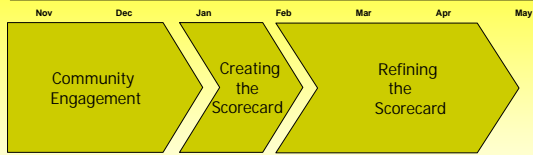


School Governance for Parents: School Budget Basics

Reviewing, managing, and aligning your school site budget with the Balanced Scorecard.



Balanced Scorecard Timeline for 2008-09



- Define the goals.
- Gather and review data.
- Consider new activities and measures.
- Align activities and measures to the key objectives.
- 1st draft is due January 30.
- Keep engaging the community.
- Analyze feedback from the community and the central office.
- Final Balanced Scorecard is due April 30.
- Revise and improve the scorecard. Continuous improvement!



Topics

- Weighted Student Formula (WSF)
- Unrestricted v. Restricted funds
- Questions for SSC Members to Ask
- Tips for Developing a Budget
- Panel Discussion



Weighted Student Formula (WSF)

- What is it?
 - A way to move funds – and decision-making – from the central District office to the school sites
- How is our school's WSF amount calculated?
 - Enrollment by grade level
 - Enrollment of students with special characteristics

In short, the dollars follow the children.



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Weighted Student Formula (WSF)

- How do we know how much we'll get?
 - District provides a projection in the spring.
 - Actual amounts may be adjusted in the fall.



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Elementary School A
Preliminary Weighted Student Formula and Consent Decree Allocation for SY 2007-08

Grade Levels	Enrollment					Special Education Enrollment				
	Total Enrollment	LTMS	Dep. Pres.	Sp. Ed. Trans.	Total	SPED	SPED-MS	SPED-S	Total	
Kindergarten	80	21	21	21	25	1	1	2		
Primary (K-2)	275	82	36	120	87	12	5	17		
Intermediate (3-5)	227	28	12	38	71	12	5	17		
Middle School (6-8)										
High School (9-12)										
Total	582	131	70	189	383	25	11	36		

Allocation of Dollars Based on State Funding Factor of \$2,261.19

Grade Levels	Main Education					Special Education Dollars				
	LTMS	Dep. Pres.	Sp. Ed. Trans.	Total	SEB	SPED	SPED-MS	SPED-S	Total	
Kindergarten	\$ 201,000			\$ 201,000	\$ 506,224	\$ 27	\$ 11	\$ 34	\$ 72	
Primary (K-2)	\$ 624,522			\$ 624,522	\$ 1,463,024	\$ 321	\$ 135	\$ 376	\$ 832	
Intermediate (3-5)	\$ 508,800			\$ 508,800	\$ 1,219,680	\$ 182	\$ 75	\$ 213	\$ 470	
Middle School (6-8)										
High School (9-12)										
Total Student Allocation	\$ 1,334,322	\$ 272,800	\$ 7,800	\$ 1,614,922	\$ 2,290,528	\$ 230	\$ 95	\$ 283	\$ 608	
Foundation Allocation					\$ 719,000					
Three Year Funds										
Total Weighted Student Formula Allocation (including Special Education)					\$ 2,389,528				\$ 608	

Consent Decree Allocation: \$ 25,827



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Weighted Student Formula (WSF)

- How can our school spend WSF funds?
 - Fund the Core Program first.
 - 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 Balanced Scorecard.



Unrestricted v. Restricted Funds: Sources

- Unrestricted funds:
 - Most unrestricted funds come from WSF
- Restricted funds:
 - Restricted funds come from various sources:
 - Federal or State grants
 - Local grants



Elementary School B Preliminary Allocations SY 2007-2008	
Funding Source	Site Amount
WSF	\$ 2,474,418
WSF Special Ed	\$ 7,437
Consent Decree	\$ 253,345
Tab 1	\$ 147,020
SCE	\$ -
LEP	\$ 73,932
SP	\$ 82,465
	\$ 3,039,615
Other Local Funding Sources	
Proposition H Arts	\$ 9,342
Proposition H Sports	\$ -
Proposition H Libraries	\$ -
	\$ 9,342
New State Funding Sources	
Art, Music, & PE Education Equipment*	\$ 23,642
Instructional Materials, Library & Technology*	\$ 746,944
Discretionary Block Grant (preparing 20%)	\$ 11,018
	\$ 42,314
Grand Total	\$ 3,085,270

*One-time funding, but can be carried over from year to year

WSF and the Discretionary Block Grant provide the school site with unrestricted funds.



Questions for SSC Members to Ask

For next year's budget:

- What are our school's strengths and weaknesses?
- What should our priorities be for next year?
- How can we spend our money to support these priorities?



Tips for Developing a Budget

- Make sure the budget directly supports the priorities identified in the Balanced Scorecard.
- Confront tough choices
 - Prioritize all non-Core Program spending options
 - Be honest about the tradeoffs
 - 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!



Think – Write–Pair – Share

- What are some questions you'd like to ask about your school's budget?
- Take a moment to think, write it down, then find a partner to share your question with.
- Be ready for a question and answer session!



Question and Answer Session



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Thank You

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