

CSBA offers this sample Local Control Funding Formula (LCFF) board study session outline as general guidance to local educational agencies as they prepare to move forward with LCFF. This outline covers a great deal of information, and it may be necessary to conduct more than one study session to bring board up to speed depending on the time available. Superintendents and boards are encouraged to adapt this outline to meet local needs.

Parts 1-2 are intended to help boards begin with a review of mission, values and vision and the board's governing role.

Parts 3-4 are intended to give the board an understanding of how LCFF funding and accountability are intended to work.

Part 5 focuses on the current status of the district. This includes reviewing how the students are doing, the effectiveness of programs that serve them, and how parents and students perceive the work of the district.

Part 6 focuses on planning for informing the community and getting input from stakeholders.

Parts 7-8 focus on developing the LCAP and budget and the requirements for sharing both with the community.

Part 1: Mission

Outcomes - Board members will:

- Recommit to district mission & values /beliefs.
- Understand LCFF principles

1. *Review district mission, vision and core beliefs*
2. *Review principles of LCFF*
 - a. Equity
 - b. Local decision-making
 - i. Subsidiarity
 - ii. The role of community engagement
 - c. Accountability
 - d. Transparency
 - e. Alignment
3. *Compare district mission, vision and core beliefs to LCFF principles*
4. *Modify or reconfirm district mission, vision and core beliefs*

Part 2: Governance

Outcomes - Board members:

- Understand their governance roles and how they relate to LCFF and LCAP

- 1. *Reflect on your different governance roles*
 - a. Representative – Boards have a representative role.
 - What does the community want?
 - b. Fiduciary – Boards have a fiduciary responsibility.
 - What can the district afford to do now balanced against the future financial health of district?
 - c. Enforcement – Boards have an enforcement role – requirements in statute that must be met.
 - What we are required to do by law?
 - d. Professional – Boards govern an institution that employs professionals.
 - What do the professional educators recommend as the best path forward?

Part 3: How LCFF Funding Works

Outcomes - Board members understand:

- 2020-21 funding targets
- Realistic district revenue projections for the current and next two fiscal years
- District involvement in remaining categorical programs
- District involvement in new or continuing federal programs

- 1. *LCFF formulas*
 - a. How base, supplemental and concentration grants are calculated
 - b. The 2020-21 projected targets for the district
 - c. What the district can realistically expect in 2012-13 and 2013-14?

- 2. *What did not change*
 - a. 13 categorical programs
 - b. TIIG s & JPAs for transportation or ROC/Ps
 - a. *Adult Ed, Basic Aid, Charter Schools*
 - b. *Federal Programs: all those in which the district / COE currently participates*
 - c. *Other local issues*

Part 4: How LCFF Accountability Works

Outcomes - Board members understand:

- The timeline for completing the Local Accountability Plan (LCAP) including community input requirements
- The components of the LCAP
- The role of the county superintendent in LCAP review
- The obligation of the district to review Charter school LCAPs
- The availability of technical assistance and intervention triggers and timelines

The appendix contains a detailed informational outline for the board and staff on for this section.

Part 5: Determining District Status

Outcomes - Board members:

- Reach agreement on the status of the district based on a review of available demographic data, student outcomes data, financial data, program data, and perception data
1. *Reach agreement on the status of the district*
 - a. Who **are** our students? – Data that identifies key characteristics of the student population including demographic data.
 - b. **How** are **they** doing? - Achievement data disaggregated demographic factors
 - c. How are **we** doing?
 - i. Progress towards district goals over time
 - ii. Compared to other districts, Count & State
 - d. How are our **resources allocated**? - Report on programs by staffing, cost, number of students served
 - e. How does everyone **think** we are doing? – Perception data, culture surveys, feedback ...
 - f. How are we doing with our partners / bargaining units?
 - i. What is the status of the current contract?
 - ii. Is there any contract language affected by LCFF?
 - iii. How is our relationship with our bargaining units?

Part 6: Plan for Community input

Outcomes - Board members:

- Ensure the superintendent schedules community input and advisory committee activity
1. Required for LCFF
 - a. Consult with teachers, principals, administrators, other school personnel, bargaining units, parents and pupils in developing the LCAP

- b. Establish Parent Advisory Committee to provide advice to board and superintendent on LCAP requirements
 - c. Establish an English Learner Parent Advisory Committee if district English learner enrollment is at least 15% and 50 pupils
2. Assessing community needs for engagement
 - a. Language / Translation concerns
 - b. Structures: Forums, Committees
 - i. Availability / Convenience
 - ii. Child care support
 - iii. Meals
 - c. Community Partners
3. Resources for Community Engagement
 - i. Families in Schools publication
4. What community may need:
 - a. District mission, vision & beliefs
 - b. Status of District
 - c. LCFF Funding predictions
 - d. LCAP requirements and timeline
 - e. Understand the community input role and board authority
 - f. Opportunity for:
 - i. Questions
 - ii. Sharing experience
 - iii. Creative thinking

