
MEMORANDUM

TO: LAUSD PER PUPIL SCHOOLS
FROM: BUDGETING FOR STUDENT ACHIEVEMENT INITIATIVE
SUBJECT: RESOURCE ALLOCATION TOOL
DATE: 3/17/2011

We are happy to inform you with an update about the Resource Allocation Tool and LAUSD's budget development announcements.

The Resource Allocation Tool is a web-based application and was created in order to allow schools to engage in a more robust and engaging budget planning and development process. To that end, the tool will allow you to utilize scenario-based or hypothetical rates in order to plan your budget for the coming year.

Use of the Resource Allocation Tool, and scenarios in developing site budgets, is completely voluntary. These scenarios are hypothetical, and are only estimates of the current information impacting our budget. The scenarios are simple estimates based on the District's current balancing solutions, adopted by the Board of Education on 2/15/11. These scenarios are hypothetical and final rates will be released on or after March 17th.

You can access the Resource Allocation Tool by visiting the following link:
<http://dt.pivotlearningpartners.org/devRA/>.

Those who attended one of trainings in early February received a user name and password. If you would like to create a new account, please contact Karin Kusuda at karin.kusuda@lausd.net.

Resource Allocation Tool Instructions

The Resource Allocation Tool was created in order to allow schools to engage in a more robust and engaging budget planning and development process. To that end, the tool will allow you to utilize scenario-based or hypothetical rates in order to plan your budget for the coming year.

Use of the Resource Allocation Tool, and scenarios in developing site budgets, is completely voluntary. These scenarios are hypothetical, and are only estimates of the current information impacting our budget.

Should schools wish to use other scenarios, make changes to these scenarios, or use no scenario at all, they are free to do so, understanding that scenarios are hypothetical and that site budgets must be balanced to the final district revenue rate when it is released.

Schools also have the option of referring to the published District norm tables for each position type to identify the position allocations they will receive and then cost out those positions to determine a funding allocation.

Your final General Fund Allocations are currently scheduled for release on or after March 17th. The scenarios you develop using the hypothetical rates can be updated or “trued” to the final per pupil rate the District supplies to you on March 17th.

Budget Planning Scenarios

The scenarios below are simple estimates loosely based on the District’s current balancing solutions, adopted by the Board of Education on 2/15/11. These scenarios are hypothetical and final rates will be released on or after March 17th. Questions regarding these scenarios can be directed to Karin.Kusuda@lausd.net or William.Bass@lausd.net. Please do not contact your School Fiscal Specialist or Budget Services regarding these scenarios.

To use the scenarios below to plan your General Fund budget, please refer to the 2010-11 School Summary of General Fund Unrestricted Revenues and Expenditures report provided for your school. Find the Total School Allocation amount on the report and adjust it for the scenarios below.

Scenario A: 10% Reduction in your total General Fund allocation.

Total School Allocation x .90 = Total School Allocation with Reduction.

Scenario B: 5% Reduction in your total General Fund allocation.

Total School Allocation x .95 = Total School Allocation with Reduction.

Categorical Allocations

Categorical Allocations were released on March 7th. Your school should have received a summary report and an allocation letter for each categorical funding source that your school site is eligible for. These dollar amounts should be entered into the Resource Allocation Tool as the final allocation amounts for these funding sources.

All revenue (categorical and unrestricted) should be entered on the same web page. The instructions for entering information in to the Resource Allocation Tool are in this document.

Questions about the Resource Allocation Tool?

Please contact Karin Kusuda with questions on how to use the tool. If Karin cannot resolve your issue, she will escalate to the appropriate area. Karin can be reached at: Karin.Kusuda@lausd.net or you can call Karin at (213) 241-6586.

Questions about the Budget or General Questions?

Please contact the School Fiscal Specialist assigned to support your campus. You can find contact information here:


[School Fiscal Specialists](#) listed by school name, alphabetically.

Revenue Entry Instructions




All revenue is entered on a single web page. To enter your school's revenue to the Resource Allocation Tool, log in using the URL below and select your school using the drop down list. Please refer to your categorical allocation letters for restricted funding amounts and program codes.

