

Bruce, Renee, and Glen,

Here's my feedback on the Description sections I have received so far. In substance, they are just fine, especially for a first time through. I have corrected a few typos and pointed out some omissions, but my main suggestions are in presentation, to make things easier for the multiple readers who will eventually read or at least refer to these reports. At the end, I have some suggestions for next time around on the budgetary information.

#### Facilities

- The budget was supposed to be attached, but it was not. I think it should include the current and two previous years, even though the narrative says the current staff worked only on 2009-10.
- Item 4, first para: Should read, "...provides support for all District meetings."

#### Payroll

- The narrative does not directly address the value of the services to "all employees," even though it says the service is "courteous, accurate, [and] quality." One answer to the question of value might be simply that both employees and the District can count on the accuracy and reliability of the service. That resonates with the department's mission, which is "Protect District and employee financial security through accurate compensation."

#### Purchasing

- For ease of reading, number or bullet the eight answers, rather than running them together.

#### Accounting, etc.

- Purpose section runs on a bit. It would be better for readers if you bulleted these items:
  - Reporting financial information to various agencies,
  - Perform specialized clerical work in connection with validation, examination, reconciliation and recording of fiscal, financial and statistical records,
  - Perform financial, operational and compliance audits of district programs and activities,
  - Plan, organize, direct and control the District's fiscal management services including revenue and expenditure control, cash management, budgeting, accounting, accounts payable and fiduciary accounting.
- Assuming that people unfamiliar with the operations of this unit will be reading the report, it might be wise to add a brief note on why the 5000 series figure is so large here.

#### EduStream

- Second para typo: Should be "...as well as its many other..."
- Fifth para typo: Should be "...has been in operation for little over a year..."

#### Distributed Ed

- Only the 08-09 budget was in the packet.
- If EduStream is included in the Program 8103 budget supplied, it should be excluded, since it is reported elsewhere.

#### Data Processing budgets

- 2008-09 budget was not in the packet.

- If Program 9010 includes two units (administrative apps and tech services), they should be separated if possible.
- I do not have administrative apps and tech services narratives.

#### Printing

- I have Printing budgets but not narrative.

#### HR

- I do not have HR narrative or budget.

#### General observations for next time around

- The budget reports vary in form by unit. I suggest that the District adopt a standard budget report for program review, so that all readers see apples and not oranges. Include object code labels for ease of reference, and include overall totals as well as category totals.
- Map budget figures to units (e.g., separate EduStream from DE, as Accounting separated out Payroll)
- Decide on the level of detail really needed for comparisons and analyses: Object-code level (currently specified), or category (e.g., 1000s, 2000s, etc.)

Please remember, send your PR sections at each submission to the whole principals group, so that Bruce, Renee, and Glen can understand and respond (if you want to) to my feedback, and make suggestions in departments other than your own (again, if you want to).