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# Strategic School Funding for Results (SSFR)

**A Presentation prepared for the Association for Education Finance and Policy**  
Saturday, March 26, 2011

**Session Chair:** Jay G. Chambers, AIR, SSFR Co-Principal Investigator

**Presenters:** Karen Manship, AIR, SSFR Research Analyst

Iliana Brodziak, AIR, SSFR Research Analyst

Jesse Levin, AIR, SSFR Director of Evaluation

Jim Hollis, Pivot Learning Partners, Director of Technology

*This project is currently being funded by the Institute of Education Sciences (IES), the William and Flora Hewlett Foundation, and the Ford Foundation.*

# SSFR Mission and Vision

- **Mission Statement:**

- to design a comprehensive approach for LEAs to ***finance***, **governance**, and **human resource management** with the goal to enhance student learning.

- **Vision Statement:**

- to develop a model, supported by innovative technology and processes, for future implementation and testing in other districts around the nation.

# Who's involved in SSFR?

## Two Partners



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## Two Districts



**SSFR “will make the district budget more transparent, align resources for greater impact and equity, and give schools the ability to target resources to meet their school’s specific needs, bringing funding and decision-making closer to schools and classrooms. ”** *(Latest LAUSD weekly update , March 14-18, 2011, Ramon Cortines,Supt)*

## ***Equity***

- ***Need Based Funding of Schools***
- ***Support equitable distribution of effective staff***

## ***Transparency***

- ***Simplify processes for allocating resources***
- ***Increase stakeholder participation in decision making***

## ***Innovation and Efficiency***

- ***Increase school autonomy linked to accountability***
- ***Implement performance incentives***
- ***Support educational choices***
- ***Create a market for central office services***

# Two SSFR Sessions

American Institutes for Research (AIR)  
Pivot Learning Partners (PLP)

## #1. Research Session

- Karen Manship (AIR):
  - Attitudes and Perspectives
- Iliana Brodziak (AIR):
  - Resource Allocation Analyses
- Jesse Levin (AIR):
  - Goals for Building Resource Allocation Tools
  - Targeted Revenue Model (TRM)
- Jim Hollis (PLP):
  - Planning , Budgeting and Allocation of Resources (PBAR)

## #2. Implementation

- Jim Brown (PLP):
  - Project Overview
- Matt Hill (LAUSD):
  - Administrative Office, Office of Superintendent, Los Angeles Unified School District
- Mahala Archer (TRUSD):
  - SSFR Project Manager, Twin Rivers Unified School District
- Steve Jubb (PLP):
  - Project Director, SSFR Implementation

# **Attitudes and Perspectives of Staff**

# Key Domains Measured

- Equity of resource allocation to schools
- Transparency of the budget process
- Autonomy of budget decisions
- Facilitation of innovation
- Accountability

# Attitudes and Perspectives of District Staff: 2009-10 Interviews

- Twin Rivers:
  - Interviews with key district staff
  - Focus group with five principals
- LAUSD:
  - Interviews with three central office staff
  - Interviews with eighteen principals (*UCLA business school students*)
- Pasadena:
  - Focus group with members of the Superintendent's Cabinet
  - Follow-up interviews with three key district staff
  - Interviews with five principals

# Interview findings:

## School leaders seek control over means to success

### Interviews showed that school leaders...

- Feel they need greater control over their budgets
- Believe that the schools and students would benefit from greater control
- Worry about their capacity to manage their budgets
- Do not feel that they are supported by the central office
- Vary in their understanding of the current budgeting system



# Phase II Surveys and Interviews

- Years 1 and 3: Surveys
  - Principals
  - Teachers
  - Parents and teachers on School Site Councils
- Year 2: Follow-up interviews with District officials

# Key Questions Asked of Principals

- *To what extent do you agree with the following statements?*
  - I have discretion over how the dollars in my school budget are spent. (BUDGET AUTONOMY)
  - I feel that I receive adequate support from the central office to develop my school's budget. (DISTRICT SUPPORT)
  - I have sufficient autonomy to implement an instructional program that meets the needs of the students in my school. (INSTRUCTIONAL AUTONOMY)
  - I believe funds are equitably allocated to schools within our district. (EQUITY)
  - I feel that the evaluation of my performance is related to my students' achievement. (ACCOUNTABILITY)
  - I understand how resources (staff, funds, etc.) are allocated to my school. (TRANSPARENCY)

# Key Questions Asked of Teachers

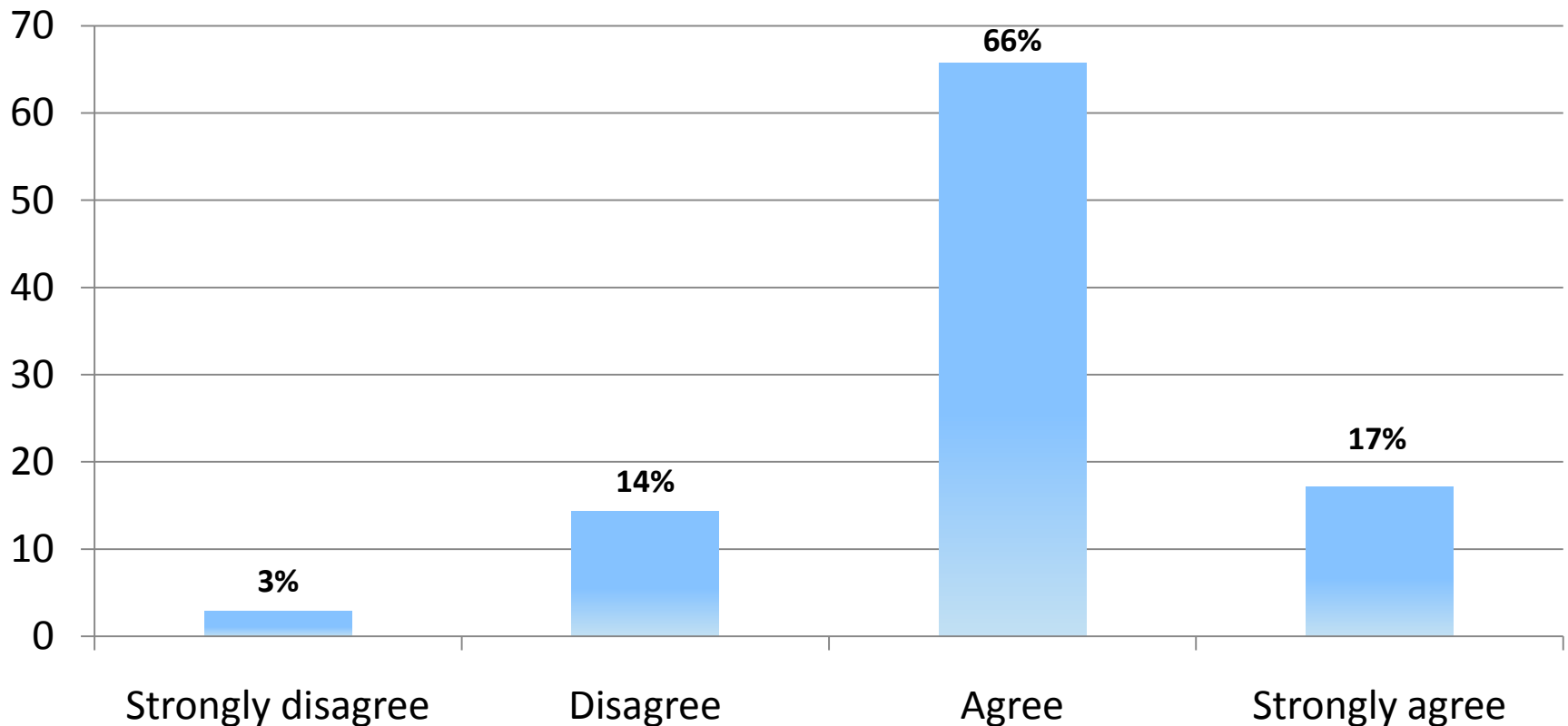
- *To what extent do you agree with the following statements?*
  - Teachers have the opportunity to provide input into developing and spending the budget at this school. (TRANSPARENCY, AUTONOMY)
  - I have sufficient autonomy to implement an instructional program that meets the needs of my students. (INSTRUCTIONAL AUTONOMY)
  - I believe funds are equitably allocated to schools within our district. (EQUITY)
  - I understand how resources (staff, funds, etc.) are allocated to my school. (TRANSPARENCY)

# Key Questions Asked of School Site Council members

- *To what extent do you agree with the following statements?*
  - The SSC has significant influence over how the dollars in this school's budget are spent. (SSC ROLE/INFLUENCE)
  - I believe funds are equitably allocated to schools within our district. (EQUITY)
  - I understand how resources (staff, funds, etc.) are allocated to my school. (TRANSPARENCY)
  - This school communicates effectively with parents about school budgets and resources. (TRANSPARENCY)