URL: <http://dt.pivotlearningpartners.org/devRA/>

Revenue Entry

1. In the horizontal navigation bar at the top of the page, hover over "Goals", then select "Goal Tree".
2. From the Goal Tree page, select "Resources" from the horizontal navigation bar.
3. To begin entering your categorical allocations, start typing directly into the text boxes.
4. Under each heading, you will either type or select an item. Some fields are open text and some include drop-down menus for your convenience. Type or select a header, resource name, and description. You can assign a number to each item that you enter, which will allow you to sort your entries based on the number you assign.
5. Enter in the dollar amount for each entry.
6. Click on the plus sign  to save your work.
7. Repeat this process for each of your categorical and general fund revenue sources.

Resource Allocation Tool symbols

Symbols	
	Save a row
	Delete a row
	Edit an existing row

Step 1
Go to "Goals" and select "Goal Tree" from the drop down menu

Step 2
To get to the revenue page, click on "Resources"

Step 3 and 4
Enter your information in the text fields. In some sections, there will be a drop down menu.

Step 5
Make sure to enter the total dollar amount for this source.

Step 6
To save your work, click on the + sign.

Header	Resource Name	Description	Sort Order	Funding Agent	Amount
QEIA	Quality Education Investment Act (QEIA)	Quality Education Investment Act (QEIA)	2	District	\$3,694.00
SGC	School Governance Council (SGC)	School Governance Council (SGC)	3	District	\$406,529.00
Title III	Title III English Language Acquisition, Language Enhancement, and Academic Achievement	Title III English Language Acquisition, Language Enhancement, and Academic Achievement	4	District	\$450,672.00
(EIA-LEP)	English Learners Programs (EIA-LEP)	English Learners Programs (EIA-LEP)	4	Federal	\$88,740.00
Title I	Title I	Title I Targeted Assistance School (TAS)	1	District	\$348,885.00
GF Unrestr	Middle School Per Pupil	Allocation (Rate x Enrollment x Att Rate) - Adjustments = Total School Allocation Revenue Rate = \$3,694 Enrollment = 1,206 Att Rate = 91.61% Cost Center Allocation = \$4,081,193 Adjustments Rate = \$367.96 Enrollment = 1,206 Adjustments = \$406,529 \$4,081,193 - \$406,529 = \$4,487,721	5	Federal	\$4,487,721.00

Entering Expenditures

You may enter and edit the expenditures for your school's programs in the "Costs" webpage. Expenditures include school and classroom materials as well as staff and support services.



This tool will create data entry templates for your school's expenditures. The template is a printable Excel spreadsheet that contains all of the data fields that you will need to enter your budget in to School Front End. You will need to print a data entry template for **each** program you budget for.

