

APPENDIX X – 14

MEMORANDUM

June 24, 2016

TO: TUSD Governing Board

FROM: TUSD Staff

RE: FY2016-17 USP Budget Process

This memorandum details the USP budget process followed by TUSD staff and counsel in developing the proposed budget submitted to you today, and provides all of the preliminary materials submitted to the Special Master and plaintiffs, and all written comments and suggestions received in response.

Based on the experience in prior years, the plaintiffs, TUSD's Chief Financial Officer and Finance Director, the Special Master, and the plaintiffs' budget operations expert worked out a detailed plan to allow input and comment on TUSD's proposed use of funds for desegregation activities in FY2016-17. Then, the District, Special Master, plaintiffs, and the plaintiffs' budget operations expert reviewed the draft process and forms and provided feedback. *See* Appendix 1, Transmittal Email re Draft Budget Process; *see also* Appendix 2, Transmittal Email re Draft Budget Forms; *and see* Appendix 3, Email re Mendoza response to draft forms. The process and forms were revised based on plaintiff feedback.

The final budget development process appears in the "Budget Development Process for - 2016-17" filed by the Special Master in March 2016 and was not objected to by any party. *See* Appendix 4 [ECF 1915]. In overview, the plan provided for three successive preliminary drafts, and an opportunity for the plaintiffs and Special Master to comment or object to each draft, over a period stretching back more than three months from today, and included a two-day, in-person budget summit meeting, held on April 20-21, 2016.

TUSD staff – including finance, the desegregation and legal departments, senior leadership and supporting staff – have worked very hard to make the process informative and meaningful to all the participants. The staff conservatively estimates that compliance with this budget process has taken over 2,000 staff-hours.

In January and February, TUSD staff worked to prepare an initial draft of the budget for FY2016-17 desegregation activities. On **March 9, 2016**, the first draft of the USP budget was provided to the plaintiffs and the Special Master, in a series of forms designed to capture the information requested by the Special Master's budget consultant Dr. Vicki Balentine (in both excel and pdf format), and which included detailed comparisons to prior years' budgets. *See* Appendix 5, Transmittal Email re Draft 1.

In response to the Mendoza feedback on the draft forms, and feedback received on Draft 1, on **April 4, 2016**, the District submitted a supplement to Draft 1 that included a written

description of changes between the 2015-16 USP Budget and Draft 1, a checklist identifying all required forms and information (including enhanced and additional forms), the rationale for funding for the Asian Pacific Islander and Refugee Student Services Department, budget criteria forms, and a student support criteria form for MTSS. *See* Appendix 6, Transmittal Email re Draft 1 Supplement. TUSD received comments from all parties on the Draft 1 Budget and Draft 1 supplemental materials (some in memorandum format, and some by e-mail).

TUSD staff considered the comments, and worked to prepare a second draft of the budget. This second draft was provided to the plaintiffs and the Special Master on **April 8, 2016**. The materials provided were again in a series of forms and formats as requested by Dr. Balentine (in both excel and pdf format), included additional budget criteria and student support criteria forms, contained a checklist outlining all of the required forms and information, and contained a description of major changes between Draft 1 and Draft 2. *See* Appendix 7, Transmittal Email re Draft 2.

Most of the comments on Draft 2 were discussed orally at the budget summit meeting on **April 20-21, 2016**. The budget summit also resulted in the preparation of some additional materials for submission with the third draft of the budget.

TUSD staff worked to consider, and, as deemed appropriate, to incorporate the comments and suggestions from the budget summit into the third draft of the USP budget. The third draft of the FY2016-2017 USP budget was submitted to the plaintiffs and the Special Master on **May 6, 2016**. *See* Appendix 8, Transmittal Email re Draft 3. Again, the materials were presented in a detailed set of forms and formats as requested by Dr. Balentine (in both excel and pdf format), and contained a checklist outlining all of the required forms and information. On **May 10, 2016**, the District submitted a supplement to Draft 3 that included a detailed, narrative description of the major programs funded, and a comparison of budgeted amounts to actual spending in prior years and a detailed narrative outlining the District's discipline-related allocations. *See* Appendix 9, Transmittal Email re Draft 3 Supplement. In addition, the District submitted all 19 magnet plans – including budgets – to the Special Master and Plaintiffs. *See* Appendix 10, Magnet Plans and Budget.

