BACK TO $TUDENTS

Student-Based Budgeting Principal Handbook

SY2018-19 BUDGETING PROCESS

SHELBY COUNTY SCHOOLS

Contents

Introduction to SBB 2
Letter from Superintendent 2
Using the SBB Handbook 3
Budget Development and Staffing Calendar 3
Five Key SBB Takeaways 4
SBB Formula & Policies 4
- SBB Pool vs. Non-SBB Pool (a.k.a. Locked and Special Fund Allocations) 4
- Weight Characteristics and Amounts 5
- Enrollment Projections and Fall Adjustments 8
- Baseline Services and Baseline Supplement 8
- SCS Staffing Supplement 10
- Transition Hold Harmless Policy 10
- Q&A: Enrollment and Transition Policy under SBB 12
  - How does enrollment impact my budget? 12
  - But what about the Transition Policy? Isn't there a loss limit or gain limit? 12
  - Why am I paying a "transition tax" or receiving a "transition subsidy"? 13
  - How does this all come together? 13
- Average Salary & Benefits – SBB Pool Only 14

Resource Flexibility for Empowered Schools 15
Academics Guidance 17
Budget Check-Out (Traditional Schools) 20
- Pre-Work 20
- During Budget Check-Out 20
- Follow-Up 20

Budget Check-Out (Cohort/Early Adopter Schools) 25
- Pre-Work 25
- During Budget Check-Out 25
- Follow-Up 25

Questions? 30

Introduction to SBB

"Student-Based Budgeting" (SBB) is a funding model that allocates dollars (instead of staff) to schools based on the number of students enrolled. The model is weighted using objective, measurable facts about each individual student that drive education costs. In simplest terms, with SBB, dollars follow the student, based on each student's need. Furthermore, schools may be able to earn more flexibility in deciding what to do with those funds once they reach the school. We believe that schools, alongside their ILDs, will work from similar starting points to build increasingly diverse and customized plans. The purpose of a school's budget, then, is to support and reflect its academic plan.

Letter from Superintendent

Colleagues,

Shelby County Schools is committed to supporting the success of each and every student we serve. Ensuring all schools can provide its students access to an equitable education is part of our commitment to this success.

In order to give every student at every school an opportunity to excel and make the welfare of all students the focus of every financial decision, SCS is ensuring all resources are sent "Back 2 Students" through student-based budgeting and school-level budget planning.

"Back 2 Students" provides an equitable distribution of funds by student enrollment numbers and needs, and so our school leadership teams, not central office, can decide how most of the money is spent in order to improve student achievement. Our school leaders will have the flexibility to design solutions unique to the needs of their students and strategically allocate funds in order to implement them.

We realize that adequate structure and support for our school leaders are critical for the success of our new funding method so, starting this year, leadership teams at only six cohort schools, who have already received extensive budget training, will have the flexibility to make school-based budget allocation decisions for the 2018-19 school year. Over the next few years and following intense training and an application process, the District will slowly provide that decision-making power to more schools.

The ultimate goal is to give all school leadership teams the autonomy to the make most of their budgetary decisions. Removing the top-down budget management eliminates one-size-fits-all approaches and promotes the adoption of innovative solutions that are specific to each school's needs.

SCS is committed to being deliberate and strategic about aligning school funding with the needs of our schools and ultimately "Back 2 Students."

Thanks for your continued support of our schools and, most importantly, our students.

Dorsey E. Hopson, II
Superintendent

Using the SBB Handbook

The SBB Design Team, which includes principals, central services staff, and SCS senior leadership, worked together over the course of many months to draft and revise the recommendations found in this SBB handbook for principals. This reference exists to help readers understand:

- How school budget allocations are calculated.
- What the criteria are for empowerment in SY19-20 and beyond.
- What flexibilities are available for empowered schools.
- What boundaries and guardrails are in place for schools during the budgeting and design process.
- What structures are in place for schools to receive support.

This document does not replace the expertise and problem-solving support offered by your ILD, budget advisor, HR business partner, or other central services department contacts, instead, it will establish a common fact base upon which you and your team may craft a school plan and budget suited to the unique needs of your students.

This is a living document, a product of continuous improvement. Please make sure you are always referencing the most updated version found on SCS website. Do not rely on an archived copy that you downloaded.