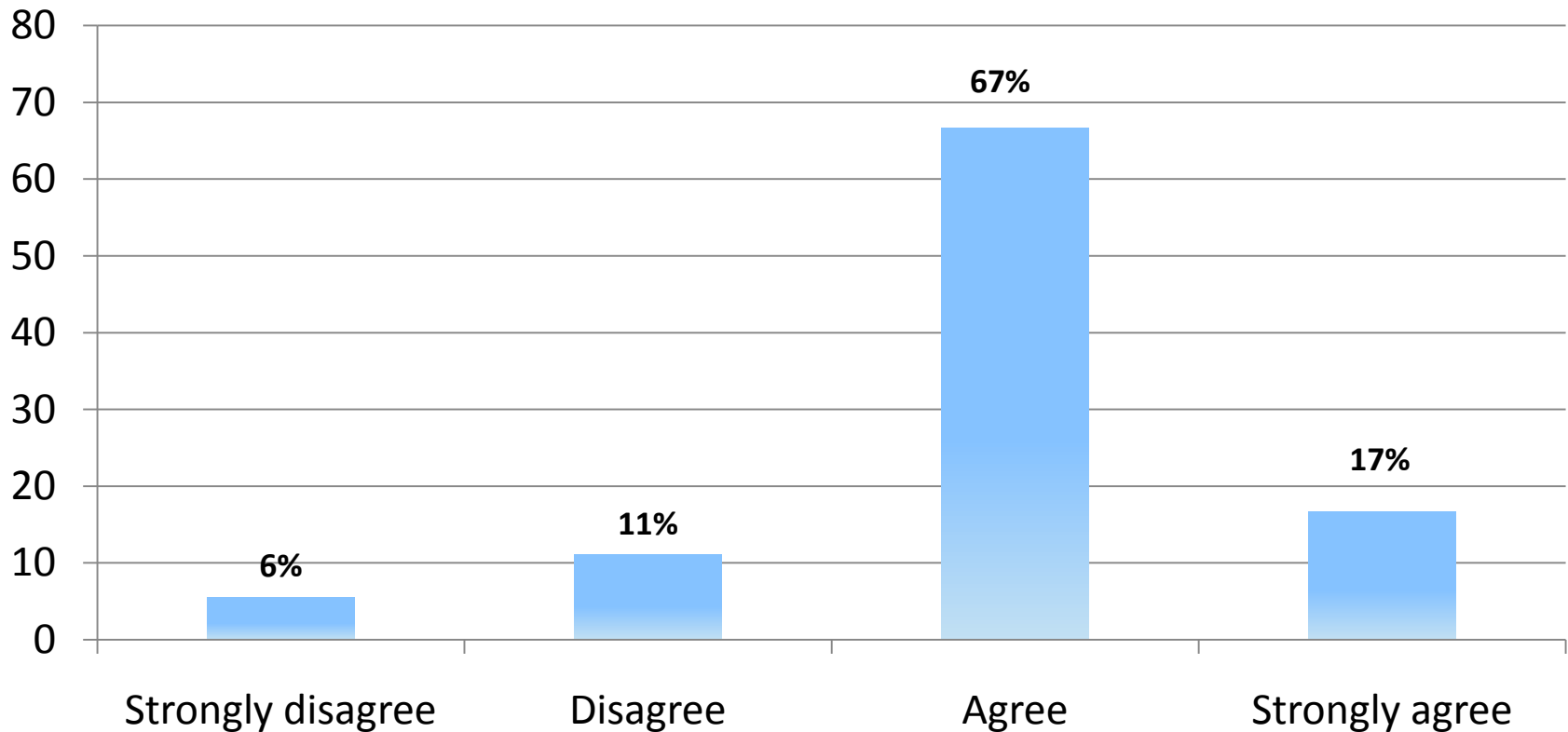
# TRUSD principals generally seem to understand how resources are allocated to their schools.

**I understand how resources (staff, funds, etc.) are allocated to my school.**



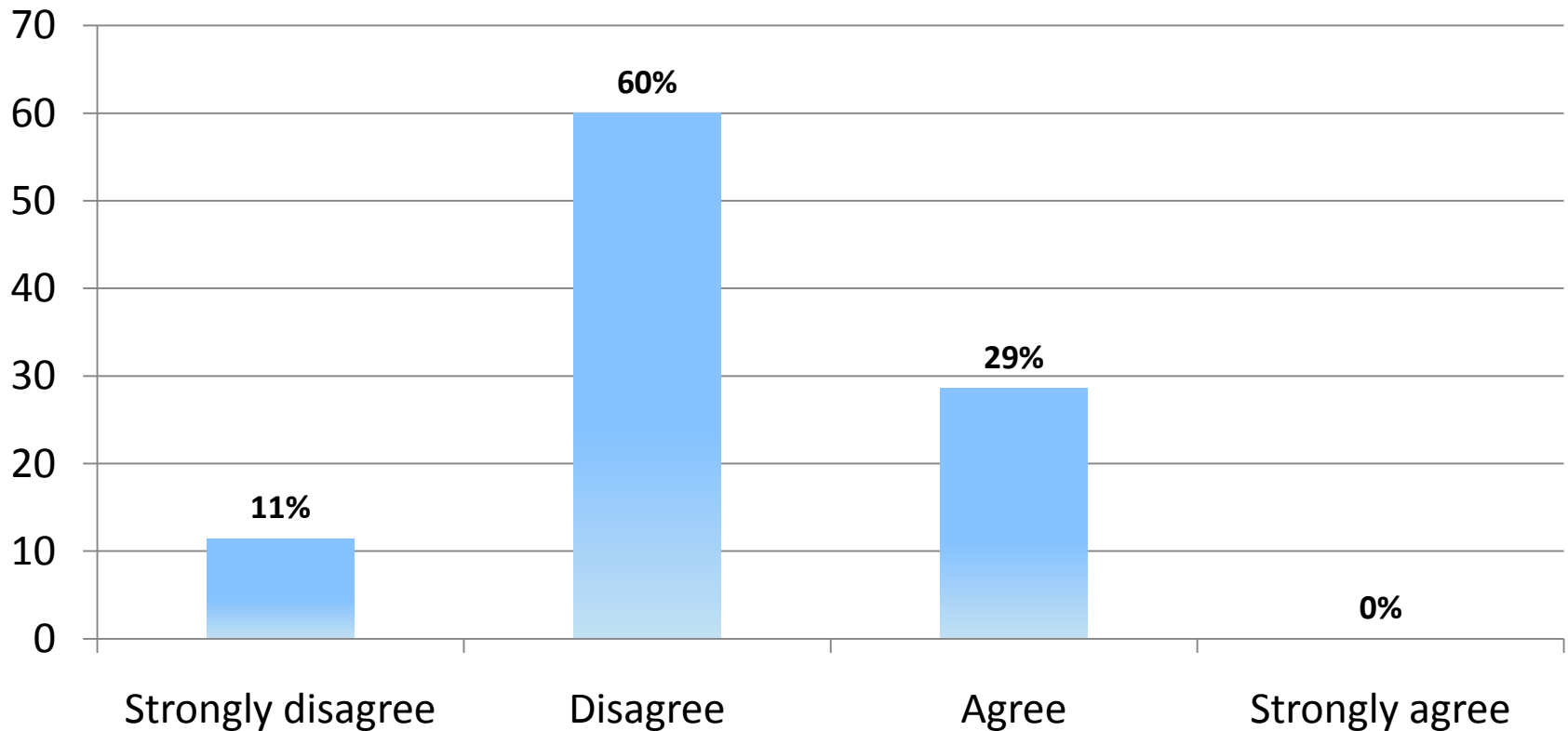
# A strong majority of TRUSD principals feel that they have discretion over how their budgets are spent.

**I have discretion over how the dollars *in my school budget* are spent.**



# Most TRUSD principals feel they have little discretion over how district dollars are used at their school.

I have discretion over how *district dollars* are spent at my school.



# Resource Allocation Agenda

- Purpose for Resource Allocation Analyses and Resource Questions
- Types of Analyses Performed and Data

# **Resource Allocation Analyses**

# Resource Allocation Agenda

- Purpose for Resource Allocation Analyses
- Resource Questions
- Types of Analyses Performed
- Examples

# Motivation and Questions

- Purpose of Resource Allocation Analyses
  - Provide baseline account of existing resource allocation patterns.
  - Evaluate changes in resource allocation over time.
- Key Research Questions
  - Are SSFR districts achieving equity in the allocation of restricted versus unrestricted funds to schools?
  - How are restricted and unrestricted dollars being spent?
  - Are teacher and other staffing resources equitably allocated both in terms of quantity and quality?

## Types of Analyses

Descriptive Analysis Across School-Level of Student Need (Percent Free/Reduced Price Lunch) and:

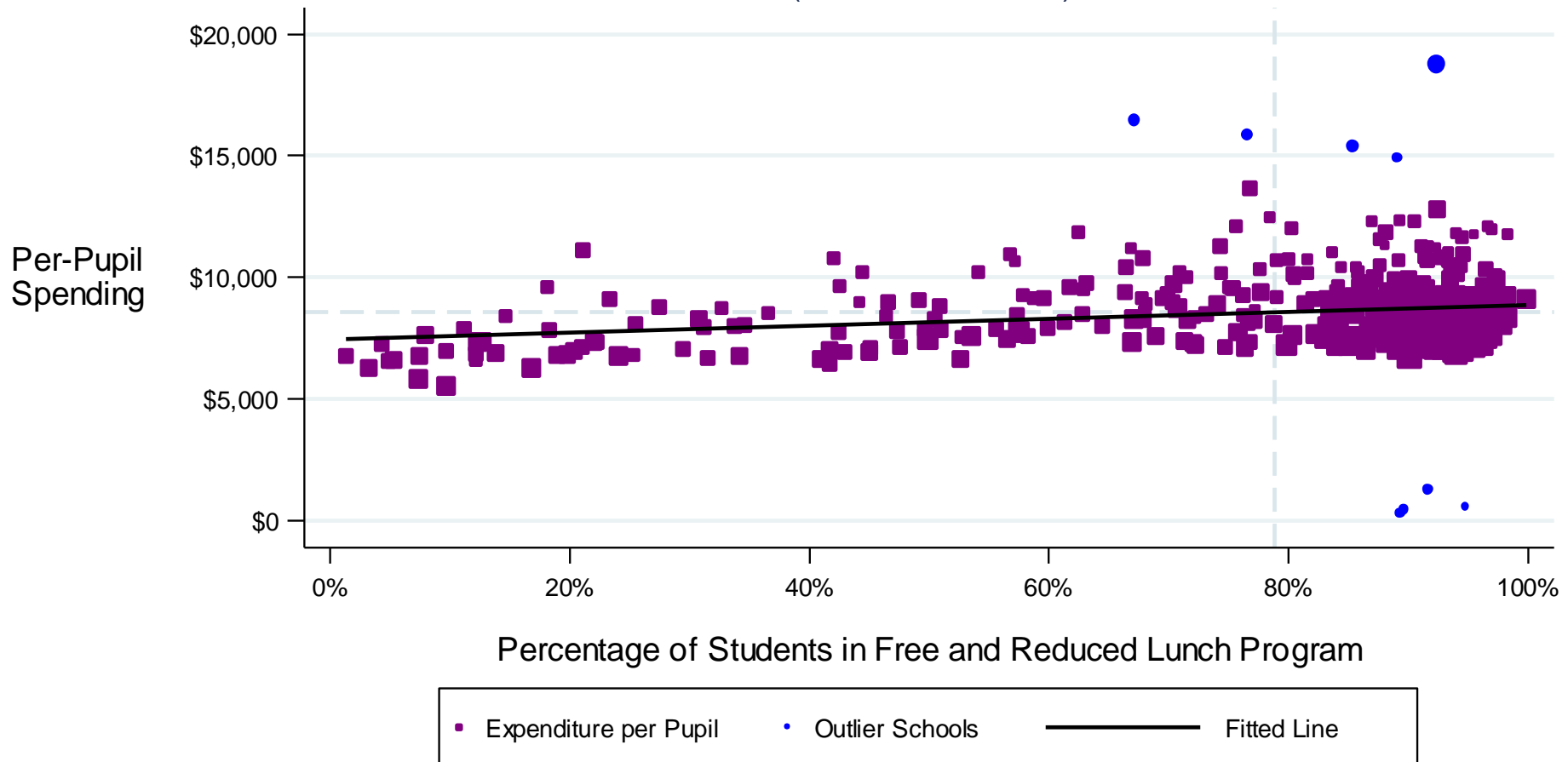
1. Per-Pupil Expenditures
  - By Type: Overall, Unrestricted, Restricted
  - Broken Out by Object (Certificated Salaries, Classified Salaries, Benefits, Books and Supplies, and Other)
  - Broken Out by Targeted Student Population (All Students, Poverty, ELL, Special Education, Low-Performing Student, and Other)
2. Personnel
  - Staffing Ratios for Administration, Instruction and Pupil Support
  - Staff Qualifications (Average Experience, Level of Out-of-Field Teaching, etc.)

Data Used

- Central District Fiscal Data and California Department of Education Demographics

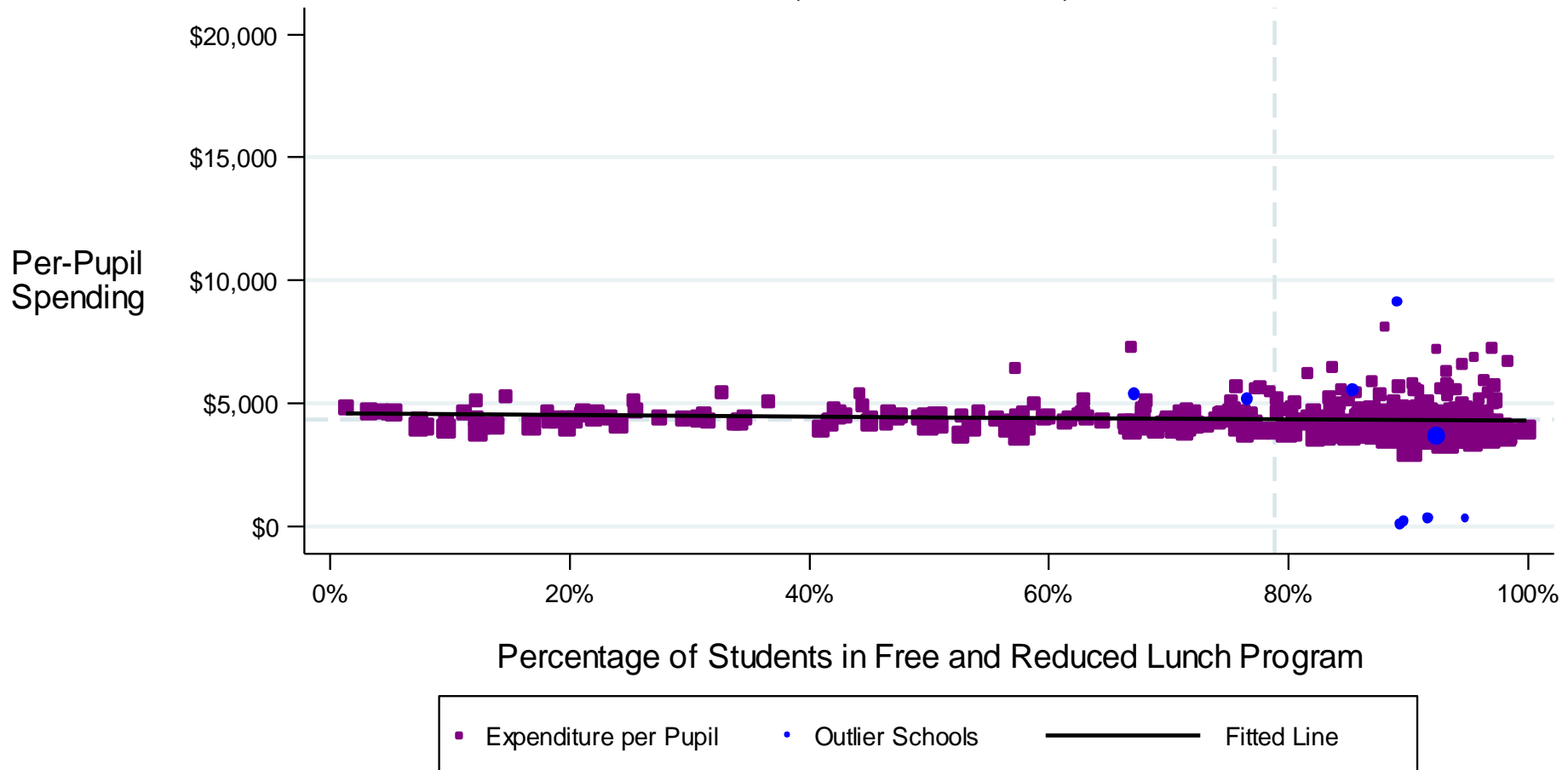
- Positive relationship between overall expenditures and poverty.
- Lots of variation around the fitted line.

Plot of Overall Spending Per Pupil by Percent Free and Reduced Price Lunch (FRL) Students for LAUSD Elementary Schools in 2009-10  
(463 Observations )



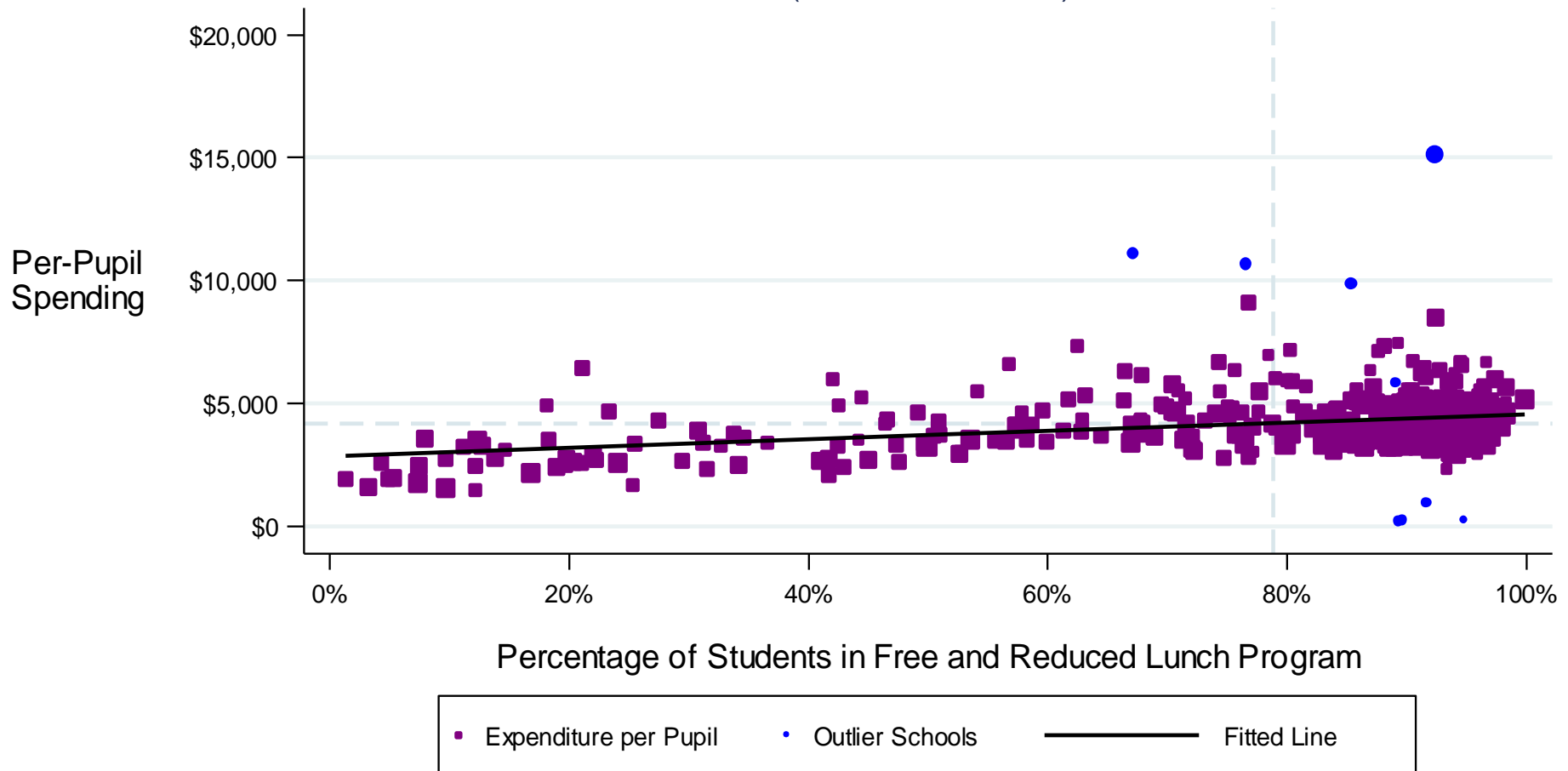
- Slight negative relationship between unrestricted expenditures and poverty.
- Most variation around the fitted line is among the highest poverty schools.