Comments on Draft 3 were due from plaintiffs on June 6, 2016, and from the Special Master on June 20, 2016. The District received comments on Draft 3 from the Mendoza plaintiffs and the Special Master.

Finally, after consideration of all of the comments and recommendations, District staff prepared the formal Proposed Budget, provided to you concurrently with this memorandum and its appendix.

Brown, Samuel

From: Willis D. Hawley <wdh@umd.edu>
Sent: Saturday, February 20, 2016 1:16 PM
To: Rubin Salter, Jr.; Juan Rodriguez; Thompson, Lois D.; shaheena simons (shaheena.simons@usdoj.gov); Eichner, James (CRT); Chanock, Alexander (CRT); Desegregation; TUSD (TUSD@rllaz.com); Converse, Bruce (BConverse@steptoe.com)
Cc: Vicki Balentine; amarks@markslawoffices.com
Subject: Budget Review Process
Attachments: USP Budget Reallocation Criteria 4.docx; Review of 2015-16 910G Budget Development Process-Final Draft.docx

Obviously the budget process has begun and we have not formalized the process. I am sorry about that but we have been back and forth with you and particularly the district. You will see two documents attached. One is the entire process with new dates and a new reallocation process. The reallocation process is in the overall policy but we wanted to explain the reason for this proposed elaboration. Could you let us know by February 26 if you have any objections?

Brown, Samuel

From: Taylor, Martha
Sent: Wednesday, March 02, 2016 9:14 AM
To: Balentine, Vicki Eileen - (vbalenti) (vbalenti@email.arizona.edu); Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley
Cc: Desegregation; Tolleson, Julie; Converse, Bruce (BConverse@steptoe.com); Charlton, Paul (pcharlton@steptoe.com); Soto, Karla; Weatherless, Renee
Subject: Budget Forms, Staffing Formulas, Projected Enrollment
Attachments: Form 1 - USP BUDGET SUMMARY.pdf; Form 2 - ACTIVITY SUMMARY.pdf; Form 3 - ACTIVITY AND SITE.pdf; Staffing Formulas FY2016-2017.pdf; TUSD FY2016-2017 Projected Enrollment.pdf; Form 4 - ACTIVITY AND SITE DETAIL.pdf

Dr. Hawley, Dr. Balentine and counsel: Attached please find the budget forms (four), staffing formulas, and projected enrollment information. Also included below is a summary explanation of these documents from our Finance Department. As you know, Draft 1 of the 2016-17 budget is due Wednesday, March 9.

Thank you.

These sample forms are based on what the budget draft 2 would look like when we start comparing the current draft to the prior draft of the budget.

HEADERS:

FY17 2.0 Amount	Fiscal Year 2016-2017 Draft 2.0 Dollar Amount
FY17 2.0 FTE	Fiscal Year 2016-2017 Draft 2.0 FTEs
FY16 Adjusted Budget Amount	Fiscal Year 2015-2016 Adjusted Budget Dollar Amount
FY16 Adj FTE	Fiscal Year 2015-2016 Adjusted FTEs
Year over Year Amount	Variance between the 2016-2017 Draft 2 and the 2015-2016 Adjusted Budget
Year over Year FTE	Variance between the 2016-2017 Draft 2 and the 2015-2016 Adjusted Budget
FY17 1.0 Amount	Fiscal Year 2016-2017 Draft 1.0 Dollar Amount
FY17 1.0 FTE	Fiscal Year 2016-2017 Draft 1.0 FTEs
2.0 v 1.0 Amount	Variance between the 2016-2017 Draft 2 and Draft 1
2.0 v 1.0 FTE	Variance between the 2016-2017 Draft 2 and Draft 1
Explanations Draft 2.0 vs Draft 1.0 draft	Explanation regarding the variance between the current draft and the prior draft