Budget Development and Staffing Calendar

Date	*Description*
Mon, 2/19/2018	SBB Workbooks distributed to all schools
Tue 2/20, Wed 2/21, Thu 2/22/2018	SBB Sessions for Principals
Mon 2/26/2018 -- Tue 3/6/2018	Budget Check-Out for Traditional Schools
Wed 3/7/2018 –Thu 3/9/2018	Budget Check-Out for Cohort/Early Adopter Schools
To Be Determined	Transfer Period
No Later Than Weds 3/14	Approved positions posted
No Later Than 3/29	Positions earmarked for external hiring identified

Five Key SBB Takeaways

1. **Why is SCS implementing SBB?**
   - To improve the equity, transparency, and flexibility of its school funding system.
   - In Year 1 of implementation, only cohort/EA schools will have flexibility over resources.

2. **What is Student-Based Budgeting (SBB)?**
   - Under SBB, dollars follow students based on student need.
   - For cohort/EA schools, District allocates dollars (i.e., instead of staff) to schools based on the SBB formula and principals have flexibility to develop budget/staffing plan to address their school's urgent and specific needs.
   - For traditional schools, District allocates dollars to schools based on the SBB formula and then applies the staffing formula to determine appropriate budget/staffing for the school. Principals do not have any new flexibilities this year.

3. **SBB allocations are only one part of a school's budget. Schools also get locked resources (i.e., ELL, SWD, etc.) and special fund allocations (i.e., Title I)**
   - SBB allocations are also known as "unlocked" resources (i.e., unlocked = cohort/EA schools have flexibility)

4. **SCS anticipates declining enrollment next year. Because overall enrollment is declining, the District's overall funding is decreasing and as a result, schools with declining enrollment will see a decrease in their funding. This has nothing to do with the transition to SBB.**

5. **This handbook is your one-stop guide to all things related to SBB. Read on for more information.**

SBB Formula & Policies

In one sense, Student-Based Budgeting is very simple: the money follows the student, period. But while this basic principle drives almost every aspect of our new school funding system, there are a handful of other details needed to fully understand how SBB works. In this chapter, you'll find a complete explanation of how Student-Based Budgeting works in Shelby County Schools. With this information in hand, you should be able to explain exactly why your budget total is what it is, and where it came from.

SBB Pool vs. Non-SBB Pool (a.k.a. Locked and Special Fund Allocations)

SBB is the District's primary mechanism for allocating resources to schools, but it is not the only method. Each school will receive most of its dollars through Student-Based Budgeting; empowered schools will have discretion to spend those dollars within a set of boundaries and non-empowered schools will use those dollars to purchase their staffing allocations dictated by district staffing ratios. In addition, as in the past, each school will also receive an additional set of staff FTEs and supplies according to the

District's objectives (a.k.a. Locked Allocations) and receive may certain grant dollars (e.g. Title I, SIG Grant) according to the terms of the grant (a.k.a. Special Fund Allocations).

SBB Pool: The total dollar sum that goes directly through Student-Based Budgeting is known as the **SBB Pool**. How big is the pool? It's the sum total of all the resources that schools are responsible for budgeting.

For example, if schools were only responsible for budgeting for teachers, secretaries, and pencils, and the total cost of teacher compensation was $150M, secretaries $15M, and pencils $100K, the size of the SBB Pool would be $150M + $15M + $100K = $161.1M.

Based on the set of resources that schools will budget in SY18-19, the size of the pool is $379M. You'll find more detail on which resources are allocated and managed by schools, and therefore make up this pool, in the section on resource flexibility.

Special Fund Allocations: As in previous years, schools will continue to receive some dollars from state and federal grants (e.g. Title I Allocations, SIG Grants, etc.). These dollars are considered "outside of the pool" and do not "follow the student," but schools often do have control over spending them, depending on the terms of the grant. Schools have the flexibility to seek additional grants.

