



**Finance Office**  
Derek Pinto, Ed.D.  
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978-674-4325

**To:** Liam Skinner, Superintendent  
**From:** Derek Pinto, Assistant Superintendent of Finance  
**Date:** January 16, 2026  
**Subject:** Strategic Plan Update

### **Purpose**

To provide a **progress update** for **Strategic Initiative 4.1**, a Finance Office responsibility.

### **Overview**

**Strategic Initiative 4.1:** *Refine and implement standardized procedures and processes across schools to improve efficiency, accountability, and transparency.* This is nested in the district strategic plan under **Strategic Priority 4: Supportive & Efficient Systems: Streamline district systems and processes to strategically respond to data, identify and address inequities, and prioritize student outcomes.**

The Finance Office continues to make measurable progress on Strategic Initiative 4.1. This work is intentionally sequenced into 15 steps spanning **April 2025-June 2027**, ensuring thoughtful diagnosis, development, implementation, training, and continuous improvement. To date, the Office is on track with the established timeline and has completed or advanced several processes important to district systems.

### **Work Completed to Date**

Consistent with the early phases of the Strategic Plan (Steps 4.1.1–4.1.7), the Finance Office has focused on clarifying decision rights, identifying inefficiencies, and developing core **Standard Operating Procedures (SOPs)** that directly support school and central office operations.

### **Draft & Completed SOPs**

- **Acceptance of Financial and Material Donations:** A standard process for accepting and managing financial and material donations.
- **Purchase of Food:** Ensuring compliance with state and federal financial regulations, including the appropriate use of public funds.
- **Position and Budget Verification for New Hires:** requiring all offices to verify the availability of a position and confirm funding exists in the budget before proceeding with a new hire.
- **Outstanding Prior Year Expenditures:** Establishing a standardized process for identifying, reviewing and resolving outstanding prior year expenditures in compliance with the Massachusetts office of Elementary and Secondary Education (DESE) financial reporting requirements and Massachusetts General Laws as they relate to procurement.
- **Disposal of Surplus Materials:** A standard process for disposing of materials that have exceeded their useful life.

### **Developed and Implemented Best Practices**

These represent the creation of some standard procedures that are now in practice for various areas.

- **Budget Development Calendar:** Establishing a roadmap to organize and schedule all activities needed to create a budget. This ensures timely data collection, coordination between offices and a breakdown of the complex budgeting process into manageable steps with specific deadlines for submissions, reviews and approvals.
  - **Budget Guardrails:** Established clear fiscal parameters to promote consistency, equity, and compliance in school-based budgeting decisions.
  - **Budget Weights & Transitions:** Formalized enrollment-based and programmatic weights, as well as transition rules to create manageable year-over-year changes, in the development of the upcoming fiscal year budget.
- **Parking Guidelines:** Standardized internal guidance to ensure consistent application and oversight.

- **Early Release Administrative Assistant Check-Ins:** Implemented structured sessions focused on:
  - Reviewing common practices across schools
  - Sharing best practices
  - Conducting monthly purchase order (PO) reviews
  - Monitoring year-to-date (YTD) budget status

These efforts have strengthened internal controls, improved budget monitoring, and increased shared understanding across school-based administrative staff.

### **Communication and Socialization**

A key component of Strategic Initiative 4.1 is ensuring that procedures are developed, clearly communicated and understood. To that end, the Finance Office has actively socialized new SOPs and Best Practices through multiple channels:

- Posting and maintaining resources on the Finance Office website
- Regular updates via the LPS Leader weekly publication
- Direct communication during in-person budget meetings, leadership meetings, and all-administrator meetings

This multi-channel approach has supported transparency, consistency, and broad access to guidance across the district.

### **Alignment to Strategic Plan Timeline**

The work completed aligns with the plan's initial sequencing, including:

- Diagnostic work and feedback collection
- Development of core procedures and tools
- Early implementation and communication of standardized practices

Upcoming phases will focus on formal stakeholder feedback, refinement of procedures, development of training plans, and structured training for central office staff and school leaders, consistent with Steps 4.1.8–4.1.12.

### **Next Steps**

Over the next phase of the timeline, the Finance office will:

- Continue refining SOPs based on stakeholder feedback
- Expand the SOP library
- Develop and deliver targeted training for central office staff and school leaders
- Prepare for mid-year and end-of-year assessments of clarity, effectiveness, and implementation fidelity

### **Conclusion**

The Finance office's progress on Strategic Initiative 4.1 reflects a deliberate, phased approach to building sustainable systems that promote efficiency, accountability, and transparency. Early wins in budgeting procedures, operational guidance, and communication have established a strong foundation for the remaining phases of this multi-year initiative.