Plot of Unrestricted Spending Per Pupil by Percent Free and Reduced Price Lunch (FRL) Students for LAUSD Elementary Schools in 2009-10  
(463 Observations)



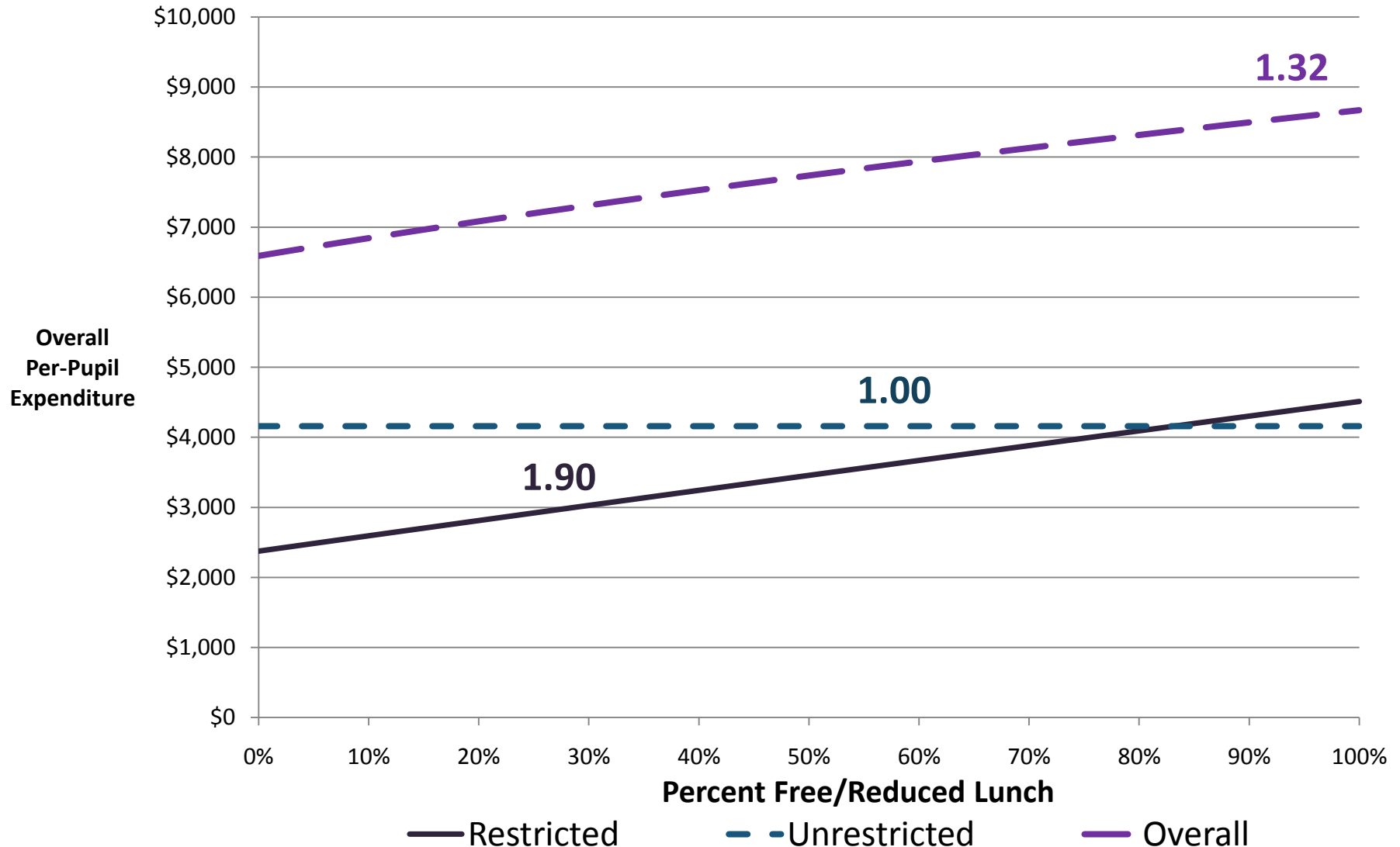
- Positive relationship between restricted expenditures and poverty.
- Lots of variation in spending around the fitted line.

Plot of Restricted Spending Per Pupil by Percent Free and Reduced Price Lunch (FRL) Students for LAUSD Elementary Schools in 2009-10  
(463 Observations )



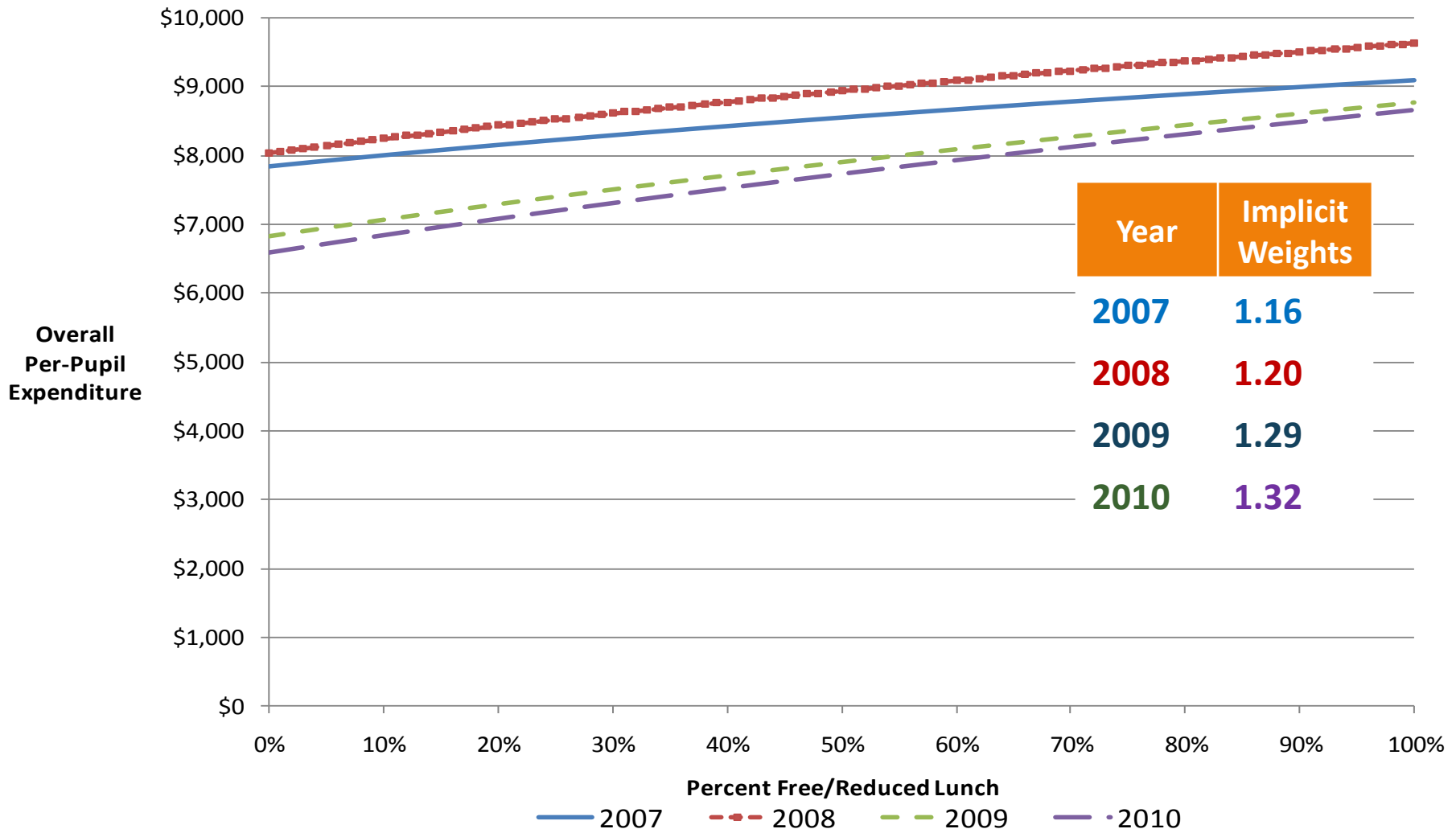
- Overall spending-poverty relationship is driven by variations in restricted expenditures

