.
No later than 10 days after plaintiffs’ objections	The District may file a response (which may include commitments to reallocate funds in response to objections).
No later than 10 days after the District response	Special Master may file an R&R.