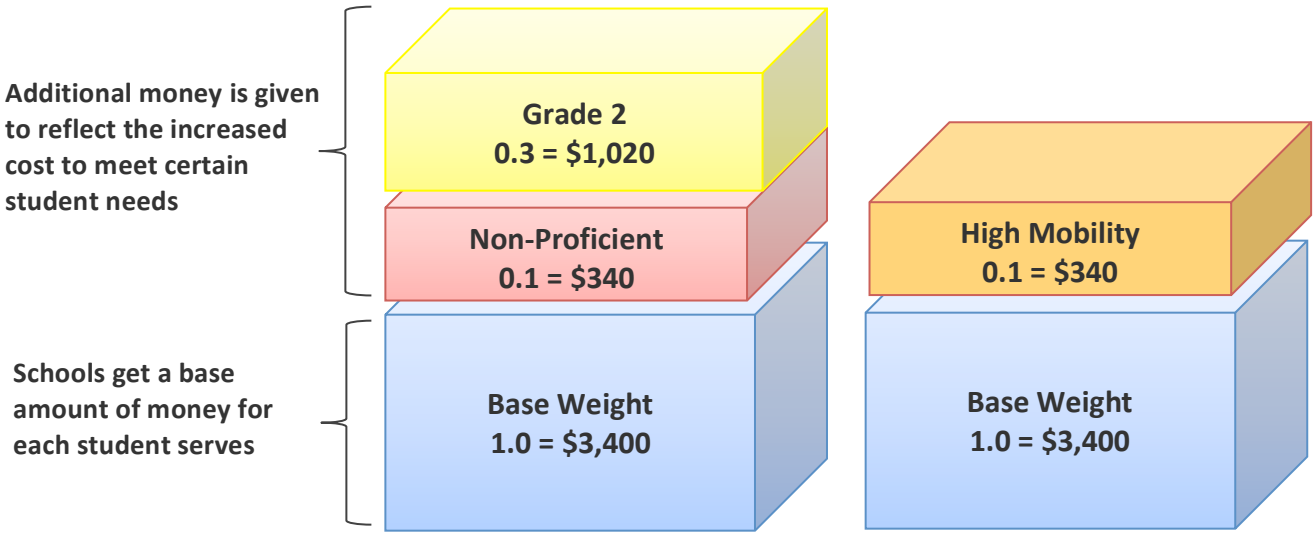
Locked Allocations: Also, as in previous years, schools will receive certain staff FTEs, equipment, and materials according to the District's support plan (e.g. social workers, custodians, special ed staff, etc.). Those staff, equipment, and materials that schools are not responsible for budgeting will be allocated to buildings according to the decisions made by their department. Please find more detail on what flexibility applies to each individual resource type in the section on resource flexibility.

Type of Resource	In the SBB Pool?	Follows the student?	Empowered schools choose how to spend?
SBB Pool Dollars	Yes	Yes	Yes
Special Fund Allocations	No	Depends on the grant terms	Sometimes
Locked Allocations	No	No	No

Weight Characteristics and Amounts

The dollars in the SBB Pool "follow the student." At its most basic level, this would mean taking the $379M in the SBB Pool, dividing by 91,438 students, and sending $4,118 to each school for every single student on its roster. But a key piece of our strategy is the belief that it costs a different amount of money to provide an appropriate education for different types of students. Accordingly, we don't allocate the same $4,118 for every student; instead, we use objective, measurable criteria to target more resources for certain students who we know need more help to learn, and therefore to schools with the neediest populations. These dollars are assigned as "categorical weights."

The money a school receives on behalf of each student is the sum of the "base weight"—an amount that each student receives—and all special categorical weights for which the student qualifies. In the example below, both students receive the base weight, and each receives a different set of need weights according to their respective attributes.



Through investigating multiple years of student achievement data, the SBB Design Team recommended a set of student characteristics that the District should prioritize in directing extra resources to the highest need schools. The design team looked for characteristics that were:

- **Relevant**: The characteristic must represent a real student need that demands more resources to educate.
- **Measurable**: The characteristic must be indisputably and objectively measurable, so we can all agree on which students qualify for it.
- **Student-Based**: The characteristic must be linked to an individual student, not a school's decisions, such that any student will trigger the same funding level regardless of which school he or she attends. For this reason, the Design Team chose "incoming" student characteristics (e.g. 8th grade performance for HS students) when possible.