Predicted Overall, Restricted, and Unrestricted Per-Pupil Expenditure Across Percent Free/Reduced Price Lunch for LAUSD Elementary Schools (2009-10)

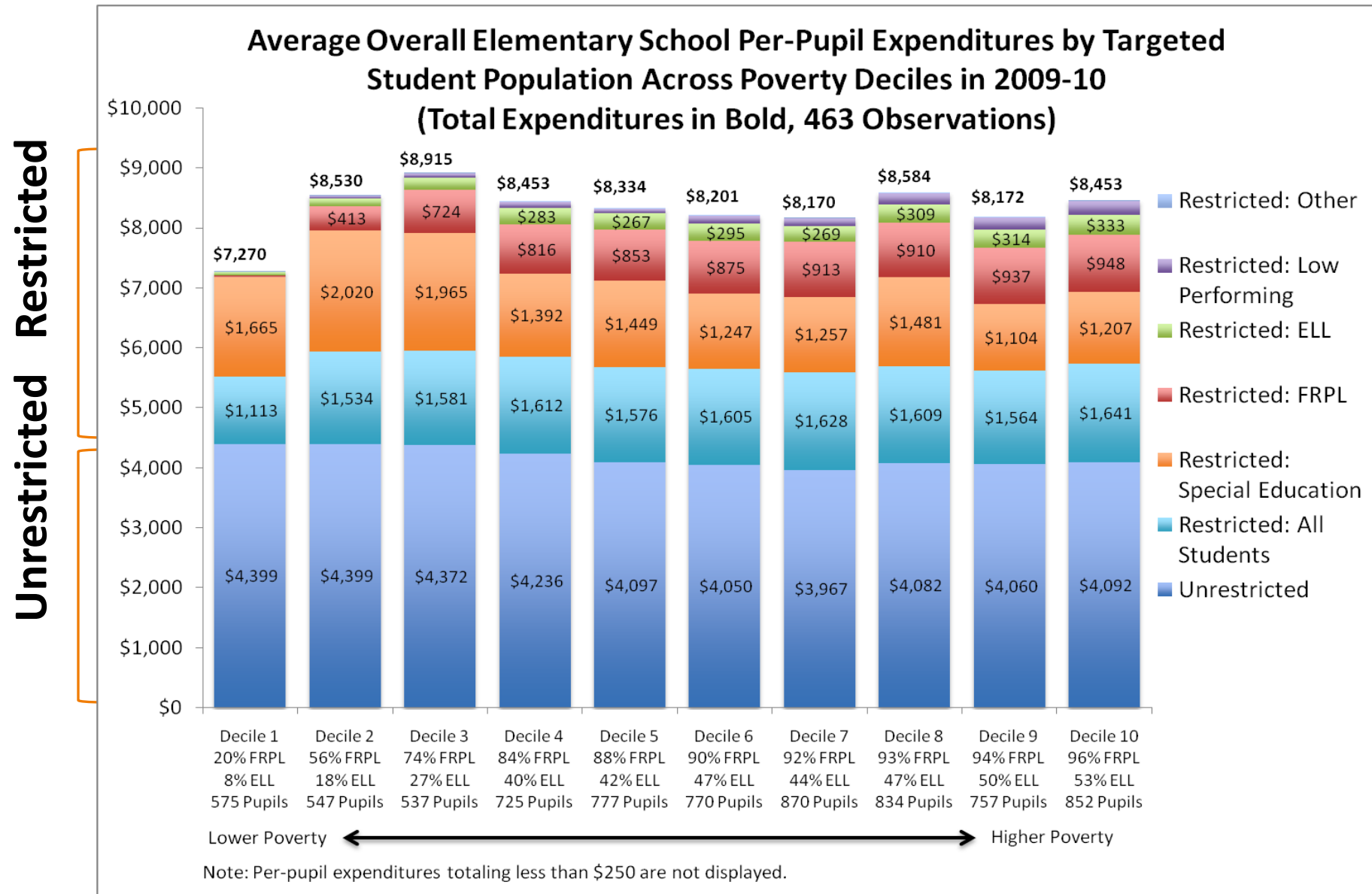


- Economic crisis has resulted in substantial decline in spending.
- Spending-poverty relationship has become stronger over time.

**Predicted Overall Per-Pupil Expenditure Across Percent Free/Reduced Price Lunch for LAUSD Elementary Schools (2006-07 to 2009-10)**



- Almost no variation in unrestricted expenditures.
- Substantial differences in restricted funds.



# **Introduction to Tools and Targeted Revenue Model**

# Overview of SSFR Tool Use Cycle

## **1- Targeted Revenue Model (TRM)**

District determines services and dollars to place under school discretion and equitably distributes resources to schools based on pupil needs.

District modifies TRM  
based on review of  
DBOM reports

Projected school-level  
budget caps forwarded  
to PBAR

## **3 - District Budget and Outcomes Management (DBOM)**

Reporting and monitoring based on current school spending and goal /budget data coupled with information on school outcomes

District establishes  
districtwide goals and  
provides accountability  
oversight and capacity  
building to schools

## **2 - Planning, Budgeting and Resource Allocation (PBAR)**

Schools set goals, develop strategies and specify staff/materials to achieve goals, and link budgeted dollars to revenue sources.

Finalized school-level  
goals, strategies and  
budgets forwarded to  
DBOM

# Targeted Revenue Model Agenda

- Benefits of the TRM
- Description of TRM Process
- Examples of TRM Output

# Benefits of the TRM

- **Problem** – Existing methods of distributing resources inhibit equity, efficiency and transparency.
- **Solution** – SSFR provides new tools to help overcome these limitations:
  - **Equity** gained by providing a per-pupil mechanism for distributing *dollars* to schools based on student needs.
  - **Efficiency** increased by giving schools control over the means to success.
  - **Transparency** achieved through simple-to-use model to calculate dollars available to each school.
- **Timely** – In the current unprecedented fiscal crisis SSFR tools help districts be more thoughtful in administering limited available funding.

# Targeted Revenue Model (TRM)

## Model Inputs

**Enrollments:** School-level Counts Overall and by Pupil Need Subpopulations

**Revenues:** Federal, State and Local by General Purpose and Restricted Categories



## Major District Decisions

1. Designate Status of Each Revenue Source (Lock, Unlock or School Grant)
2. Develop Foundation (Minimal Operational) Levels of Staff/Materials
3. Determine Level of School Discretion Over Revenues
4. Specify Allocations by Schooling-Level and Across Student Need Subpopulations



## Model Outputs

1. Simple Model of Per-Pupil Dollar Adjustments by Student Need
2. Pupil-Need Funding Weights
3. School-Level Projected Budgets (Overall and by Revenue Source)
4. Comparison of Projected Budgets to Current and Minimum Operational Budgets (MOB)
5. Calculation of Budget Adjustments Necessary to Provide Schools With MOB

# Example of TRM Per-Pupil Allocations

			Schooling-Level Allocations			Allocation Shares				Projected Total Dollars			
Resource Code	Resource Name	Per Pupil-Eligible Resources	Schooling Level	Schooling Level Allocation	School-Level Specific Amounts to Allocate	All	Poverty	EL	SE	All	Poverty	EL	SE
Unrestricted Resources													
0	Unrestricted	\$107,147,298	Elementary	55.0%	\$58,931,014	92.0%	8.0%	0.0%	0.0%	\$54,216,533	\$4,714,481	\$0	\$0
			Middle	15.0%	\$16,072,095	92.0%	8.0%	0.0%	0.0%	\$14,786,327	\$1,285,768	\$0	\$0
			High	30.0%	\$32,144,189	92.0%	8.0%	0.0%	0.0%	\$29,572,654	\$2,571,535	\$0	\$0
		\$107,147,298	\$107,147,298							\$98,575,514	\$8,571,784	\$0	\$0
										\$107,147,298			

