

BSC 1.0 - Budget in the BSC



All Admin Meeting - February 3, 2015

Welcome

☞ Sign In

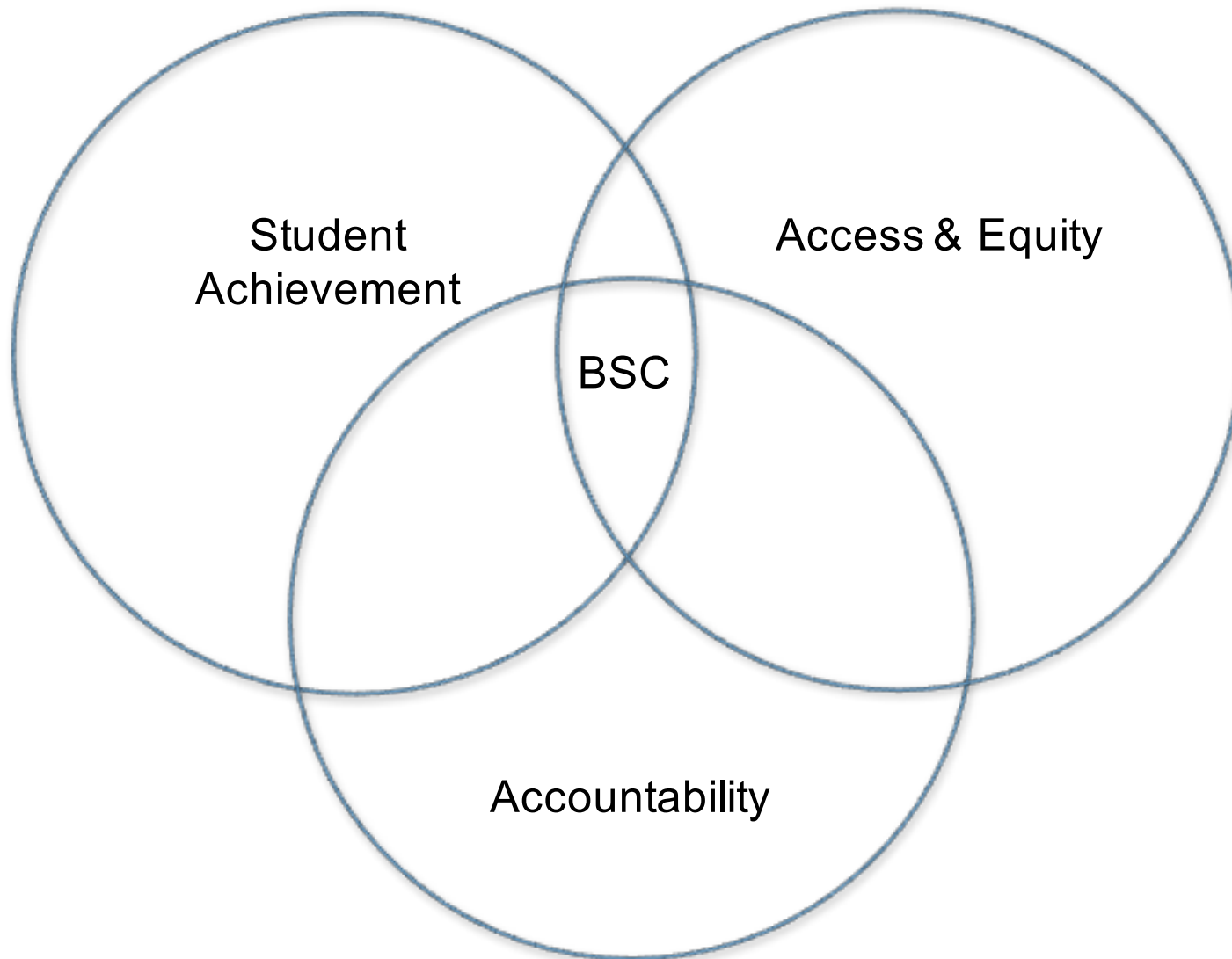
☞ Process observer

☞ Time keeper

Objectives

- ∞ Know that how we budget reflects our equity priorities
- ∞ Understand budget timelines, cycles and resources
- ∞ Review restricted school budget funding sources and how those funds can be used
- ∞ Examine school budget templates
- ∞ Think about questions and information School Site Councils should consider in developing the BSC/SPSA