Here are the characteristics chosen for the District's SBB formula in 2018-19:

Student Need	Rationale
Base Weight	• Base Weight-- $3,400 for all K12 General Education Setting Students • SWD Increment-- $825 or 0.24 for all SWD self-contained students -- These students do not receive the full base weight because their instructional resources are locked. This means that schools will continue to receive Special Ed teachers/TAs from the Special Ed department, and these students only need an "incremental" amount to cover their share of the school's administrative, operational, and other schoolwide services.
Grade Weight: **K-5 with emphasis on K-2**	• Grade Level-- $1,020 or 0.3 for K-2, $680 or 0.2 for 3-5 • Based on the resources that have been unlocked to schools, ES need a slightly higher weight to cover their lower class size requirements. Additionally, many of the locked resources (i.e., athletics, CTE, security, custodial, etc.) are places where SS are likely to get a higher share than ES. • K-2 is weighted more because literacy is critical district focus area and highly predictive of future outcomes. • DATA USED: 1819 Projected enrollments by grade
***Incoming* Student Performance (High and Low)**	• *Incoming* student performance (high and low) – $340 or 0.1 • Student performance is one of the most important indicators of student need at a school. • Note that this will be calculated as incoming student performance (i.e., in MS/HS, we will look at the TNReady performance of its incoming 6th graders and 9th graders when they were 5th graders and 8th graders respectively, and use those %s to determine need) • DATA USED: ES/K-8 – Because incoming performance data is not available, • Low Performance: 1617 TNReady Below/Approaching Proficient % of 4th graders in 1718 enrollment year • High Performance: 1617 TNReady Advanced % of 4th graders in 1718 enrollment year MS/HS/6-12 • Low Performance: 1617 TNReady Below/Approaching Proficient % of Incoming 6th/9th graders in 1718 enrollment year

	• High Performance: 1617 TNReady Advanced % of Incoming 6th/9th graders in 1718 enrollment year
Mobility	• Mobility – $340 or 0.1 • Schools with highly mobile populations have greater levels of need. We will weight mobility instead of poverty because mobility is highly correlated to poverty but provides a more nuanced look at need. • DATA USED: Mobility rate (defined by # of students who transferred into the school after 20th day divided by # of students who ever attended the school, excluding students who attended for less than 1 week) calculated using year-end SY16-17 data.

Enrollment Projections and Fall Adjustments

Since school-by-school enrollment cannot be measured until the beginning of the school year but budget planning must begin the previous winter, we rely on *projected* enrollment figures to apply the aforementioned student weights and generate school budgets. The District puts a high premium on accurate projection numbers in order to give schools accurate preliminary budgets and enable targeted planning. But since it is nearly impossible to project school enrollments perfectly many months in advance, the District has also developed a policy for adjusting school budgets in a similar manner to how adjustments currently occur in the fall.

Baseline Services and Baseline Supplement

Pursuant to the resource flexibility guidelines listed in this document, empowered schools have significant flexibility over what resources they choose to purchase. Outside of the guidelines outlined in the resource flexibility section, the District will not instruct empowered schools what to buy. Nonetheless, the District is committed to ensuring that, *should they choose*, schools have enough money to purchase a standard set of resources that has traditionally been present in most SCS schools. We refer to that standard set of resources as "baseline services." It is the minimum set of services that the SBB allocation will provide for all schools, regardless of their size and student characteristics. If a school's initial SBB allocation (i.e. student enrollment multiplied by student weights) is not sufficient to pay for these services, the District will add money to the school's allocation, bringing it up to the baseline. The Finance Department will hold a reserve from the SBB Pool sufficient to cover this "baseline supplement." Very small schools are those most likely to fall short of being able to afford "baseline services" on their own, so the resources listed below should be considered appropriate in the context of a small school (<300 students). Resources that schools are not responsible for paying for are not included in "baseline services;" see resource flexibility section for more detail on which resources schools are responsible to pay for.

Position / Service	Grades K-8	Grades 9-12	Source
General Education Teachers	K-3rd: 20:1 4th-6th: 25:1 7th-8th: 30:1	30:1	TN Class Size Requirement
Physical Ed. Teachers	K-4th: 350:1 5th-6th: 265:1 7th-8th: N/A	N/A	TN Basic Education Program (BEP) funding formula
Art & Music Teachers	K-6th: 525:1 7th-8th: N/A	N/A	TN BEP
Assistant Principals	1 FTE: 550 to 1099 1.5 FTE: 1100 to 1319 2 FTE: 1320+	1 FTE: 1 to 649 2 FTE: 650 to 1249 3 FTE: 1250 to 1499 4 FTE: 1500 to 1749 5 FTE: 1750+	K-8th: BEP + SCS Hybrid* 9th-12th: SCS Staffing Formula**
Librarians	0.5 FTE: 1 to 264 1 FTE: 265+	0.5 FTE: 1 to 299 1 FTE: 300 to 999 2 FTE: 1000 to 2249 3 FTE: 2250 to 3000	TN BEP
Clerical Assistants	0.5 FTE: 1 to 224 1 FTE: 225 to 374 + 1 FTE: for every add'l 375 students		TN BEP
Financial Secretaries	1 per school		District Requirement
Substitute Teachers	$45.78 pp		FY19 Short-term sub budget pp
Instructional Supplies	$200 per teacher		District Requirement

