CHARTER IMPACT

THE LCAP GAP

WHEN YOUR BUDGET AND YOUR GOALS DON'T MATCH

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NETWORK: CSDC Attendee
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River Charter Schools



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WHO IS IN THE ROOM?





ONE PLAN. ONE THROUGHLINE.

Five tips for making the LCAP a shared effort between the people who set the goals and the people who steward the budget.



5 TIPS TO CLOSE THE LCAP GAP

1. Understand the plan
2. Build it together
3. Code at the source
4. Teach admins and leadership the plan
5. Check in and tell one story



TIP #1

UNDERSTAND THE PLAN



TIP 1 · PLAN TOGETHER

PURPOSE
Why does this action exist?

PEOPLE
Who does it serve?

PROOF
How will we know it worked?

VOICE
What did our educational partners tell us?

DO THIS NOW Attend one data review or educational partner session this year.



THE CONNECTION EVERY ACTION NEEDS

1. **Goal**	What student outcome needs to improve?
2. **Metric**	What evidence will show progress?
3. **Action**	What service, for whom, and how often?
4. **Dollars**	What will it cost, and from which sources?
5. **Review**	Was it delivered, spent, and effective?



STRONG ACTION STAYS AS CONDITIONS CHANGE

DESIGN

Does the action respond to an identified need?

Does the metric show whether it worked?

FUND

Can finance identify staffing, purchases, and allowable funding sources?

ADAPT

If delivery or costs change, can leaders revise the plan and explain why?



MAKE THE ACTION CLEAR ENOUGH TO FUND AND EVALUATE

BEFORE • Ambiguous action

“Provide reading support to students.”

Unclear: students served, delivery, staffing, frequency, metric.

AFTER • Traceable action

“Reading Interventionists provide small-group, evidence-based instruction in grades K–5 for students below grade level, prioritizing English learners, low-income students, and foster youth. Includes screening and monthly progress-monitoring tools.”

Now: identify staffing costs, service measures, and review points.



WHERE DOES YOUR LCAP GAP SHOW UP?

POLL 1 • Your role

- Program / instructional leadership
- Finance / business operations
- School leadership
- A combination of roles

POLL 2 • Your friction point

- Planning an action
- Estimating cost or funding
- Tracking delivery and spending
- Evaluating effectiveness

Download the LCFF Reference guide



TIP #2

BUILD IT TOGETHER



TIP 2 · PLAN TOGETHER

Program brings

- The need, goal and metric
- What the action looks like
- Early notice of changes

Finance brings

- A realistic funding picture
- What it costs and what could pay for it
- Early notice when the budget can’t hold it

Goal → **Metrics** → **Actions** → **Budget**

One page, both teams

DO THIS NOW Build a one-page view of one goal with your program lead.



Goal 1	
Ensure all students demonstrate improved proficiency in core academic areas, with a focus on reading and math.	
State Priorities addressed	Priority 1: Basic (Conditions of Learning) Priority 2: State Standards (Conditions of Learning) Priority 4: Pupil Achievement Priority 7:Course Access. Priority 8: Other Pupil Outcomes
	Metrics
1.1	% of students who score at standards Met/Exceeded on CAASPP ELA including all significant subgroups
1.2	% of students who score at standards Met/Exceeded on CAASPP Math including all significant subgroups
1.3	% of students who score at standards Met/Exceeded on California Science Test (CAST)
1.4	Academic Indicator ELA: Schoolwide Distance from standard (DFS) including all significant subgroups
1.5	Academic Indicator Math: Schoolwide Distance from standard (DFS) including all significant subgroups
1.6	% Participation Rate on CAASPP ELA
1.7	% Participation Rate on CAASPP Math
1.9	% - Reclassification Rate
1.11	% English learners who are making progress towards English proficiency on English Learner Progress Indicator (ELPI)
1.12	% of teachers are properly credentialed
1.13	% of ELs with access to ELD Standards Based Curriculum
1.14	% - Completed a-g Requirements
1.15	% - Completed CTE Course Requirements
1.16	% - Completed a-g Requirements AND CTE Course Requirements
1.17	% of students scoring at ready or conditionally ready on the EAP for ELA
1.18	% of students scoring at ready or conditionally ready on the EAP for Math
1.19	% - Passed AP with 3 or higher
1.2	% - High School Graduation Rate
1.21	% of students with access to a broad course of study, including unduplicated students and students with exceptional needs
1.22	100% of students will have home access to technology and the internet.