FORMS:

Form 1 – USP Budget Summary Code	Total UPS budget including 910(G) and non-910(G) funds reported by Activity Code
Form 2 – Activity Summary	Total 910(G) budget summarized by Activity Code
Form 3 – Activity and Site Code	Total 910(G) budget sorted by Activity Code and Site reported by Account Code
Form 4 – Activity and Site Detail	Total 910(G) budget sorted by Activity Code and Site reported by Account Code including detail such as job descriptions

Brown, Samuel

From: Juan Rodriguez <jrodriguez@MALDEF.org>
Sent: Tuesday, March 08, 2016 1:18 PM
To: Taylor, Martha; Balentine, Vicki Eileen - (vbalenti) (vbalenti@email.arizona.edu); Alexander Chanock; James Eichner; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley
Cc: Desegregation; Tolleson, Julie; Converse, Bruce (BConverse@steptoe.com); Charlton, Paul (pcharlton@steptoe.com); Soto, Karla; Weatherless, Renee
Subject: RE: Budget Forms, Staffing Formulas, Projected Enrollment

Dear Martha,

The Mendoza Plaintiffs have now had an opportunity to review the forms and formulas attached to your email below and have a few follow up questions and concerns. As an initial matter, under the February 20, 2016 Review of 2015-16 910G Budget Development Process, Strengths, Weaknesses and Recommendations for the 2016-17 910G Process ("Budget Process"), the District was to have provided "the Special Master with a budget format that includes the information delineated below *for all budget drafts.*" (Budget Process at 9 (emphasis added).) However, each of the forms attached to your email regard Draft #2 of the budget. Because the information required to be presented in the budget varies by draft, and we have identified issues with the Draft #2 budget forms, we think the District should provide the Special Master with each of the budget forms contemplated in the Budget Process, particularly as we believe that process will ensure that the District has thought through how it will present data. (However, because Draft #1 of the budget is to be provided tomorrow, on March 9, 2016, Mendoza Plaintiffs do not believe it necessary to provide such forms for Draft #1). Mendoza Plaintiffs also request that the Special Master review those budget forms to ensure that the format allows for the presentation of all the information contemplated under the Budget Process.

With regard to the Draft #2 forms, they do not include, for each activity, "the allocation for the activity in the current budget year (2015-16)" or "the variance between the Draft #2 and the Draft #1 2016-17 proposed allocation" "broken out by allocation from 910G and any other USP related funding sources." (Budget Process at 11.) Mendoza Plaintiffs therefore request that the District revise its forms to include this information or explain any issues it may be facing in presenting this information.

In addition, the staffing formulas provided do not include "all changes from 15-16 noted" as was contemplated in the Budget Process. (Budget Process at 9.) Mendoza Plaintiffs therefore request that the District detail any changes in staffing formulas from the 2015-16 school year (or indicate that there have been no changes). They also request that the parties be given the required ELD and teacher assistant formulas (Budget Process at 9), which they did not see reflected in the staffing formulas attached to your email. It also appears that the District may have inadvertently included a deseg formula for Learning Support Coordinators as the parties have agreed that the position will not be funded for the 2016-17 school year, and therefore request confirmation that the formula will not apply for the 2016-17 school year.

Mendoza Plaintiffs were confused by the fact that the M&O teacher to student ratios differ and appear to reflect larger class sizes than the ratios provided for Desegregation and Title 1 (which are identical to each other). Mendoza Plaintiffs are unclear on whether these formulas reflect that the District intends to fund the difference in class sizes reflected in the M&O formulas and the deseg/Title 1 formulas using deseg/Title 1 funds across all TUSD schools. They therefore request that the District explain why the M&O teacher to student ratios are different than those of deseg/Title 1.

