

LOCAL DISTRICT PLANNING FORM

District: _____ Count: _____
 Updated for: _____

This form should be completed or UPDATED for each membership count. It should be prepared by program staff and forwarded to the auditor for use in planning the remainder of the field audit.

1. Identify the key program personnel involved in the pupil membership count, including the individual whom the auditor should contact to make arrangements for the fieldwork.

| NAME | TITLE | LOCATION | PHONE | YEARS IN POSITION |
|------|-------|----------|-------|-------------------|
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2. For each building/program at which the district provides instruction, complete:

| BUILDING/PROGRAM | LOCATION | GRADE LEVELS/ CLASS OF PUPILS | APPROXIMATE NUMBER OF PUPILS |
|------------------|----------|----------------------------------|---------------------------------|
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(Attach additional schedules if necessary)

3. One major purpose of the planning form is to provide the auditors with information about any significant changes that would affect completion of the audit. Following is a checklist of common items. Please indicate if there have been any significant changes and attach documentation as applicable.

- _____ Written procedures for ensuring a complete and accurate pupil count
- _____ Program locations or types of program categories
- _____ Systems (automated/manual) for maintaining enrollment and attendance records
- _____ Continuity in key pupil membership count positions
- _____ Participation in cooperative agreements with other local programs
- _____ Record retention procedures and practices (minimum of three year retention)
- _____ Procedures to ensure that administrative personnel document in writing their review of the completed program alpha lists, including a representation that all program documentation is on file in accordance with state laws
- _____ Training of new staff without experience in membership accounting rules and procedures

Completed by:

Name: _____

Title: _____

Date Completed: _____

Updated by:

Name: _____

Title: _____

Date Completed: _____

Updated by:

Name: _____

Title: _____

Date Completed: _____

Updated by:

Name: _____

Title: _____

Date Completed: _____