Action #	Title	Description
1.1	Implement Targeted Interventions	Implement Targeted Interventions: Provide after-school tutoring and small group instruction focused on foundational literacy and math skills for students performing below grade level.
1.2	Professional Development	Professional Development: Offer ongoing training for teachers in data-driven instruction, differentiated learning, and technology integration to enhance learning outcomes.
1.3	Access to High-Quality Resources	Access to High-Quality Resources: Provide students and teachers with updated instructional materials and technology (e.g., Chromebooks, digital textbooks, and adaptive software).

SCHOOL STORY: INHERITING THE GAP

WHAT THE PLAN SAID

- Action 2.1 Small Group Instruction

Implement a comprehensive, tiered instructional framework that includes high-quality core instruction, social-emotional learning, and universal interventions (Tier 1) to meet the diverse academic and behavioral needs of all students. Instructional support will include small group, differentiated instruction informed by formative, interim, and summative assessment data to personalize learning and close achievement gaps. A comprehensive literacy program will support foundational reading, comprehension, speaking, listening, and writing skills—especially for English Learners, Students with Disabilities, and historically marginalized student groups. To ensure early identification and intervention, all students in grades K–2 will be administered a dyslexia screener.

WHAT WAS HAPPENING

$250,600 Allocated

$99,102 Prior Year Allocation

What was the intention of these funds ?



SCHOOL STORY: INHERITING THE GAP

WHAT CHANGED

- I quit playing detective!
- Allocated instructional support salaries in K-2 classrooms toward this action. It resulted in an increase in funds allocated to this action.

WHO WAS INVOLVED

- Finance Team
- School Principal
- HR
- Executive Director

WHAT YOU LEARNED

- I needed to make the plan I inherited work for me, and moving forward wanted to ensure shared ownership, by planning together



WHERE IS YOUR LCAP GAP?

Identify one disconnect in your plan and a next step to address it.

1

Name your gap

Where does the connection break down: planning, funding, delivery, tracking, or evaluating results?

2

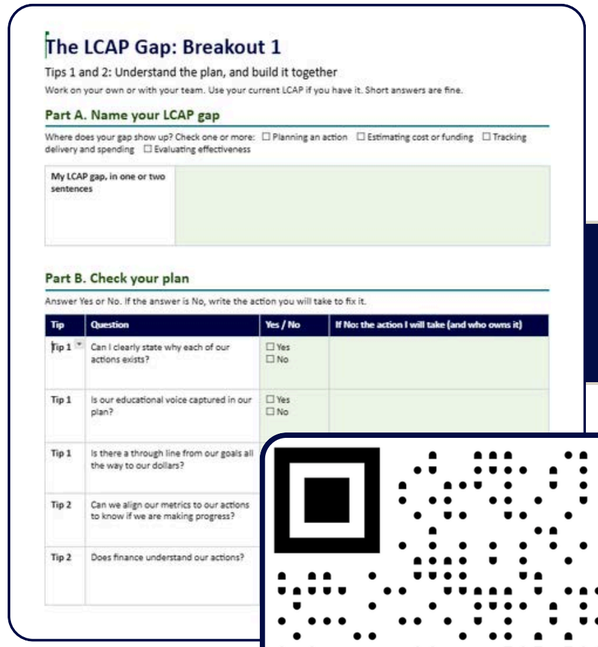
Check your plan

Answer the five Yes/No questions. For each “No,” identify an action and who should own it.

3

Choose your first move

Circle the action that would make the biggest difference. Be ready to share.