Enter Materials Expenditures

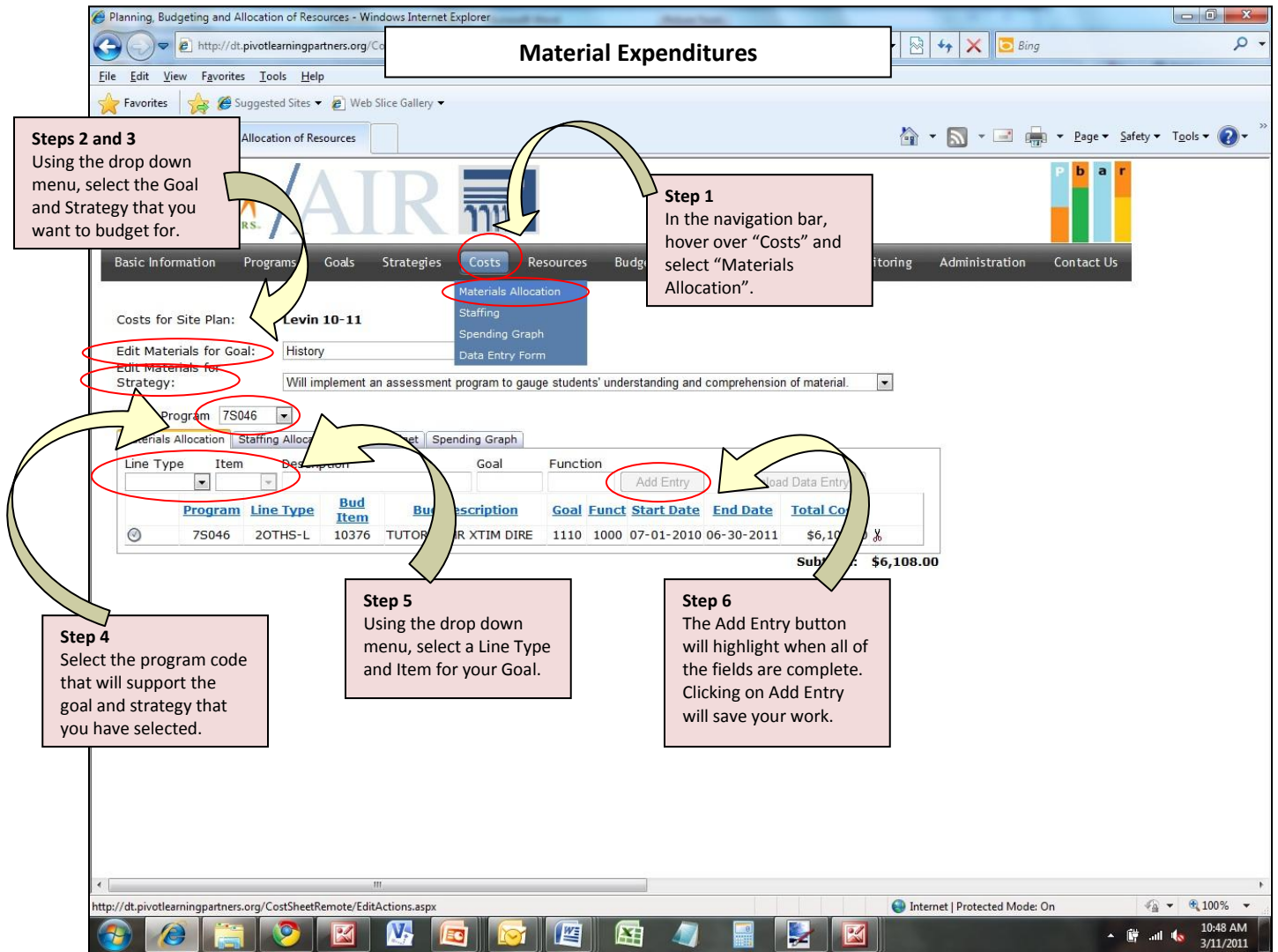
1. In the horizontal navigation bar at the top of the page, hover over "Costs" and then select "Materials Allocation".
2. To enter your costs, use the drop down list to select the "Goal" that you wish to edit.
3. Next, select a "Strategy".
4. Once you have selected a strategy that is tied to a goal, you can choose which "LAUSD Program" code to draw funds from, in order to support this goal. The programs you select will be based on the funding allocations your site has received (general fund per pupil & categoricals). Commonly used Program codes include:

13027 – Per Pupil General Fund	7S046 – Title I	70A56 – PI
7S176 – Title III	7S539 – EIA-SCE	7S536 – EIA-LEP
QEIA – 14310	7N539 – EIA-SCE	7N539 – EIA-LEP

5. Select the "Line Type" and "Item". The "Description" text field, "Goal", and "Function" will pre-populate in accordance to your "Line Type" and "Item" selection.
 - a. **PLEASE NOTE:** Some programs (e.g. 13027) may have thousands of items which can be budgeted. You will need to identify the appropriate item number by referencing previously budgeted items, referring to the Commonly Budgeted Items workbook (which can be filtered by program and alphabetically by item, description or job title), or by contacting your School Fiscal Specialist.
6. To save your work, click on the "Add Entry" button. Please note that the "Add Entry" button will not work if the "LAUSD" Program code, "Line Type", and "Item" are not correct.

If you would like to edit an existing row, click on the  sign. If you would like to delete an existing row, click on the  sign.

To add additional expenditures, you must repeat these steps for each line item, across all goals.



Material Expenditures

Steps 2 and 3
Using the drop down menu, select the Goal and Strategy that you want to budget for.

Step 1
In the navigation bar, hover over "Costs" and select "Materials Allocation".

Step 4
Select the program code that will support the goal and strategy that you have selected.

Step 5
Using the drop down menu, select a Line Type and Item for your Goal.



Step 6
The Add Entry button will highlight when all of the fields are complete. Clicking on Add Entry will save your work.