SCS Staffing Supplement

To ease the transition to Student-Based Budgeting, in the first year of implementation (SY18-19), SCS will ensure that all schools will receive the amount of funds equivalent to what they would have received under SY17-18 Staffing Ratios. If a school's initial SBB allocation AND baseline supplement is not sufficient to pay for these services, the District will add additional money to the school's allocation, bringing it up to the amount required to repurchase SCS SY17-18 saffing allocations associated with the SBB Pool. The finance department will hold a reserve from the SBB Pool sufficient to cover this "SCS Staffing Supplement." Again, outside of the guidelines outlined in the resource flexibility section, the District will not instruct empowered schools on what to buy.

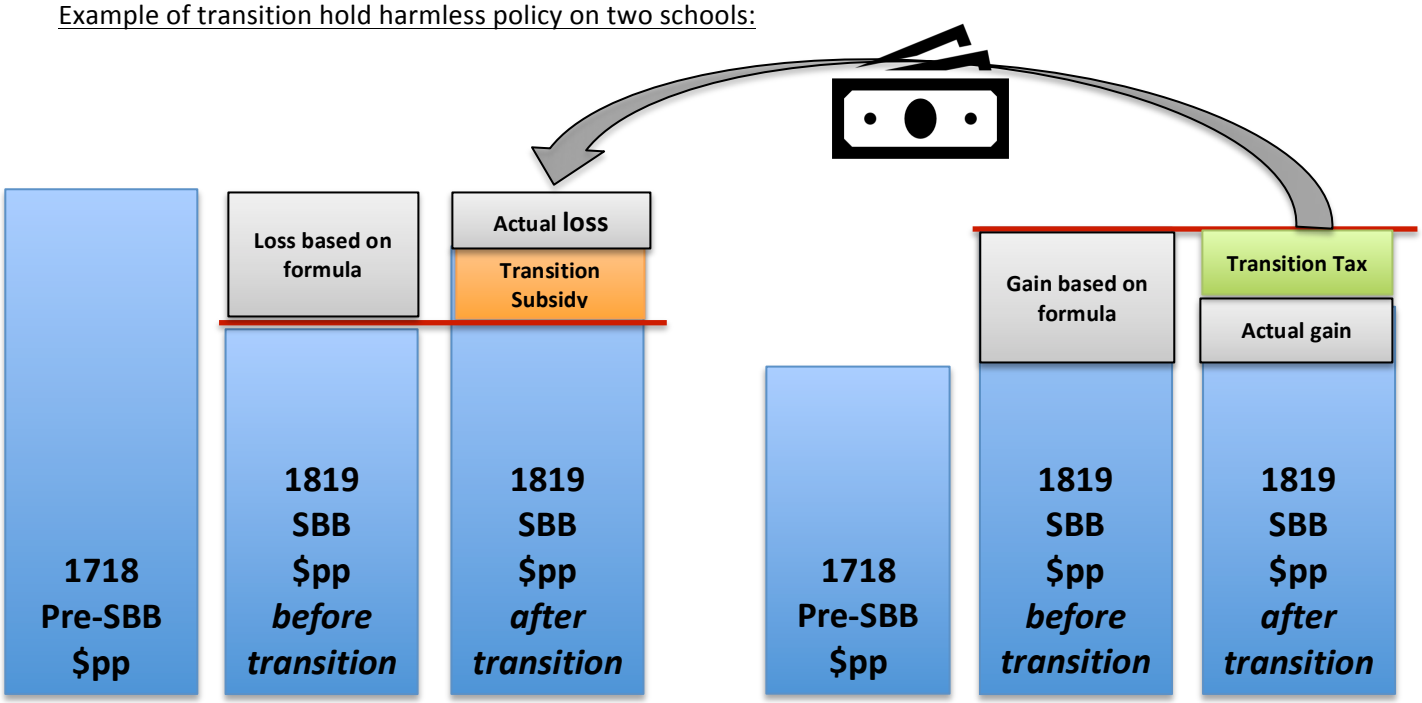
Transition Hold Harmless Policy

Student-Based Budgeting is a very different method of allocating resources than the staffing allocation-based method that SCS used in prior years. Prior to SBB, there was significant unplanned variation among different schools' per-pupil levels of funding. Small schools tended to receive more (per-pupil) than large schools; underutilized schools tended to receive more than those filled to capacity; and some schools simply received more because of years-old staffing decisions. Excluding temporary SIG grants, schools with higher student need did not necessarily receive more. Under SBB, a more equitable distribution of resources will see all schools funded at a more similar level to one another (on a per-pupil basis), with remaining differences directly tied to differences in student need.

This equitable distribution means, of course, that some schools will receive more than they did in prior years, while others will receive less. In the long term, the District is confident that this new method of apportioning resources will be effective and fair. In the short term, the District will take caution to ensure that schools don't experience swings in funding so dramatic as to disrupt the learning environments that teachers and staff build upon each year. To this end, the first few years of SCS's transition into SBB will include a **soft landing** policy by which no school can gain no more than 6.0% or lose more than 2.5% or the $ equivalent of 2 Teacher FTEs of its SY17-18 per-pupil funding level each year. **The transition policy will not apply indefinitely and the district will revisit this policy next year**.

For example, a school may receive a "transition subsidy" to ease the transition to SBB. Alternatively, a school may be charged a "transition tax" levied so that the District may temporarily subsidize schools losing funds under SBB.

Example of transition hold harmless policy on two schools:



School A was overfunded relative to its enrollment/student need profile, so it will lose money in shift to SBB.

In 1819, it will receive a "transition subsidy" to limit its loss at lesser of 2.5% or 2 Teacher FTEs.

School B was underfunded relative to its enrollment/student need profile, so it will gain money in shift to SBB.

In 1819, it will only experience a gain of 6.0% because it will need to pay a "transition tax" to allow the District to subsidize all the "transition awards" at losing schools.

Note: The transition hold harmless applies to losses due to the SBB formula ONLY and does not apply to loss in funds due to declining enrollment.

Q&A: Enrollment and Transition Policy under SBB

How does enrollment impact my budget?

SCS is anticipating declining enrollment next year. Because overall enrollment is declining, the District's overall funding is decreasing and as a result, schools with declining enrollment will see a decrease in their funding. **This has nothing to do with the transition to SBB.** Even if the District were not moving to SBB, schools with declining enrollment would also be seeing a decrease in their funding.

KEY TAKEAWAY: Schools with declining enrollment will see a decrease in their funding that has nothing to do with the transition to SBB. They are losing this money due to enrollment changes NOT due to SBB funding changes.

But what about the Transition Policy? Isn't there a loss limit or gain limit?

Yes, but SCS is only capping the losses and gains that come from the transition to SBB. SCS is not capping gains and losses due to changes in a school's enrollment. The -2.5%/+6.0% caps are calculated on a $pp basis and not on a total $ basis, to isolate the change due to transition to SBB.

SBB Transition Gain Cap	+6.0% on a $pp basis
SBB Transition Loss Cap	Lesser of -2.5% or 2 Teacher FTEs on a $pp basis

So, for example, in School A who is losing money under the new SBB formula:

Total Enrollment	500
1718 Unlocked Comparison $pp	$5,000pp
1819 SBB Allocations $pp	$4,500pp
If no loss limit existed, School A would experience a loss due to the transition to SBB of ….	-$500pp or -10% loss on $pp basis
But with the SCS transition policy, School A's loss is limited to 2.5% ….	School A will receive a "transition subsidy" of $187,500 to limits its losses to just -$125pp or -2.5% loss on $pp basis

In School B who is gaining money under the new SBB formula:

Total Enrollment	500
1718 Unlocked Comparison $pp	$5,000pp
1819 SBB Allocations $pp	$5,500pp
If no gain limit existed, School A would experience a gain due to the transition to SBB of ….	+$500pp or +10% gain on $pp basis

But with the SCS transition policy, School A's gain is capped at 7.0% …	School B will pay a "transition tax" of $150,000 to cap its gains at +$300pp or +6.0% gain on $pp basis.