Thanks,

Juan Rodriguez | Staff Attorney

MALDEF | www.maldef.org
634 South Spring Street, 11th Floor, Los Angeles, CA 90014
213.629.2512, ext. 136 t / 213.629.0266 f
jrodriguez@maldef.org

MALDEF: The Latino Legal Voice for Civil Rights in America.

CONFIDENTIALITY NOTICE: This e-mail transmission from The Mexican American Legal Defense & Educational Fund, and any documents, files or previous e-mail messages attached to it may contain confidential information that is legally privileged. If you are not the intended recipient, or a person responsible for delivering it to the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of any of the information contained in or attached to this transmission is strictly prohibited. If you have received this transmission in error, please immediately notify us by reply e-mail or by telephone at 213.629.2512, and destroy the original transmission and its attachments without reading or saving it in any manner.

From: Taylor, Martha [mailto:Martha.Taylor@tUSD1.org]
Sent: Wednesday, March 02, 2016 8:14 AM
To: Balentine, Vicki Eileen - (vbalenti) (vbalenti@email.arizona.edu); Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley
Cc: Desegregation; Tolleson, Julie; Converse, Bruce (BConverse@steptoe.com); Charlton, Paul (pcharlton@steptoe.com); Soto, Karla; Weatherless, Renee
Subject: Budget Forms, Staffing Formulas, Projected Enrollment

Dr. Hawley, Dr. Balentine and counsel: Attached please find the budget forms (four), staffing formulas, and projected enrollment information. Also included below is a summary explanation of these documents from our Finance Department. As you know, Draft 1 of the 2016-17 budget is due Wednesday, March 9.

Thank you.

These sample forms are based on what the budget draft 2 would look like when we start comparing the current draft to the prior draft of the budget.

HEADERS:

FY17 2.0 Amount	Fiscal Year 2016-2017 Draft 2.0 Dollar Amount
FY17 2.0 FTE	Fiscal Year 2016-2017 Draft 2.0 FTEs
FY16 Adjusted Budget Amount	Fiscal Year 2015-2016 Adjusted Budget Dollar Amount
FY16 Adj FTE	Fiscal Year 2015-2016 Adjusted FTEs
Year over Year Amount	Variance between the 2016-2017 Draft 2 and the 2015-2016 Adjusted Budget
Year over Year FTE	Variance between the 2016-2017 Draft 2 and the 2015-2016 Adjusted Budget
FY17 1.0 Amount	Fiscal Year 2016-2017 Draft 1.0 Dollar Amount
FY17 1.0 FTE	Fiscal Year 2016-2017 Draft 1.0 FTEs
2.0 v 1.0 Amount	Variance between the 2016-2017 Draft 2 and Draft 1
2.0 v 1.0 FTE	Variance between the 2016-2017 Draft 2 and Draft 1
Explanations Draft 2.0 vs Draft 1.0 draft	Explanation regarding the variance between the current draft and the prior draft

FORMS:

Form 1 – USP Budget Summary Code	Total UPS budget including 910(G) and non-910(G) funds reported by Activity Code
Form 2 – Activity Summary	Total 910(G) budget summarized by Activity Code
Form 3 – Activity and Site Code	Total 910(G) budget sorted by Activity Code and Site reported by Account Code
Form 4 – Activity and Site Detail	Total 910(G) budget sorted by Activity Code and Site reported by Account Code including detail such as job descriptions

**EXPECTATIONS FOR THE 910G
BUDGET DEVELOPMENT PROCESS FOR 2016-17**

The following schedule and budget information for the 910G Budget Development

Process for 2016-17 is delineated below.