The LCAP Gap: Breakout 1

Tips 1 and 2: Understand the plan, and build it together

Work on your own or with your team. Use your current LCAP if you have it. Short answers are fine.

Part A. Name your LCAP gap

Where does your gap show up? Check one or more: ☐ Planning an action ☐ Estimating cost or funding ☐ Tracking delivery and spending ☐ Evaluating effectiveness

My LCAP gap, in one or two sentences	

Part B. Check your plan

Answer Yes or No. If the answer is No, write the action you will take to fix it.

Tip	Question	Yes / No	If No: the action I will take (and who owns it)
Tip 1	Can I clearly state why each of our actions exists?	☐ Yes ☐ No	
Tip 1	Is our educational voice captured in our plan?	☐ Yes ☐ No	
Tip 1	Is there a through line from our goals all the way to our dollars?		
Tip 2	Can we align our metrics to our actions to know if we are making progress?		
Tip 2	Does finance understand our actions?		



TIP #3

CODE AT THE SOURCE



CODE EVERY PURCHASE AT THE SOURCE

Request → PO → Invoice → Report

One code per action

Every LCAP action has its own code in your accounting system.

Assigned at the request

Not when you’re rebuilding the year in June.

DO THIS NOW Set up one code per action, and ask for it on every purchase request.



CODE YOUR POSITIONS, TOO

For most schools, most of the LCAP money is people, not purchases.

POSITION	LCAP ACTION	FUNDING SOURCE
Tutor	**Goal 1, Action 1**	**Learning Recovery Or LCFF**
0.5 FTE	Targeted interventions	Who pays

Then the plan shows up in payroll, not only in purchase orders.

DO THIS NOW Code every position to an action and a funding source.



TRACKING CONTRIBUTING ACTIONS IN THE GENERAL LEDGER

1

CODE THE ACTION

Give every contributing action its own program or project code, named to its LCAP goal and action number (e.g., 2.3).

2

BUDGET BY ACTION

Load each action's LCAP amount into the adopted budget so the LCAP tables and the GL start from the same number.

3

MONITOR QUARTERLY

Run budget vs. actual by action code. Underspending caught in March can be fixed; caught in June, it becomes carryover.

4

REPORT FROM THE GENERAL LEDGER

Pull annual update actuals straight from the action codes. Document no-cost actions separately; the GL can't show them.



TIP #4

TEACH ADMINS THE PLAN



TEACH ADMINS THE PLAN, NOT JUST CODES

Action #	Action	Description	Budgeted items
1.1	Implement Targeted Interventions	Provide after-school tutoring and small group instruction focused on foundational literacy and math skills for students performing below grade level.	Tutor, tutoring supplies, software
1.2	Professional Development	Offer ongoing training for teachers in data-driven instruction, differentiated learning, and technology integration to enhance learning outcomes.	Conferences and workshops, consulting, substitute pay
1.3	Access to High-Quality Resources	Provide students and teachers with updated instructional materials and technology (e.g., Chromebooks, digital textbooks, and adaptive software).	Technology, educational software, instructional materials
—	Doesn't fit anything?	It may not be in the plan.	Message me before you buy

DO THIS NOW Write a one-page cheatsheet in plain language for your admin team.



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Action #	Title	Description	Budgeted Items
1.1 1305	Implement Targeted Interventions	Implement Targeted Interventions: Provide after-school tutoring and small group instruction focused on foundational literacy and math skills for students performing below grade level.	Tutor (Position Control #101): $62,000 Tutoring Supplies: Supplies, manipulatives, workbooks - $5,000 Books and Instructional Materials: New textbooks - $12,000 Data-Driven Instruction Specialist (Position Control #102): $84,500
1.2 1306	Professional Development	Professional Development: Offer ongoing training for teachers in data-driven instruction, differentiated learning, and technology integration to enhance learning outcomes.	Training Fees: Reg for workshops and conferences - $3,000 Consulting: External trainer for data-driven instruction - $2,500 Sub Pay: Coverage for teachers attending training - $35,000 Technology Integration Coach (Position Control #103): $64,000
1.3 1307	Access to High-Quality Resources	Access to High-Quality Resources: Provide students and teachers with updated instructional materials and technology (e.g., Chromebooks, digital textbooks, and adaptive software).	Technology: Software licenses for intervention programs - $10,000 Technology: Tutoring/Small Group Chromebooks - $30,000 Educational Software: Digital curriculum subscriptions - $8,000

TIP #5

TELL ONE STORY



CHECK IN TOGETHER, AND TELL ONE STORY

Planned vs. actual, by action, on a schedule, with program and finance in the same meeting. Then the same data for every audience, at the depth that fits.