Our District Goals



SFUSD's Six Strategies for Success

SFUSD's Six Strategies for Success

These, our highest leverage strategies to achieve our goals, will have impact at all levels of the system and are our shared roadmap for raising student achievement.

- 1 Implement the **SFUSD Core Curriculum** and use **student data** to make informed decisions and monitor our progress toward goals.
- 2 Provide tiered levels of academic and behavior support to all students using a **Response to Instruction and Intervention (RTI²)** model.
- 3 Build a clear vision, culture and conditions for **college and career readiness** at all school levels.
- 4 Differentiate central office supports to schools through a **Multi-Tiered System of Supports (MTSS)**.
- 5 Recruit, develop and retain **highly qualified teachers, leaders, and staff**.
- 6 Increase awareness and build the supports necessary to fully implement SFUSD's **Family Engagement Standards**.

Educational Equity

The practice of:

- holding a stance,
- developing policies and processes,
- using a set of tools, and
- making decisions and taking actions ...

towards the explicit and intended goal of “equal and excellent results” for students regardless of external or internal, social or cultural contexts.

(borrowed from SF-CESS)

Think-Pair-Share

What are some ways your school or department has used/can use the budget development process to address educational inequity for students?

Budget Planning Timeline

Fall-Winter 2014

Spring 2015

Fall-Winter 2015

- Review the school site plan (BSC/SPSA) goals
- Gather and review data about current student needs from SSC/ELAC & others
- Review alignment of current budget to priorities

- Mid-Plan check
- Review preliminary budget allocations
- Complete Mid-Plan Addendum
- Review with SSC/ELAC & others and get preliminary approval from SSC
- **DUE: March 27**

- Review the priorities and check against Fall data and final budgets
- Update and finalize BSC/SPSA Mid-Plan Addendum with data and revised budget numbers
- Review final BSC/SPSA with SSC/ELAC and get approval from SSC

Important Budget Terms

- ∞ Weighted Student Formula (WSF)
- ∞ Supplemental v. Restricted v. Categorical
- ∞ State Resources- Supplemental
 - Supplemental Concentration Grant-English Learner (SCG-EL) *
 - Supplemental Concentration Grant – Low Income (SCG-LI) *
 - Concentration Grant *
 - Targeted Instructional Improvement Block Grant (TIIG)
 - School Library Improvement Block Grant (SLIBG)
 - Quality Education Investment Act (QEIA)
- ∞ Federal Resources – Categorical and Supplemental
 - Title I *

Weighted Student Formula (WSF)

- ∞ What is WSF?
 - A way to distribute funds to schools that takes into account the student count and specific attributes of the students at each school.
- ∞ How is our school's WSF amount calculated?
 - Enrollment by grade level
 - Enrollment of students with special characteristics
 - English Language Learners
 - Socio-Economic Status
 - Special Education
- ∞ Money follows each student to his/her school, and each school's budget is expressed in dollars instead of FTE's (positions)

The enrollment in each category times the base funding factor times the weight assigned to each category equals the school's dollar amount for that category

Elementary School A Preliminary Weighted Student Formula and Consent Decree Allocation for SY 2013-14