Divide Projected Dollars by Pupil Counts to Generate Per-Pupil Dollars

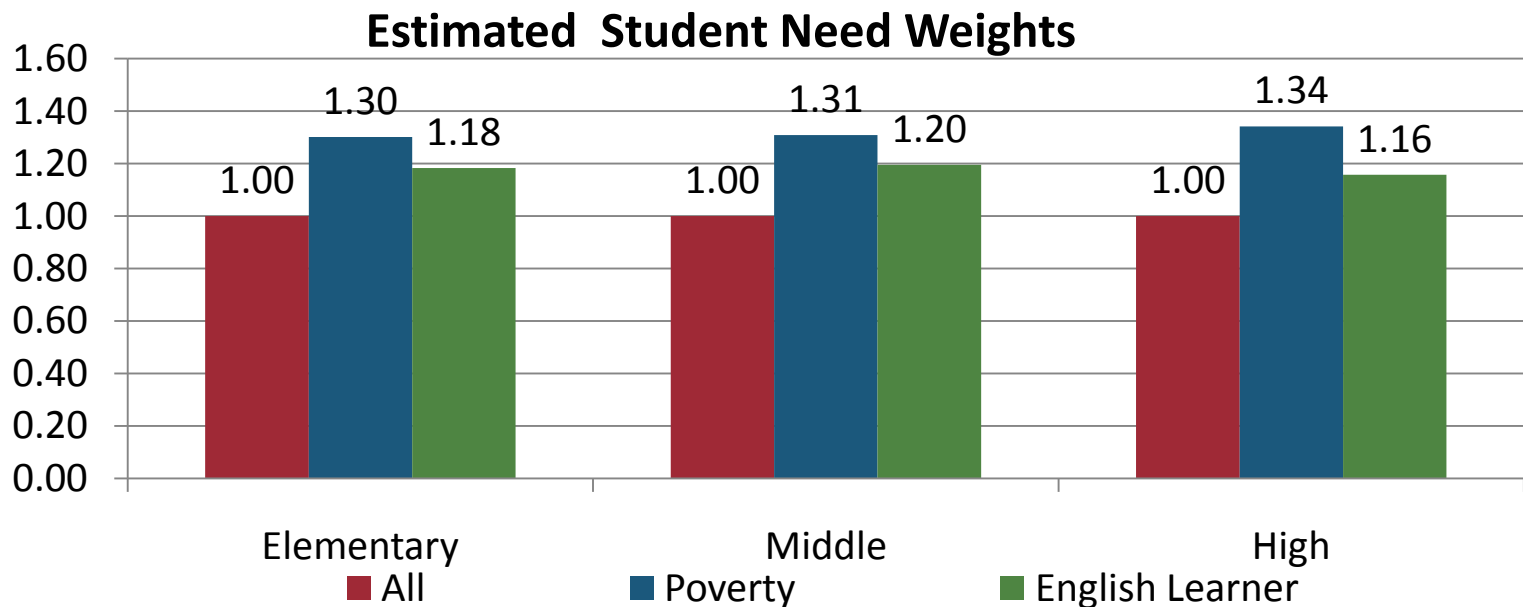
Schooling Level	Projected Per-Pupil Dollars			
	All	Poverty	EL	SE
Elementary	\$3,513	\$357	\$0	\$0
Middle	\$3,440	\$356	\$0	\$0
High	\$4,159	\$499	\$0	\$0

# Examples of TRM Output

- Transparent Per-Pupil Allocation Matrix (Per-Pupil Dollars by Schooling Level and Need Category).

<i><b>\$ Per-Pupil by Std Type</b></i>	<u>All</u>	<u>Poverty</u>	<u>English Learner</u>
Elementary Schools	\$3,741	\$1,129	\$686
Middle Schools	\$3,667	\$1,132	\$717
High Schools	\$4,683	\$1,602	\$736

- Student Need Weights



# **Planning, Budgeting and Resource Allocation (PBAR) Tool**

# Vital Questions PBAR Will Answer

BUDGET AUTONOMY – How are the dollars in my school budget spent?

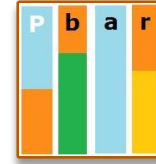
DISTRICT SUPPORT – What support is necessary from the central office to develop my school's budget?

INSTRUCTIONAL AUTONOMY – How can controls over resources at the site level effect instruction?

EQUITY – Are funds equitably allocated to schools within our district?

TRANSPARENCY – Do site level administrators understand how resources (staff, funds, etc.) are allocated ?

# Benefits of PBAR



Engages and includes both school leaders and community stakeholders in decision-making process

Explicitly connects district/school goals, strategies and resources

Fosters more thoughtful and innovative school planning process

Provides transparent information for district to monitor progress and provide planning/capacity building support if needed

Feeds into a knowledge base of school plans/budgets and outcomes

Provides school leadership with greater control

Focuses on the needs and usability of the 'End-User'



What do I want to accomplish?

How will I accomplish it?

How much does it cost to accomplish it?

Goals

Strategies

Costs

Priorities

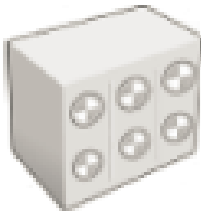
Best  
Practice

Resources

Most restrictive

Least restrictive

10011101001010101  
001010111001011011  
0101011010110011011



Current district system

## What Educators Do

## What the Tool Does

Assess last year	Compare benchmarked results against original goals
Set goals for this year	1. Align site goals with district/state/hierarchical goals
Create strategies for achieving this years goals	2. Prioritize Strategies by urgent /important
Estimate the cost of each strategy	Link strategized costs with district budget and procurement system
Budget against Resources (funding streams)	Aligns budgeted items to existing financial systems ( <i>proposed</i> )

Basic Information

Programs

Goals

Strategies

Costs

Resources

Budget

Reporting

Summary

Monitoring



The screenshot displays the Pivot Learning Partners / AIR website interface. At the top, there is a navigation bar with links: Basic Information, Programs, Goals, Strategies, Costs, Resources, Budget, Reporting, Summary, Monitoring, Administration, and Contact Us. Below the navigation bar, the page title is "Goal Tree for Site Plan: Levin 10-11". A note indicates that solid arrows can be used to expand or collapse goals and their strategies and costs, and that clicking on a goal, strategy, or action item will edit its contents. The main content area shows a list of goals and strategies. The first goal is "GATE: Increase the percentage of students being identified as eligible for participation in the Gifted & Talented and Education...". It has two strategies: "A1 - Ensure that all students in Grade 2 are tested for GATE eligibility: teachers will fill out applications for each Grade 2 student GATE Committee an..." and "A2 - Identifying Grade 4 and Grade 5 for Intellectual Achievement: Grades 4 and 5: GATE Committee and GATE Coordinator will review grades and testing res...". The second goal is "Math Goal: Our school-wide mathematics proficiency as measured by the AMO is 5%. The NCLB target for next year is 34...". It has four strategies: "A1 - 9 math teachers and four assistants", "B3 - Common conference periods for PBL team members.", "A1 - Create performance based assessments aligned to standards for benchmarking results on a quarterly basis", and "A2 - Initial assessment for placement of incoming freshmen." The third goal is "Our school-wide English/Language Arts proficiency as measured by the AMO is 67.5%....". It has six strategies: "A1 - Accelerate the performance of significant subgroups Prof/Adv CST ELA Subgroups 08-09 09-10 Change African- Amer...", "A1 - Decrease class size in order to provide a more personalized learning environment for students not making grade level standards", "A1 - Hire librarian 1/2 day-5 days a week.", "A2 - Implement Read180 as an intervention program targeting FBB, BB and B students", "A1 - Increase percentage of students in grades 2-11 scoring proficient or advanced on the CST in ELA", and "A1 - Increase the percentage of students moving from one performance band to another on the CST ELA (e.g., from FBB to BB; BB to Basic; Basic to Proficient...".

Goal Tree for Site Plan: Levin 10-11

- Click on the solid arrows below to expand or collapse Goals and their Strategies and Costs  
- Click on a Goal, Strategy or Action Item to Edit its contents

Sort by Strategy Name Sort by Strategy Priority Edit Goals Expand All Nodes

▼ GATE: Increase the percentage of students being identified as eligible for participation in the Gifted & Talented and Education...

- ▶ A1 - Ensure that all students in Grade 2 are tested for GATE eligibility: teachers will fill out applications for each Grade 2 student GATE Committee an...
- ▶ A2 - Identifying Grade 4 and Grade 5 for Intellectual Achievement: Grades 4 and 5: GATE Committee and GATE Coordinator will review grades and testing res...

▼ Math Goal: Our school-wide mathematics proficiency as measured by the AMO is 5%. The NCLB target for next year is 34...

- ▶ A1 - 9 math teachers and four assistants
- ▶ B3 - Common conference periods for PBL team members.
- ▶ A1 - Create performance based assessments aligned to standards for benchmarking results on a quarterly basis
- ▶ A2 - Initial assessment for placement of incoming freshmen.
- ▶ A2 - New pacing guide based on year long 55 minute class period as opposed to block schedule.
- ▶ A1 - School wide tutoring program offered to all students during non classroom time.
- ▶ A2 - Spring teachers from classes 2 days in spring 2011 to observe and meet with successful math teachers at 2 neighboring schools.
- ▶ C1 - Utilize common pacing plan, five common assessments, and final for the each course.

▼ Our school-wide English/Language Arts proficiency as measured by the AMO is 67.5%....