Part 7: Board Strategic Thinking

Outcomes - Board members:

- Reach agreement on goals for student outcomes for the LCAP.
 - Reach agreement on core strategies for reaching goals for the LCAP.
 - Approve a draft budget that fund the strategies and aligns to LCAP.
 - Schedule the public input sessions/ hearings necessary.
1. *Shift mindset from budgeting (balancing the numbers) to investing (fully funding your strategies)*
 2. *Clarify goals for:*
 - a. Ethnic subgroups
 - b. Socioeconomically disadvantaged students
 - c. English learners
 - d. Students with disabilities

- e. Foster youth
- 3. *Identify core strategies* with superintendent and district leadership
- 4. *Align budget to LCAP strategies*

Part 8: Transparency

Outcomes - Board members:

- Ensure that plans for sharing the LCAP and budget meet state requirements and local needs.
 - Determine how the board will monitor budget and LCAP development.
1. *Share the LCAP and budget* - Prior to scheduling the public hearing on the LCAP, The Superintendent must:
 - a. Present the LCAP for review and comment to the Parent Advisory Committee and any EL Parent Advisory Committee, and must respond in writing to written comments
 - b. Notify the public of the opportunity to submit written comments on the specific actions and expenditures proposed
 - c. Hold at least one public hearing to solicit recommendations and comments from the public regarding the specific actions and expenditures in the LCAP
 - d. Hold the public hearing at the same meeting as the public hearing required on the district budget
 2. *Adopt the LCAP and the budget*
 - a. At a different [subsequent] meeting, the governing board adopts the LCAP and the district budget.

Appendix

1. *Timeline*
 - a. January 2014 - SBE adopts regulations
 - b. March 2014 – SBE adopts TLCAP templates
 - c. June 30, 2014 Local Board adopts LCAP and budget
 - d. October 2015 - SBE adopts evaluation rubrics. The purpose of the rubric is to assist:
 - i. A district, COE, or charter school in evaluating its strengths, weaknesses and areas that require improvement
 - ii. A county superintendent in identifying school districts and charter schools in need of technical assistance and the specific priorities the assistance should be focused
 - iii. The SPI in identifying districts for which intervention is warranted
 - iv. The SBE shall adopt standards for district and school site performance and expectations of performance of the 8 state priorities

2. *Content: 8 State Priority Areas*

- a. Student achievement
 - Add measures
- b. Student engagement
 - Add measures
- c. Other student outcomes
 - Add measures
- d. School climate
 - Add measures
- e. Course access
 - Add measures
- f. Basic services
 - Add measures
- g. Parental involvement
 - Add measures
- h. Common Core implementation
 - Add measures
- i. *Optional:* Other local measures

County offices also include:

- j. Services for foster youth*
- k. Instruction for expelled students*

3. Review Plan Requirements

- a. Local boards must adopt LCAP on or before July 1, 2014.
- b. LCAP shall be for 3-year periods and be updated annually.
- c. Plans must:
 - Include annual goals for all pupils and each subgroup each of the eight state priorities
 - Specify the actions the LEA will take
 - The expenditures budgeted for these specific actions
 - The expenditures that will serve pupils in the target groups and pupils reclassified as fluent English proficient.
 - Be aligned to the LEA budget

4. *Role of the County Superintendent*

- a. The district must file the LCAP with the County Superintendent within 5 days of approval
- b. The County Superintendent may seek clarification of the LCAP and the board must respond in writing within 15 days
- c. Following receipt of the District's response, the County Superintendent may submit recommended amendments which the Board must meet and consider within 15 days of receipt
- d. The County Superintendent shall by Oct. 8 approve the LCAP if the:
 - LCAP adheres to template adopted by SBE
 - District's budget includes expenditures sufficient to implement actions and strategies in the LCAP
 - Adheres to the expenditure requirements included in SBE regulations
- e. County Board files LCAP with State Superintendent

5. *Technical Assistance*

- a. If the County Superintendent does not approve an LCAP, he/she must provide technical assistance by:
 - Identifying the district's strengths and weaknesses regarding the state's eight priorities
 - Assigning an academic expert, a team of experts, or another school district to assist the district
 - Requesting that the SPI assign the California Collaborative for Educational Excellence ("CCEE") to provide assistance
- b. A district may always request and pay for technical assistance but the County Superintendent must provide it when a district fails to improve student achievement for LI, EL or FY students across more than one of the state's eight priorities

6. *Intervention*

- a. The SPI, with the approval of the SBE, may identify school districts in need of intervention. The SPI shall only intervene in a district that meets **both** of the following:
 - A district did not improve the outcomes for **three or more student subgroups**, or all subgroups in districts with less than three, in more than one state or local priority **in 3 out of 4 consecutive school years**
 - The CCEE has provided advice and assistance to the district and submits either of the following findings to the SPI: a) that the district failed or was unable to implement its recommendations; b) the inadequate performance of the district is so persistent or acute as to require intervention by the SPI