There are two exceptions to the gain limit cap:

- Cohort schools are exempt. If they are slated to gain money in the transition to SBB, they will be exempt from the gain limit and be allowed to experience their full gain in Year 1.
- Six traditional schools are exempt in Year 1 because if the gain limit is imposed, they will be unable to meet the staffing formula requirements that is being applied to all traditional schools this year. This is a temporary exemption that will be revisited in Year 2.

Why am I paying a "transition tax" or receiving a "transition subsidy"?

The transition policy is another policy to ensure stability in the transition to SBB. Under the transition policy, schools will not gain or lose more than a certain % on a $pp basis in Y1. This is to ensure that no school will experience a dramatic swing in funding that would compromise its ability to support its students.

If you are receiving a transition subsidy, this means that your school is supposed to lose more under the SBB formula, but your loss is being capped at lesser of 2.5% or 2 FTE on a $pp basis. This subsidy is being paid by the transition tax on gaining schools.

If you are paying a transition tax, this means that your school is supposed to gain more under SBB but your gain is being capped at 6.0% on a $pp basis. Funds are being withheld from you to subsidize other schools to limit their losses.

How does this all come together?

There are a few potential scenarios that your school could fall into:

School A: Increasing enrollment + gaining under SBB

1. Change due to Enrollment	+5%	School A's enrollment is increasing and its funding is increasing under SBB because it has higher levels of student need relative to other schools in the District. This means School A will experience an increase in overall school funding.
2. Change due to SBB Transition	+5%	
= Total Change to Budget	**+10%**	

School B: Increasing enrollment + losing under SBB

1. Change due to Enrollment	+5%	School B's enrollment is increasing but its funding is decreasing under SBB because it has lower levels of
2. Change due to SBB Transition	-2.5%	

= Total Change to Budget	**+2.5%**	student need relative to other schools in the District. The overall school funding will depend on the relative size of the two factors. In School B, the impact of the change due to Enrollment is greater than the change due to SBB transition, so it will experience a net increase overall.

School C: decreasing enrollment + gaining under SBB

1. Change due to Enrollment	-10%	School C's enrollment is decreasing but its funding is increasing under SBB because it has higher levels of student need relative to other schools in the District. The overall school funding will depend on the relative size of the two factors. School C is losing significant enrollment, so although it does gain under SBB, it's not enough to offset the impact of the budget change due to enrollment.
2. Change due to SBB Transition	+5%	
= Total Change to Budget	**-4%**	

School D: decreasing enrollment + losing under SBB

1. Change due to Enrollment	-5%	School D's enrollment is decreasing and its funding is decreasing under SBB because it has lower levels of student need relative to other schools in the District. This means School D will experience a decrease in overall school funding.
2. Change due to SBB Transition	-2.5%	
= Total Change to Budget	**-7.5%**	

School E: no enrollment change + losing under SBB

1. Change due to Enrollment	0%	School E's enrollment is not changing and its funding is decreasing under SBB because it has lower levels of student need relative to other schools in the District. This means School E will experience a decrease in overall school funding that is entirely due to the SBB formula.
2. Change due to SBB Transition	-2.5%	
= Total Change to Budget	**-2.5%**	

Average Salary & Benefits – SBB Pool Only

Salaries and benefits are calculated based on a district-wide average by position type. Salaries and benefits are not adjusted based on the actual person occupying the position. Therefore, schools are not penalized for higher salaries and schools cannot recoup funds for employees

with a salary that's lower than the average salary. Similarly, schools will not recoup any portion of a position's benefits including employees not receiving benefits.

Position Title (SBB Pool Only)	***Avg. Compensation used for Budgeting***
Classroom Teacher (General Ed)	$71,634
Assistant Principal	$101,417
Librarian	$81,448
Educational Assistant (General Ed)	$27,717
Financial Secretary	$51,364
Clerical Assistant	$37,398
In-School Suspension Assistant/Study Hall Monitor	$29,918
Interventionist	$53,825

Note: The District will continue to budget Title I allocations with actual salaries and benefits.

Resource Flexibility for Empowered Schools

The following table describes the resources that are part of the SBB Pool in SY18-19. These categories are subject to change in SY19-20 and beyond.