Date(s)	Action
February 15, 2016	<p>The District shall provide the plaintiffs, Special Master and budget expert with all District formulas used or required in the allocation of funds (with all changes from 2015-16 noted), including ELD FTE and Teacher Assistant formulas, weighted student count, school level allocations, and FTE formulas.</p> <p>The District shall provide the Special Master with a budget format that includes the information delineated below for all budget drafts.</p>
No later than February 24, 2016	A meeting of the parties will be scheduled in Tucson between April 11 – April 22 to review and discuss the proposed budget and other issues.
<p>DRAFT #1</p> <p>March 9, 2016</p>	<p>The 2016-17 Budget Process shall formally initiate with the following information provided as the 2016-17 Proposed USP Budget Draft #1 format for each tracked activity:</p> <ul style="list-style-type: none"> • a summary of the Draft #1 proposed aggregated allocations by activity with the 2016-17 Proposed Allocation, the 2015-16 Allocation, and the variance between the two. <p style="text-align: center;"><u>For Each Activity</u></p> <ul style="list-style-type: none"> • Draft #1 proposed allocation for the activity in the proposed budget year (2016-17), broken out by allocation from 910G and any other USP related funding sources; • the allocation for the activity in the current budget year (2015-16), broken out by allocation from 910G and any other USP related funding sources; • the allocation for the activity in the last budget year (2014-15*), broken out by expenditure from 910G and any other USP related funding sources, where applicable; • the variance between the Draft #1 2016-17 proposed allocation and the 2015-16 allocation, broken out by allocation from 910G and any other USP-related funding sources, where applicable; • a rationale for any differences between the Draft #1 proposed 2016-17 and the 2015-16 allocated amounts, including a rationale for any non-incremental increase or decrease in funding for the activity during the current budget year (2015-16), if applicable; and • 910G budget detail, including specific line item allocations by department, with Draft #1 proposed 2016-17 allocations, current

**Appendix 4:
Final Budget Process [ECF 1915, pp. 8-11]**

Date(s)	Action
	year (2015-16) budgeted allocations, and comments relating to any position and/or program changes. <ul style="list-style-type: none"> • On a separate form, the USP Funding Criteria information shall be provided for each new or expanded program in Draft #1 of the budget. • All Student Support Forms shall be provided separately. Any systematic evaluation of the program should be attached.
March, 2016 (no later than 10 business days after Draft #1 is received)	Plaintiffs and Special Master review and comment period. A phone conference with the parties may prove supportive of the process during this time.
DRAFT #2 April 8, 2016	TUSD provides Draft #2 of the 2016-17 Proposed USP Budget with any allocation revisions using the Draft #2 format for each tracked activity: <ul style="list-style-type: none"> • a summary of the Draft #2 proposed aggregated allocations by activity with the 2016-17 Proposed Allocation, the 2015-16 Allocation, and the variance between the two. <p><u>For Each Activity</u></p> <ul style="list-style-type: none"> • Draft #2 proposed allocation for the activity in the proposed budget year (2016-17), broken out by allocation from 910G and any other USP-related funding sources; • the allocation for the activity in the current budget year (2015-16), broken out by allocation from 910G and any other USP-related funding sources; • the variance between the Draft #2 and the Draft #1 2016-17 proposed allocation, broken out by allocation from 910G and any other USP-related funding sources, where applicable; • a rationale for any differences between the Draft #1 and Draft #2 proposed allocations, including a rationale for any non-incremental increase or decrease in funding for the activity, if applicable; and • 910G budget detail, including specific line item allocations by department, with Draft #2 proposed 2016-17 allocations, Draft #1 proposed 2016-17 allocations, current year (2015-16) budgeted allocations, and comments relating to any position and/or program changes. • On a separate form, the USP Funding Criteria information shall be provided for each new or expanded program in Draft #2 of the budget.
March/April 2016 (no later than 10 business days after Draft #2 is received)	Plaintiffs and Special Master review and comment period limited to newly proposed allocations in Draft #2 except when new changes in proposed allocations affect specific proposals in Draft #1 or when a rationale is provided as to why the comment was not provided in Draft#1. The Plaintiffs and Special Master may also restate comments related to prior

