

**Vision: We are Menifee! Where students become college and career ready.**

**Mission: Empowering future generations to be productive and successful in a global economy through community collaboration, creative thinking, instructional rigor and relevance.**

**1.0 Leadership**  
Who is the leader of your system?

Lorri Bartley, CFE, Finance Officer

**3.0 stakeholder focus**  
What is the purpose or focus as determined by key stakeholder/customer requirements?

- Students
- Teachers
- Principals
- Central Office
- Board Members
- Parents
- Taxpayers

**2.0 Goal**  
What is your defined goal which will lead you to meeting the identified requirements and how are you going to measure progress toward the goal?

- To improve financial accountability throughout the district.
- To ensure general fund maintains adequate cash balance as required

**7.0 Results**  
What are the results you expect from your actions?

- 5% contingency at the end of year
- Improved diligence when looking for bids and low costs
- Improved communication with stakeholders about cash balances and financial plans
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**5.0 Satisfaction**  
What support do you need (SD, etc.) who are your workers?

- Professional development is provided by KASBO
- In addition KDE had provided support staff to answer questions and provide hands on training
- Also mentor services will be provided for finance officer certification

**6.0 Process**  
What will you do to achieve the goal? How will you measure whether what you are doing is working or not? PDSA or PIA?

- Maintain an appropriate budget
- Review all invoices
- Review all payroll and corresponding reports
- Provide reports for grants to appropriate district staff
- Bill to appropriate companies for reimbursement
- Issue purchase
- Provide monthly and quarterly reports to appropriate agencies

- Timely federal and state reimbursements
- Accurate payroll and W-2 and 1099 processing
- Accurate reports to Board
- Protection for taxpayer \$

**4.0** How is the system doing? Are you making progress? How do you manage the data for positive change?

What data will you track on a day to day, week to week basis to monitor whether daily actions are value add to reaching the goal?

We are currently improving procedures fairly frequent and improvements can still be made. PDSA Meetings, DLT meeting and Approvals of all reports at Monthly Board Meetings