Program	Line Type	Bud Item	Bud Description	Goal	Funct	Start Date	End Date	Total Co	
75046	20THS-L	10376	TUTOR	R XTIM DIRE	1110	1000	07-01-2010	06-30-2011	\$6,108.00

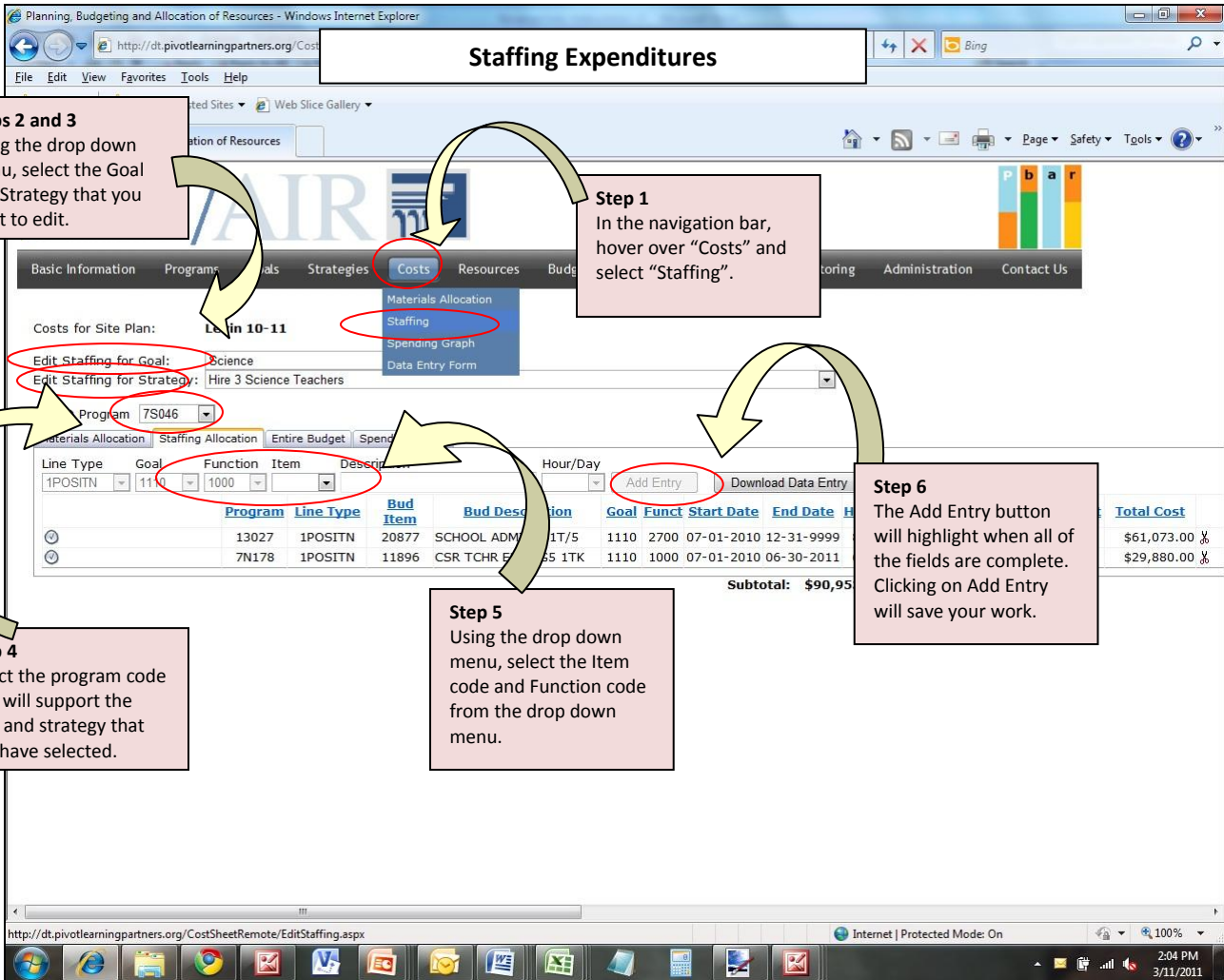
Subtotal: \$6,108.00

Enter Staffing Expenditures

1. In the horizontal navigation bar at the top of the page, hover over “Costs” and then select “Staffing”.
2. To enter your costs, use the drop down list to select the “Goal” that you wish to edit.
3. Next, select a “Strategy”.
4. Once you have selected a strategy that is tied to a goal, you can choose which “LAUSD Program” code to draw funds from, in order to support this goal. The most commonly used Program code is **13027**.
5. Determine which “Item” code and “Function” code you will use by selecting the appropriate number from the drop down menu. The “Description” field and “Hour/Day” field will pre-populate in accordance with the “Item” and “Function” that you have selected.
 - a. **PLEASE NOTE:** Some programs (e.g. 13027) may have thousands of items which can be budgeted. You will need to identify the appropriate item number by referencing previously budgeted items, referring to the Commonly Budgeted Items workbook (which can be filtered by program and alphabetically by item, description or job title), or by contacting your School Fiscal Specialist.
6. To save your work, click on the “Add Entry” button. Please note that the “Add Entry” button will not work if the “LAUSD” Program code, “Item”, and “Function” are not correct.