Enrollment							Special Education Enrollment				
Grade Levels	Total Enrollment	ELL			SES	RSP	SDC-NS	SDC-S	Total		
		LTNR	Beg. / Int.	Adv. / Trans.							
Kindergarten	88		43		43	41	2	2	4		
Primary (1-3)	259		39	75	114	120	10	6	16		
Intermediate (4-5)	168		12	16	28	78	10	2	12		
Middle School (6-8)											
High School (9-12)											
Total	515		94	91	185	238	22	10	32		
Allocation of Dollars Based on Base Funding Factor of \$2,901.65											
Grade Levels	Basic Education	ELL			SES	Total	Special Education Dollars				
		LTNR	Beg. / Int.	Adv. / Trans.			RSP	SDC-NS	SDC-S	Total	
Kindergarten	\$ 322,757	\$ -	\$ 8,600	\$ -	\$ 8,600	\$ 10,640	\$ 341,997	\$ 56	\$ 104	\$ -	\$ 160
Primary (1-3)	966,465		7,800	11,625	19,425	31,316	1,017,207	281	312		593
Intermediate (4-5)	487,478		2,400	2,480	4,880	20,313	512,671	281	104		385
Middle School (6-8)											
High School (9-12)											
Total Student Allocation	\$ 1,776,700	\$ -	\$ 18,800	\$ 14,105	\$ 32,905	\$ 62,270	1,871,875	\$ 619	\$ 520	\$ -	\$ 1,139
Foundation Allocation "Floor Plan" Funds							189,930				
Total Weighted Student Formula Allocation (Excluding Special Education)							\$ 2,061,805	WSF Sp. Ed. Allocation		\$ 1,139	
Targeted Instructional Improvement Block Grant							\$ -				

Total funds from Weighted Student Formula (WSF)

Weighted Student Formula (WSF)

- ∞ How can our school spend WSF funds?
 - Fund the Core program first AND
 - **Specific core services necessary for the identified student populations (e.g. ELD for English Learners, support classes for under-performing students)**
 - Additional funds may be spent on “any lawful purpose to support student achievement”
 - Additional funds should be spent to support the priorities identified in your school’s BSC/SPSA

Unrestricted v. Restricted Funds

Unrestricted Funds

- ☞ Most unrestricted funds come from WSF

Restricted Funds

- ☞ Restricted funds come from various sources:
 - Federal or State grants
 - Local grants

Unrestricted v. Restricted Funds

Unrestricted Funds

- ☞ Core funding
- ☞ Schools have some latitude in spending these funds after meeting core program requirements

Restricted Funds

- ☞ Categorical or supplemental funding
- ☞ Schools must comply with state, federal or local restrictions when spending these funds
- ☞ Should be used to *supplement not supplant* the Core Program
- ☞ Subject to additional reporting requirements

Categorical Funding

Title I

- ∞ Provides support to improve instruction in high poverty schools to ensure all students meet academic proficiency
- ∞ At least 1% must be used for Parent Involvement

SCG - EL

- ∞ Provides increased and/or improved services that assist English Language Learners (ELs) in achieving proficiency in the English language and improving academic achievement for these identified students

SCG - LI

- ∞ Provides increased and/or improved services for students achieving below the level appropriate for their age or grade

Concentration Grants

Elementary School
Fall Final Allocations
SY 2014-2015

WSF, LCFF and TIIG Resources

Site Amount

Weighted Student Formula	\$ 1,210,076
Special Ed-WSF Site Allocation	\$ 3,050
SCG-LI	\$ -
SCG-EL	\$ 63,700
Concentration	\$ 25,000
Targeted Instruction Improvement Grant	\$ 235,800

	\$ 1,546,626

Restricted General Fund Resources

Title I	\$ 73,357
Quality Education Investment Act*	\$ -
PEEF Arts & Music	\$ 2,380
PEEF Library (Budgeted Centrally)	\$ -
PEEF PE	\$ -

	\$ 75,737

One-Time Funding Sources

SLIBG Carryover*	\$ 19,245
Discretionary Block Grant Carryover*	\$ -

	\$ 19,245

Grand Total

\$ 1,641,609

*Includes carryover from prior year.

Each school site receives **restricted funds** from multiple sources.