**Appendix 4:
Final Budget Process [ECF 1915, pp. 8-11]**

Date(s)	Action
	drafts. A phone conference with the parties may prove supportive of the process during this time.
April 2016	The parties shall meet in Tucson to discuss the proposed USP budget and other issues between April 11 and April 22, 2016
DRAFT #3 May 11, 2016	TUSD provides Draft #3 of the 2016-17 Proposed USP Budget with any allocation revisions using the Draft #3 format for each tracked activity: <ul style="list-style-type: none"> • a summary of the Draft #3 proposed aggregated allocations by activity with the 2016-17 Proposed Allocation, the 2015-16 Allocation, and the variance between the two. <p style="text-align: center;"><u>For Each Activity</u></p> <ul style="list-style-type: none"> • Draft #3 proposed allocation for the activity in the proposed budget year (2016-17), broken out by allocation from 910G and any other USP-related funding sources; • Draft #2 proposed allocation for the activity in the proposed budget year (2016-17), broken out by allocation from 910G and any other USP-related funding sources; • Draft #1 proposed allocation for the activity in the proposed budget year (2016-17), broken out by allocation from 910G and any other-USP related funding sources; • the allocation for the activity in the current budget year (2015-16), broken out by allocation from 910G and any other USP-related funding sources; • the variance between the Draft #3 and the Draft #2 2016-17 proposed allocation, broken out by allocation from 910G and any other USP-related funding sources, where applicable; • a rationale for any differences between the Draft #3 and Draft #2 proposed allocations, including a rationale for any non-incremental increase or decrease in funding for the activity, if applicable; and • 910G budget detail, including specific line item allocations by department, with Draft #3 proposed 2016-17 allocations, Draft #2 proposed 2016-17 allocations, Draft #1 proposed 2016-17 allocations, current year (2015-16) budgeted allocations, and comments relating to any position and/or program changes. • On a separate form, the USP Funding Criteria information shall be provided for each new or expanded program in Draft #3 of the budget.
May 2016 (no later than 20 business days after Draft #3 is received, per USP Court Order)	Plaintiffs' review and comment period limited to newly proposed allocations in Draft #3 except when new changes in proposed allocations affect specific proposals in Draft #2 or when a rationale is provided as to why the comment was not provided in Draft#1. The Plaintiffs may also restate comments related to prior drafts. A phone conference with the

**Appendix 4:
Final Budget Process [ECF 1915, pp. 8-11]**

Date(s)	Action
	parties may prove supportive of the process during this time.
May 2016 (within 10 business days of plaintiffs comments on Draft #3, per USP Court Order)	Special Master submits any suggestions for modification related to proposed allocations reflected in Draft #3 to the District.
June 2016	TUSD provides a copy of the “Final Draft” – 2016-17 Proposed USP Budget that will be considered by the Governing Board with any allocation revisions using the Final Draft format for each tracked activity. Any changes from Draft #3 and other previous drafts shall be noted in the same way as described in previous formats. TUSD Governing Board action on the 2016-17 Proposed USP Budget. Any continuing objection by the plaintiffs shall be noted separately and provided to the Governing Board for consideration.
July 2016	Governing Board action on the 2016-17 USP Budget.
July 2016	Within ten (10) days of Governing Board action, if necessary, objections filed for any plaintiff disagreement with the budget, as approved. Any subsequent agreed upon changes will be addressed in the December, 2016 Budget Revision.

*2014-15 allocation determined through “Crosswalk.”

YEARLY REVIEW OF EXPENDITURES (AUDIT) OF 910G FUNDS

The Yearly Review of Expenditures (Audit) required by the USP shall report expenditures for each of the revised descriptions of activities in the Implementation Addendum as amended in November of 2014. For 2013-14, the audit shall focus only on the expenditure of 910G funds. Thereafter, the audit shall include expenditures for the entire USP budget, including the expenditure of related funds from non-910G sources.