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**From:** Derek Pinto, Assistant Superintendent of Finance  
**Date:** January 16, 2026  
**Subject:** Strategic Plan Update

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**To:** Liam Skinner, Superintendent  
**From:** Derek Pinto, Assistant Superintendent of Finance  
**Date:** January 16, 2026  
**Subject:** Strategic Plan Update

### **Purpose**

To provide a **progress update** for **Strategic Initiative 4.1**, a Finance Office responsibility.

### **Overview**

**Strategic Initiative 4.1:** *Refine and implement standardized procedures and processes across schools to improve efficiency, accountability, and transparency.* This is nested in the district strategic plan under **Strategic Priority 4: Supportive & Efficient Systems: Streamline district systems and processes to strategically respond to data, identify and address inequities, and prioritize student outcomes.**

The Finance Office continues to make measurable progress on Strategic Initiative 4.1. This work is intentionally sequenced into 15 steps spanning **April 2025-June 2027**, ensuring thoughtful diagnosis, development, implementation, training, and continuous improvement. To date, the Office is on track with the established timeline and has completed or advanced several processes important to district systems.

### **Work Completed to Date**

Consistent with the early phases of the Strategic Plan (Steps 4.1.1–4.1.7), the Finance Office has focused on clarifying decision rights, identifying inefficiencies, and developing core **Standard Operating Procedures (SOPs)** that directly support school and central office operations.

### **Draft & Completed SOPs**

- **Acceptance of Financial and Material Donations:** A standard process for accepting and managing financial and material donations.
- **Purchase of Food:** Ensuring compliance with state and federal financial regulations, including the appropriate use of public funds.
- **Position and Budget Verification for New Hires:** requiring all offices to verify the availability of a position and confirm funding exists in the budget before proceeding with a new hire.
- **Outstanding Prior Year Expenditures:** Establishing a standardized process for identifying, reviewing and resolving outstanding prior year expenditures in compliance with the Massachusetts office of Elementary and Secondary Education (DESE) financial reporting requirements and Massachusetts General Laws as they relate to procurement.
- **Disposal of Surplus Materials:** A standard process for disposing of materials that have exceeded their useful life.

### **Developed and Implemented Best Practices**

These represent the creation of some standard procedures that are now in practice for various areas.

- **Budget Development Calendar:** Establishing a roadmap to organize and schedule all activities needed to create a budget. This ensures timely data collection, coordination between offices and a breakdown of the complex budgeting process into manageable steps with specific deadlines for submissions, reviews and approvals.
  - **Budget Guardrails:** Established clear fiscal parameters to promote consistency, equity, and compliance in school-based budgeting decisions.
  - **Budget Weights & Transitions:** Formalized enrollment-based and programmatic weights, as well as transition rules to create manageable year-over-year changes, in the development of the upcoming fiscal year budget.
- **Parking Guidelines:** Standardized internal guidance to ensure consistent application and oversight.

- **Early Release Administrative Assistant Check-Ins:** Implemented structured sessions focused on:
  - Reviewing common practices across schools
  - Sharing best practices
  - Conducting monthly purchase order (PO) reviews
  - Monitoring year-to-date (YTD) budget status

These efforts have strengthened internal controls, improved budget monitoring, and increased shared understanding across school-based administrative staff.

### **Communication and Socialization**

A key component of Strategic Initiative 4.1 is ensuring that procedures are developed, clearly communicated and understood. To that end, the Finance Office has actively socialized new SOPs and Best Practices through multiple channels:

- Posting and maintaining resources on the Finance Office website
- Regular updates via the LPS Leader weekly publication
- Direct communication during in-person budget meetings, leadership meetings, and all-administrator meetings

This multi-channel approach has supported transparency, consistency, and broad access to guidance across the district.

### **Alignment to Strategic Plan Timeline**

The work completed aligns with the plan's initial sequencing, including:

- Diagnostic work and feedback collection
- Development of core procedures and tools
- Early implementation and communication of standardized practices

Upcoming phases will focus on formal stakeholder feedback, refinement of procedures, development of training plans, and structured training for central office staff and school leaders, consistent with Steps 4.1.8–4.1.12.

### **Next Steps**

Over the next phase of the timeline, the Finance office will:

- Continue refining SOPs based on stakeholder feedback
- Expand the SOP library
- Develop and deliver targeted training for central office staff and school leaders
- Prepare for mid-year and end-of-year assessments of clarity, effectiveness, and implementation fidelity

### **Conclusion**

The Finance office's progress on Strategic Initiative 4.1 reflects a deliberate, phased approach to building sustainable systems that promote efficiency, accountability, and transparency. Early wins in budgeting procedures, operational guidance, and communication have established a strong foundation for the remaining phases of this multi-year initiative.