For 14-15: grouped this way

For 15-16: supplemental for improved/increased services

Supplement NOT Supplant

- ☞ You cannot spend restricted dollars on core or basic programs
- ☞ In other words: You cannot use categorical dollars to pay for something you would normally have in your core program
- ☞ Example: Restricted funding cannot be used to pay for administrators, the classroom teachers (except for those that reduce class size), the school secretary, and a minimal level of supplies.

Students in Special Populations

- Special Education, English Learners, Low Income Students
 - Categorical funds force us to think about students in special populations and the issues they confront, so make sure you ask:
 - What are we doing to support the academic achievement of these students through the general fund?
 - What are we doing to support the academic achievement of these students with our categorical funds?

Mid-Plan Check on BSC/SPSA and Budget

∞ Questions for SSC to consider:

- What are our school's priorities for this two-year plan as identified on the BSC/SPSA?
- What is the data telling us about how our plan is working?
- How do our current expenditures support our school priorities?
- Are our current expenditures working? Are we making measurable progress? How do we know?
- What do we want to continue? What might we do differently?

Checking the List

**Making resource decisions and completing
the budget section on the Mid-Plan
Addendum**

SECTION IV: MID-PLAN CHANGES TO SCHOOL BUDGET AND RESOURCE PRIORITIES

Using your updated data analysis and changes to your school plan, please outline how you will prioritize your site's resources dedicated for specific student groups the coming school year. As reference, the Site Based Budget Guide can be found here: http://www.sfusd.edu/en/assets/sfusd-staff/councils-and-committees/files/SSC/SBB_Guide_Fall_2014.pdf

WSF fund are part of you school site budget and funds the core program. Recognize that there are additional weights in WSF for the purpose of providing specific services for English Learners and Low Income students. This should be reflected in the budgets submitted on FileMaker Pro.

Site-Based Resources		
Funds Designated to Support English Learners		
LCFF Supplemental Concentration for English Learners (SCG-EL)	\$	
Funds Designated to Support Students Identifying as Low-Income		
LCFF Supplemental Concentration for Students Identifying as Low-Income (SCG-LI)	\$	
Funds Designated to Support Students with Disabilities		
WSF-Special Education	\$	
Funds Designated to Support Special Populations, including English Learners, Students Identifying as Low-Income and Foster Youth		
LCFF Concentration Allocation	\$	
Title I	\$	
Title I 1% for Parent Involvement		
Targeted Instructional Improvement Block Grant (TIIBG)	\$	
Funds Designated for Class-Size Reduction		
QEIA	\$	
Other Funds		
	\$	

BSC/SPSA Supplemental Funds in Section IV should support program goals

Centrally Managed Services & Supports	
Service/ Support	High leverage strategies this service or support will accomplish

MTSS Supports

Recommendations for Developing a Better Budget

- Make sure the budget directly supports the priorities identified in the BSC/SPSA
- Make sure the budget is balanced to the allocation
- Confront tough choices
 - Prioritize all non-Core Program spending options
 - Be honest about trade-offs
 - Avoid the tendency to preserve the status quo
- Think holistically
 - Consider other funding sources (PTA, private grants)
 - Coordinate with other groups where possible
- Don't start from scratch – use templates

Time Accounting

- ∞ Documentation required by state and federal regulations for staff salary funded with categorical funding.
- ∞ Two reporting types:
 - Time and Effort Report: Monthly reports for staff funded from more than one resource, at least one of which is federal (Title I)
 - Time Certification Report: Semi-annual report for staff funded from a single federal or state resource

This means: If you don't multi-fund an employee across a federal resource then you can do semi-annual time certification

Resources!

WRITTEN DOCUMENTS

- School Site Council website page
- State & Federal programs website
- BSC and Budget Guide

REAL LIVE PEOPLE

- State & Federal Programs
- MPD

<http://www.sfusd.edu/en/councils-committees/school-site-council.html>

Wrapping Up

- ☞ Your feedback is important!
 - <http://tinyurl.com/sfusdfeedback>
 - Reflection
- ☞ Process observation
- ☞ Celebrations