The District should recode past budget information using the IA structure by activity for budget years 2013-14 (Original IA) and 2014-15 (Revised IA) to allow for an accurate and meaningful audit. If such recoding is difficult, at the very least, a crosswalk shall be developed and implemented by the District for prior years that shall allow for relevant and accurate auditing of 910G funds by activity for years 2013-14 and 2014-15. As a result, the Review of Expenditures for 2013-14 and 2014-15 will have “crosswalked” information which may not be

Brown, Samuel

From: Brown, Samuel
Sent: Wednesday, March 09, 2016 5:42 PM
To: Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Paul Charlton; Rubin Salter Jr.; Shaheena Simons (shaheena.simons@usdoj.gov); Willis D. Hawley
Cc: Tolleson, Julie; Bruce Converse (BConverse@steptoe.com); Taylor, Martha; Soto, Karla; Weatherless, Renee
Subject: TUSD 2016-17 USP Budget Draft 1.0
Attachments: Form 1 - USP Budget Summary Draft 1.0.pdf; Form 2 - Activity Summary Draft 1.0.pdf; Form 3 - Activity and Site Draft 1.0.pdf; Form 4 - Activity and Site Detail Draft 1.0.pdf; FY 2016-2017 Deseg Budget Draft 1 - FINAL.xlsx

Dr. Hawley/Counsel: on behalf of Martha Taylor, please find attached the 2016-17 USP Budget Draft 1 in both pdf and excel format. The PDF forms 1-4 represent the Excel tabs 1-4. Thanks, Sam

Brown, Samuel

From: Taylor, Martha
Sent: Monday, April 04, 2016 5:34 PM
To: Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley
Cc: Desegregation; Tolleson, Julie; Converse, Bruce (BConverse@steptoe.com); Soto, Karla; Weatherless, Renee
Subject: Deseg Budget 2016-17 Draft 1 supplement
Attachments: Rationale Draft 1-Final.docx; APIRSSD 2016-17 Budget Rationale.docx; ACT Engage budget criteria final.docx; Communicatons Budget Criteria Final.docx; Dual Language Budget Criteria final.docx; FACE Budget Criteria final.docx; GATE Budget Criteria final.docx; LabStats budget criteria final.docx; PBIS Budget Criteria final.docx; Transportation budget criteria final.docx; 00 MTSS Student Support Criteria Form.docx; Draft 1 Form 1A 040416.pdf; Draft 1 Form 1B 040416.pdf; Draft 1 Form 1C 040416.pdf; Draft 1 Form 2 040416.pdf; Draft 1 Form 3 040416.pdf; Draft 1 Form 4 040416.pdf; Draft 1 Form 5 040416.pdf; 20160404 Revised Draft 1.xlsx; INTRO 2016-17 Budget Process Drafts 1 SMP.pdf

Dr. Hawley and counsel: Please find attached the supplemental documents for draft 1 of the 2016-17 deseg budget. We have created an INTRO cover page that lists all draft 1 requirements for the budget process as filed in Dr. Hawley's March 29 report (ECF 1915), all of which we submitted either on March 9 or today. We will attach a similar Intro cover page with drafts 2 and 3. Attached separately are forms for the required budget information, the relevant budget criterion and student support forms, along with the rationale for funding of the APIRSSD. Please feel free to contact us with any questions; we would be happy to set up a phone conference later this week.

Brown, Samuel

From: Taylor, Martha
Sent: Friday, April 08, 2016 5:16 PM
To: Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley
Cc: Desegregation; Converse, Bruce (BConverse@steptoe.com); Tolleson, Julie; Soto, Karla; Weatherless, Renee
Subject: Deseg Budget Draft 2
Attachments: INTRO 2016-17 Budget Process Draft 2 SMP.docx; Rationale Draft 2Final.docx; 2 Budget Criteria Questions Classroom mgmt consultant2.docx; 2 Budget Criteria Questions RP consultant.docx; 2 Student Support Criteria Form final - ISI at Dietz and Roberts-Naylor.docx; 20160408 Draft 2 Form 3.pdf; 20160408 Draft 2 Form 4.pdf; 20160408 Draft 2 Form 5.pdf; 20160408 USP Budget Draft 2.xlsx; 20160408 Draft 2 Form 1-A.pdf; 20160408 Draft 2 Form 1-B.pdf; 20160408 Draft 2 Form 1-C.pdf; 20160408 Draft 2 Form 2.pdf

Dr. Hawley and counsel: Attached please find all documents for Draft 2 of the budget, including our INTRODUCTION cover sheet (INTRO) that lists all requirements per the budget process. Included are all budget forms, three Budget Criteria forms, one Student Support form, and our rationale for variances. In addition, in Form 2 we included new comments related to Draft 2 (in **bold** font).