- ▶ A1 - Accelerate the performance of significant subgroups Prof/Adv CST ELA Subgroups 08-09 09-10 Change African- Amer...
- ▶ A1 - Decrease class size in order to provide a more personalized learning environment for students not making grade level standards
- ▶ A1 - Hire librarian 1/2 day-5 days a week.
- ▶ A2 - Implement Read180 as an intervention program targeting FBB, BB and B students
- ▶ A1 - Increase percentage of students in grades 2-11 scoring proficient or advanced on the CST in ELA
- ▶ A1 - Increase the percentage of students moving from one performance band to another on the CST ELA (e.g., from FBB to BB; BB to Basic; Basic to Proficient...
- ▶ A2 - Introduce new spelling bee documents to all ELA grades
- ▶ A2 - Purchase Voyager materials to supplement the core instructional materials in the classrooms
- ▶ A1 - Staff development and professional collaboration
- ▶ A1 - www.lexia.com

Goal Tree Page

Basic Information

Programs

Goals

Goals are set and monitored from one screen

Strategies

Costs

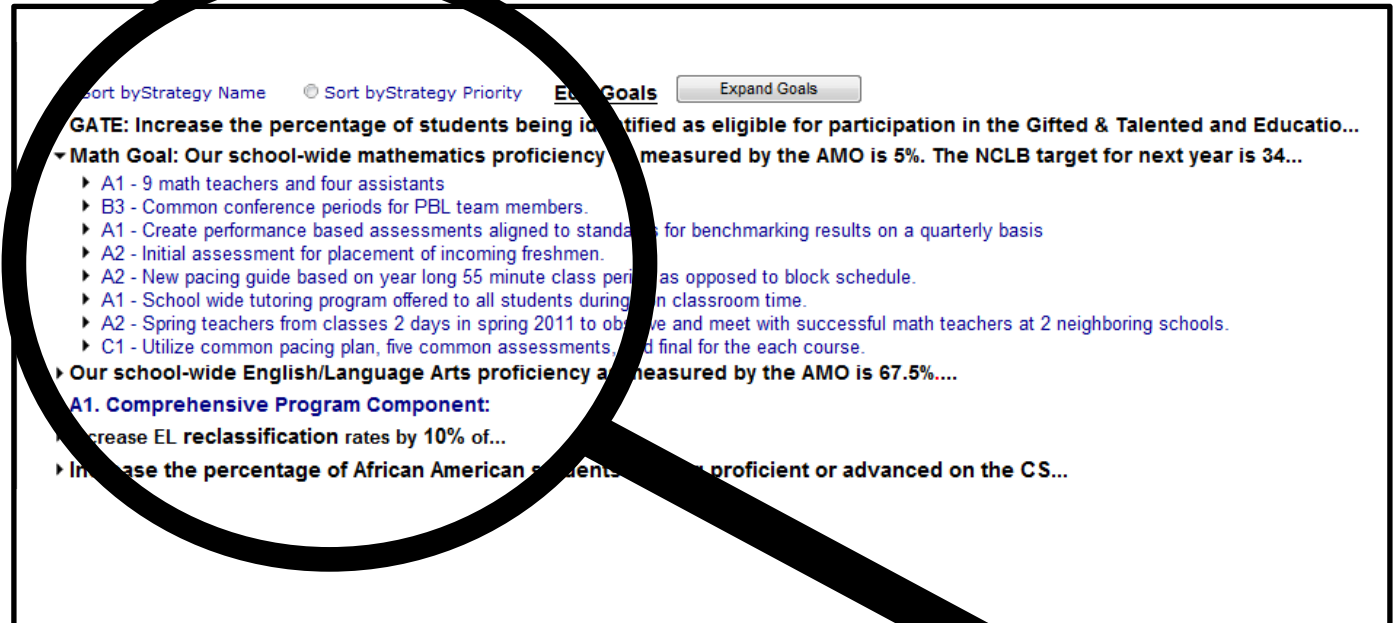
Resources

Budget

Reporting

Summary

Monitoring



The screenshot displays a web interface for managing educational goals. At the top, there are sorting options: 'Sort byStrategy Name' and 'Sort byStrategy Priority', followed by a tab labeled 'Goals' and a button 'Expand Goals'. The main content area lists several goals. A large magnifying glass is positioned over the 'Math Goal' section, which details a school-wide mathematics proficiency goal measured by the AMO, with a current value of 5% and a target of 34%. Below this, a list of strategies (A1, B3, A1, A2, A2, A1, A2, C1) is provided, each with a brief description of the action plan. Other visible goals include one for English/Language Arts proficiency (67.5%) and one for increasing EL reclassification rates by 10%.

Sort byStrategy Name   Sort byStrategy Priority   **Goals**   Expand Goals

**GATE: Increase the percentage of students being identified as eligible for participation in the Gifted & Talented and Educatio...**

▼ **Math Goal: Our school-wide mathematics proficiency measured by the AMO is 5%. The NCLB target for next year is 34...**

- ▶ A1 - 9 math teachers and four assistants
- ▶ B3 - Common conference periods for PBL team members.
- ▶ A1 - Create performance based assessments aligned to standards for benchmarking results on a quarterly basis
- ▶ A2 - Initial assessment for placement of incoming freshmen.
- ▶ A2 - New pacing guide based on year long 55 minute class period as opposed to block schedule.
- ▶ A1 - School wide tutoring program offered to all students during open classroom time.
- ▶ A2 - Spring teachers from classes 2 days in spring 2011 to observe and meet with successful math teachers at 2 neighboring schools.
- ▶ C1 - Utilize common pacing plan, five common assessments, and final for the each course.

▶ **Our school-wide English/Language Arts proficiency as measured by the AMO is 67.5%....**

**A1. Comprehensive Program Component:**

- ▶ Increase EL reclassification rates by 10% of...
- ▶ Increase the percentage of African American students who are proficient or advanced on the CS...

Basic Information

Programs

Goals

Strategies are tied to goals and aligned to priorities

Strategies

Costs

Resources

Budget

Reporting



Summary

Monitoring

The screenshot displays the 'Strategies' section of the Pivot Learning Partners AIR system. At the top, the Pivot Learning Partners logo and the AIR logo are visible. A navigation bar includes links for Basic Information, Programs, Goals, Strategies, Costs, Resources, Budget, Reporting, Summary, Monitoring, Administration, and Contact Us. The 'Strategies for Site Plan' is set to 'Levin 10-11', and the 'Edit Strategies for Goal' is set to 'MATH'. The 'Goal Text' section describes a math proficiency goal for the school, referencing the AMO target and NCLB requirements. Below this is a table of strategies with columns for Strategy, Priority, State Strategy, and Staff?.

	Strategy	Priority	State Strategy	Staff?
⊕	9 math teachers and four assistants	A1 Important and Urgent: Next 3 months	Alignment of content	Yes
⊕	Common conference periods for PBL team members.	B3 Needed	PD	Yes
⊕	Create performance based assessments aligned to standards for benchmarking results on a quarterly basis	A1 Important and Urgent: Next 3 months	Impv Strategies	Yes
⊕	Initial assessment for placement of incoming freshmen.	A2 Important not Urgent: Next 6 months	Monitoring prgms	No
⊕	New pacing guide based on year long 55 minute class period as opposed to block schedule.	A2 Important not Urgent: Next 6 months	Alignment of content	No
⊕	School wide tutoring program offered to all students during non classroom time.	A1 Important and Urgent: Next 3 months	Alignment of content	Yes
⊕	Spring teachers from classes 2 days in spring 2011 to observe and meet with successful math teachers at 2 neighboring schools.	A2 Important not Urgent: Next 6 months	Impv Strategies	Yes
⊕	Utilize common pacing plan, five common assessments, and final for the each course.	C1 Desired This School Year	Alignment of content	No
+		A1 Important and Urgent: Next 3 months	Alignment of content	Yes

## Monitoring

Basic Information
Programs
Goals
Strategies
Costs
Resources
Budget
Reporting
Summary
Monitoring
Administration
Contact Us

Costs for Site Plan: **Levin 10-11**

Edit Staffing for Goal: A NEW GOAL

Edit Staffing for Strategy: All

LAUSD Program: 
Download Data Entry

The selected program has no staffing line items.

Materials Allocation
Staffing Allocation
Entire Budget
Spending Graph

Line Type	Goal	Item	Description	Function	Start Date	End Date	Hour/Day								
			<b>Action Item</b>	<b>Program</b>	<b>Line Type</b>	<b>Bud Item</b>	<b>Bud Description</b>	<b>Goal</b>	<b>Funct</b>	<b>Start Date</b>	<b>End Date</b>	<b>Hr/Day</b>	<b>Day/Wk</b>	<b>Fund Pct</b>	<b>Total Cost</b>
④	A)		identify work space and equipment for VISTA	14168	2OTHER	11087	COUNS SEC X TIME	7110	2420	07-01-2011	12-31-9999	6.000	5.000	50.000	\$890.89
④	A)		identify work space and equipment for VISTA	14310	1POSITN	10227	INSTRL COACH SEC B1T	4760	2420	07-01-2011	12-31-9999	3.000	5.000	100.000	\$53,725.00
④	A)		identify work space and equipment for VISTA	7N178	1POSITN	11891	CSR TCHR ELEM G3 3TK	4760	8100	07-01-2011	06-30-2012	6.000	5.000	100.000	\$87,134.00
④	A)		identify work space and equipment for VISTA	7N539	1POSITN	10238	INST COACH E LITMTC3	3800	8500	07-01-2011	06-30-2012	3.000	5.000	100.000	\$43,568.00
④	A)		identify work space and equipment for VISTA	7S046	1POSITN	10229	INSTRL COACH SEC B4T	5770	2700	07-01-2011	06-30-2012	6.000	5.000	100.000	\$93,446.00
④	A)		identify work space and equipment for VISTA	7S046	1POSITN	10600	TCHR AST DEG TK NW/1	1110	1000	07-01-2011	06-30-2011	4.000	5.000	100.000	\$8,412.00
④	D)		devise a method for sending home regular parent surveys in English and Spanish (web-based, paper&pencil). Set up a survey schedule for obtaining regular family and community input.	7S046	1POSITN	10600	TCHR AST DEG TK NW/1	1110	1000	07-01-2011	06-30-2011	5.000	5.000	100.000	\$10,515.00
<b>Subtotal:</b>								<b>\$297,690.89</b>							

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Costs are separated into 'Staff and **Stuff**'

**Costs for Site Plan: Levin 10-11**

Edit Materials for Goal:

Edit Materials for Strategy:

LAUSD Program:

**Materials Allocation** | **Staffing Allocation** | **Entire Budget** | **Spending Graph**

Line Type	Goal	Item	Description	Function	Start Date	End Date	
<input type="text" value="7S046"/>	<input type="text" value="2OTHER"/>	<input type="text" value="12105"/>	<input type="text" value="ITIN PSYCH SOC WKR B"/>	<input type="text" value="1110 3110"/>	<input type="text" value="07/01/2011"/>	<input type="text" value="06-30-2011"/>	<input type="text" value="0.000"/>

Program	Line Type	Bud Item	Bud Description	Goal	Funct	Start Date	End Date	Fund Pct	Total Cost
7S046	2OTHER	12105	ITIN PSYCH SOC WKR B	1110	3110	07-01-2011	06-30-2011	100.000	\$20,708.00

**Subtotal: \$20,708.00**

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Resources are sorted from most restrictive to least restrictive







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Resources for Site Plan:

Levin 10-11

	<a href="#">Header</a>	<a href="#">Resource Name</a>	<a href="#">Description</a>	<a href="#">Sort Order</a>	<a href="#">Funding Agent</a>	<a href="#">Amount</a>	
⊕	QEIA	Quality Education Investment Act (QEIA)	Quality Education Investment Act (QEIA)	2	District	\$322,986.00	✂
⊕	SGC	School Governance Council (SGC)	School Governance Council (SGC)	3	District	\$54,476.00	✂
⊕	Title III	Title III English Language Acquisition, Language E	Title III English Language Acquisition, Language Enhancement, and Academic Achievement	4	District	\$456,672.00	✂
⊕	(EIA-LEP)	English Learners Programs (EIA-LEP)	English Learners Programs (EIA-LEP)	4	Federal	\$88,740.00	✂
⊕	Title I	Title I	Title I Targeted Assistance School (TAS)	1	District	\$348,885.00	✂
⊕	GF Unrestr	Middle School Per Pupil	Allocation (Rate x Enrollment x Att Rate) - Adjustments = Total School Allocation Revenue Rate = \$3,694 Enrollment = 1,206 Att Rate = 91.61% Cost Center Allocation = \$4,081,193 Adjustments Rate = \$367.96 Enrollment = 1,206 Adjustments = \$406,529 \$4,081,193 - \$406,529 = \$4,487,721	5	Federal	\$4,487,721.00	✂
+					District ▼		

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Staffing Allocation

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Spending Graph

		Title I	QEIA	SGC	Title III	(EIA-LEP)	GF Unrestr	
		\$348,885	\$322,986	\$54,476	\$456,672	\$88,740	\$4,487,721	

Goal Name	Est. Cost							Remaining
ELA	\$6,108.00	80,000.00	0.00	0.00	4,000.00	45,000.00	3,467.00	(\$126,359.00)
MATH	\$31,223.00	0.00	0.00	0.00	9,000.00	0.00	0.00	\$22,223.00
CLIMATE	\$0.00	28,000.00	0.00	5,400.00	27,899.00	0.00	10,000.00	(\$71,299.00)
SITE	\$12,237.00	0.00	0.00	0.00	0.00	0.00	4.00	\$12,233.00
A NEW GOAL	\$354,969.00	0.00	5,000.00	0.00	0.00	0.00	0.00	\$349,969.00
SPED	\$0.00	0.00	0.00	0.00	0.00	0.00	0.00	-
AMAO 1	\$6,108.00	4,500.00	0.00	1,608.00	0.00	0.00	0.00	-
AMAO 2	\$0.00	0.00	100,000.00	0.00	0.00	0.00	40,000.00	(\$140,000.00)
History	\$95,314.00	0.00	0.00	0.00	0.00	0.00	0.00	\$95,314.00
Science	\$90,953.00	0.00	0.00	0.00	0.00	0.00	0.00	\$90,953.00
EL	\$16,623.00	0.00	0.00	0.00	0.00	0.00	0.00	\$16,623.00
AMAO 3	\$0.00	0.00	0.00	0.00	0.00	0.00	0.00	-
PI	\$0.00	10,980.00	0.00	0.00	0.00	0.00	43,000.00	(\$53,980.00)
GATE	\$8,412.00	0.00	0.00	0.00	0.00	0.00	0.00	\$8,412.00
Athletics	\$10,515.00	0.00	0.00	0.00	0.00	0.00	0.00	\$10,515.00
Goal Area not specified	\$0.00	0.00	0.00	0.00	0.00	0.00	0.00	-
INCREASE ACADEMIC PERFORMANCE FOR BOYS	\$0.00	0.00	0.00	0.00	0.00	0.00	0.00	-
Matriculation	\$0.00	0.00	0.00	0.00	0.00	0.00	0.00	-
Goal Totals Allocated		\$123,480	\$105,000	\$7,008	\$40,899	\$45,000	\$96,471	
Totals Allocated - Materials		\$43,480	\$5,000	\$1,608	\$13,000	\$0	\$46,467	
Totals Allocated - Staffing		\$80,000	\$100,000	\$5,400	\$27,899	\$45,000	\$50,004	
Remainder		\$225,405	\$217,986	\$47,468	\$415,773	\$43,740	\$4,391,250	

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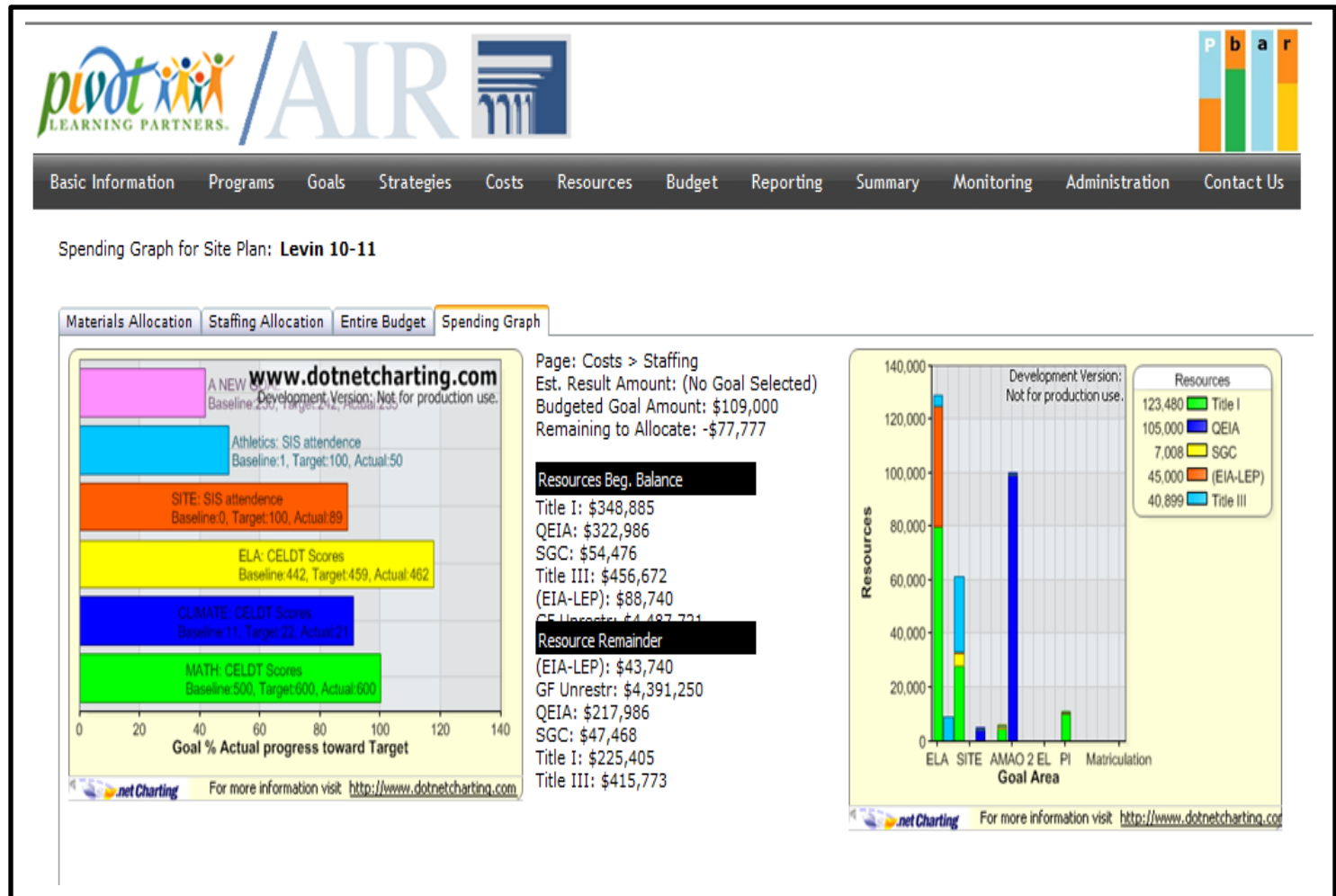
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# Next Steps and Discussion

- Develop “Industrial” Version of TRM
- Complete Development of PBAR
- Build District Budget and Outcomes Management (DBOM) Tool
- Interface Tools With District Information Systems
  - Student Demographics
  - Student Assessment/Outcomes
  - Fiscal/Payroll Data
  - Other Existing Data and Reporting Systems
- Seek Opportunities to Apply Tools in New Districts

# Thank You!

[www.schoolfundingforresults.org](http://www.schoolfundingforresults.org)

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## QUESTIONS?