If you would like to edit an existing row, click on the  sign. If you would like to delete an existing row, click on the  sign.

To add additional staff, you must repeat these steps for each line item, across all goals.



The screenshot shows the 'Staffing Expenditures' web application interface. The navigation bar at the top includes 'Basic Information', 'Programs', 'Goals', 'Strategies', 'Costs', 'Resources', 'Budgeting', 'Monitoring', 'Administration', and 'Contact Us'. The 'Costs' menu is open, showing options for 'Materials Allocation', 'Staffing', 'Spending Graph', and 'Data Entry Form'. The 'Staffing' option is selected, and the 'Add Entry' button is highlighted in red. The main content area displays a table with columns for Line Type, Goal, Function, Item, Description, Hour/Day, Program, Line Type, Bud Item, Bud Description, Goal, Funct, Start Date, End Date, and Total Cost. The table contains two rows of data, with the second row highlighted. The 'Add Entry' button is located at the bottom right of the table. The interface also includes a 'Costs for Site Plan' section with 'Line 10-11' and 'Edit Staffing for Goal: Science' and 'Edit Staffing for Strategy: Hire 3 Science Teachers'.

Steps 2 and 3
Using the drop down menu, select the Goal and Strategy that you want to edit.

Step 1
In the navigation bar, hover over “Costs” and select “Staffing”.

Step 4
Select the program code that will support the goal and strategy that you have selected.

Step 5
Using the drop down menu, select the Item code and Function code from the drop down menu.

Step 6
The Add Entry button will highlight when all of the fields are complete. Clicking on Add Entry will save your work.

Data Entry Template

The Resource Allocation Tool will print out an Excel spreadsheet with all of your schools costs, as they would appear in School Front End.

Once all of your Materials and Staffing expenditures have been entered, you can generate a data entry template. The Data Entry Template is an Excel spreadsheet that you can save directly to your computer to share with others or print. All of the budgeted Programs will be on individual spreadsheets within the same workbook. You can view each spreadsheet by using the tabs at the bottom to toggle between Programs.

1. In the navigation bar at the top of the page, select "Costs" and then select a category (e.g. "Staffing Allocations" or "Materials Allocations").
2. To print, click on the "Download Data Entry" button. This will produce an Excel spreadsheet that you can open and save to your computer.
 - a. Note: You may get a message near the top of your browser that says "To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options..."
 - b. Click on the message and select "Download File"
 - c. You may be taken back to the "Costs" page. Click on Download Data Entry again and you will receive an Excel message asking if you want to open, save or cancel. To save the file click save and select a destination on your computer to save to.

The screenshot shows the 'Costs' page in the Resource Allocation Tool. The navigation bar at the top includes 'Basic Information', 'Programs', 'Goals', 'Strategies', 'Costs', 'Resources', and 'Budget'. The 'Costs' tab is selected. Below the navigation bar, there are dropdown menus for 'Edit Staffing for Goal' (set to 'History') and 'Edit Staffing for Strategy' (set to 'All'). The 'LAUSD Program' is set to '7S046'. There are tabs for 'Materials Allocation', 'Staffing Allocation', 'Entire Budget', and 'Spending Graph'. A table displays budgeted programs with columns for Line Type, Goal, Function, Item, Description, Hour/Day, Program, Line Type, Bud Item, Bud Description, Goal, Funct, Start Date, End Date, Hr/Day, PStat, FTE, and Total Cost. A 'Download Data Entry' button is highlighted with a red circle. A 'File Download' dialog box is open, asking 'Do you want to open or save this file?' for 'SignForm.xls' (Microsoft Office Excel 97-2003 Worksheet, 85.3KB) from 'dt.pivotlearningpartners.org'. The dialog has 'Open', 'Save', and 'Cancel' buttons. A 'Please wait...' message is visible at the bottom left. The Windows taskbar at the bottom shows the system tray with the date '3/11/2011' and time '2:20 PM'.

Steps 2 and 3
Using the drop down menu, select the Goal and Strategy that you want to edit.

Step 1
In the navigation bar, hover over "Costs" and select either "Materials Allocation" or "Staffing".

Step 4
Click on the "Download Data Entry" button.

Outcome
Your spreadsheet can be viewed and saved for later.