This draft of the budget can provide the foundation for our discussions at our planned Budget meeting on April 20&21, per the budget process.

We will also be sending out next Friday the individual magnet plan budgets so you will have that information before we meet. Our goal for our meeting would be resolve all disputes or to develop a short list of unresolved areas that we all agree need to be further studied.

Thank you.

Brown, Samuel

From: Taylor, Martha
Sent: Friday, May 06, 2016 4:31 PM
To: Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley
Cc: Desegregation; Soto, Karla; Weatherless, Renee; Mueller, Nancy; Bruce Converse; Paul Charlton; Timothy Overton
Subject: Draft 3 USP Budget-Required Forms
Attachments: Draft 3 Final 050616.xlsx; Draft 3 Final 050616 - Adobe Acrobat Pro.pdf; Draft 3 checklist.docx

Dr. Hawley and counsel: Attached please find documents required by the budget process for draft 3 of the FY 2017 desegregation budget. In an effort to respond to your concerns about readability and convenience, we have created one PDF document that encompasses Forms 1 through 5 and the updated rationale. Each form can be accessed directly in the document using bookmarks from the left-hand side of the document. We are also sending these budget documents in Excel format, as required by the budget process, along with the Draft 3 checklist, also based on the budget process. In addition, we are sending all magnet school plans in a second email today.

The budget process provides a 20 day period for comments from plaintiffs. This year this deadline is of significant importance because of lead times required for submission to the governing board for consideration and approval in order to meet statutory deadlines. The 20-day period for comment will thus expire on May 26, 2016.

Early next week we will also be sending additional explanatory documents discussed in our budget meeting last month. These include the discipline overview, budget narrative, and a chart of professional development activities for the current year.

Thank you and have a good weekend.

Brown, Samuel

From: Taylor, Martha
Sent: Tuesday, May 10, 2016 3:58 PM
To: Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley
Cc: Desegregation; Soto, Karla; Weatherless, Renee; Bruce Converse; Paul Charlton; Timothy Overton
Subject: Deseg Budget Draft 3 Supporting Documnets
Attachments: 20160510 Discipline Narrative for Draft 3 Budget.pdf; Section 910G Budget Narrative and Analysis.pdf

Dr. Hawley and Counsel:

We have attached two documents which may be of assistance in assessing Draft 3 of the FY17 §910G budget, sent to you on Friday, May 6. The first document is a narrative regarding key sections of the FY17 §910G budget, which we hope will help you understand the “story” of the budget and will also provide some helpful comparison to actual spending levels this year and last year. The second is a more detailed description of the District’s approach to discipline, behavioral issues, and classroom management in FY17, which cuts across a number of budget activity codes. We are continuing to assemble a chart showing all of the professional development undertaken by the District this year, and its associated costs. We anticipate that this will follow in the next day or two.

Thank you.

Brown, Samuel

From: Taylor, Martha
Sent: Friday, May 06, 2016 4:32 PM
To: Alexander Chanock; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Shaheena Simons; Willis D. Hawley
Cc: Desegregation; Bruce Converse; Paul Charlton; Timothy Overton
Subject: Draft 3 USP Budget-Magnet Plans
Attachments: Magnet Plans 2016-17.pdf

Dr. Hawley and counsel: Attached please find one PDF document that includes all magnet plans for our 19 magnet schools. In an effort to continue to clarify magnet plans and rectify budgets, we have formatted magnet school plans slightly differently this year. We hope you find this new format helpful.

Have a good weekend.