

## Local District Planning Form

District: \_\_\_\_\_

Count: \_\_\_\_\_

Updated For: \_\_\_\_\_

INSTRUCTIONS: 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	EMAIL ADDRESS	YEARS IN POSITION

2. For each building/program at which the district provides instruction, complete:  
(Attach additional schedules if necessary)

BUILDING/PROGRAM	LOCATION	GRADE LEVELS/ CLASS OF PUPILS	APPROXIMATE NUMBER OF PUPILS

3. One major purpose of the planning form is to provide 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 Updated: \_\_\_\_\_

Updated by:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date Updated: \_\_\_\_\_

Updated by:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date Updated: \_\_\_\_\_