Staff

What the plan funded in your area

Parents

What we heard from you and what we did

Board

Spending by goal and the metrics it’s tied to

DO THIS NOW Put a regular finance and program check-in on the calendar.



KEEP THE CHECKLIST IN FRONT OF YOU

BEFORE DRAFTING

Who owns the LCAP and budget?
Have we reviewed last year’s actuals?

WHILE DRAFTING

Does every action have an owner, timeline, cost and fund source?

BEFORE ADOPTION

Do totals, staffing, sources and the action tables agree?

Open the “The LCAP Gap: Apply the Five Tips” handout.



TAKE THE GUIDE BACK TO YOUR NEXT JOINT MEETING

FALL

Joint kickoff; review outcomes and actuals.

WINTER

Partner input; compare actions with interim spending.

JAN–APR

Draft actions and cost/fund source together.

MAY–JULY 1

Update drafts; verify alignment and adopt.



FIVE TIPS, ONE STARTING POINT

1. **Understand the plan**
2. **Build it together**
3. **Code at the source**
4. **Teach admins and leadership the plan**
5. **Check in and tell one story**

DO THIS WEEK

Pick one goal.

Sit down with your finance or program counterpart.

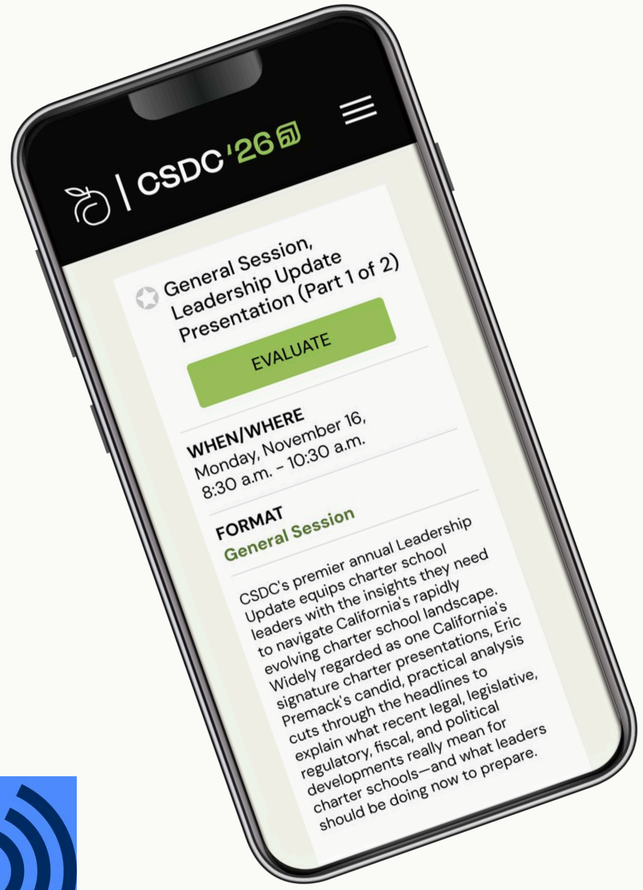
Put the first check-in on the calendar.



THANK YOU

QUESTIONS?

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SUBMIT BY NOVEMBER 30 TO QUALIFY

$100 or $50

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LCAP RESOURCES

- One Plan, Two Halves: LCAP + Budget Quick Guide
- From Action to Budget Line: LCAP Action Examples
- The LCAP Gap: 5 Tips at a Glance