Resource Category	Resource	In SBB Pool?	Flexible?
General Ed Instructional Staff	General Ed Teachers	Yes	Yes
	Music/Art/PE Teachers	Yes	Yes
	World Language & Strings Teachers	No	No
	Librarians	Yes	Yes
	Interventionists	Yes	Yes
	Educational Assistants (General Ed)	Yes	Yes
	In-School Suspension Asst/Study Hall Monitors	Yes	Yes
School Leader/Admin Staff & Supplies	Principals	No	No
	Assistant Principals	Yes	Yes
	Financial Secretaries	Yes	Yes
	Clerical Assistants	Yes	Yes
	Office Admin Supplies/Equipment	Yes	Yes
General Ed Instructional Materials & Supplies	Textbooks & Req'd Curricula	No	No
	Supporting materials & library books	Yes	Yes
Other	Short-term teacher	Yes	Yes

Compensation	substitutes		
	Long-term teacher substitutes	No	No
	Other staff substitutes	No	No
	Career Ladder & NBCT Stipends	No	No
	Non-Programmatic Stipends	**Yes**	**Yes**
Instructional Growth & Professional Development Staff & Supplies	PLC Coaches	No	No
	Curriculum Coaches	No	No
	PD Stipends & Travel	No	No
	Contracted PD	No	No
	ISPG Supplies & Materials	No	No
Pupil Services Staff & Supplies	Social Workers	No	No
	Guidance Counselors	No	No
	Nurses (Contracted & Non-Contracted)	No	No
	Pupil Services Supplies	No	No
Operational Staff & Supplies	Plant Managers	No	No
	Custodial Contract	No	No
	Mobile Security Officers	No	No
	Campus Monitors	No	No
	Utilities	No	No
	Operational Supplies & Equipment	No	No
Special Education	All Special Education Staff & Supplies	No	No
ELL	All ELL Staff & Supplies	No	No
Special Programs	iZone	No	No
	Optional	No	No
	Critical Focus	**$4M included in Pool** $2M excluded from Pool	**In Pool – Yes** Not in Pool - No
	Athletics	No	No
	Alternative	No	No
	Summer School	No	No
	Gifted	No	No
	ELOP	No	No
	ROTC	No	No
	CTE	No	No
	Pre K	No	No
Special Funds	Title I	No	**Yes**
	Title II	No	No
	Nutrition	No	No
	SIG Grants	No	**Yes**
	Other Special Funds	No	**Depends on terms of grant**

Academics Guidance

For Principals of All Schools

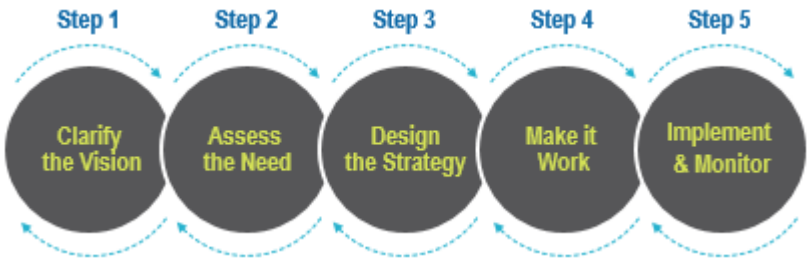
All schools, traditional, Early Adopter, and Strategic School Design Pilot schools are encouraged to apply a strategic lens to budgeting decisions.

Steps 1 and 2. This means first getting clear on your vision for instruction, social emotional supports, and student learning and then using data to know where your most urgent needs and opportunities are (for example, ELA and math in the entering/transition grades).

Step 3 is about deciding what strategies will be your priorities in 2018-19 (for example, shared-content team collaborative planning time) and simultaneously asserting what you will not be tackling as intensively.

Step 4 is where you are now: making resource choices that reflect your vision, needs, and strategy. Ideally, your vision, urgent needs, and strategies are evident in your schedule and staffing plan and will become official in your budget.

Step 5 starts this spring when you pull together your ILT, faculty, and other stakeholders and get going with implementation planning, preparing for a new school year in August!



To help guide your school design thinking, we encourage you to remember the four academic strategies below to enable **100% of schools to implement the curriculum with fidelity**. Schools should first be making resource decisions toward building an ILT whose members have proven expertise in the content area they support and ensuring that teachers have sufficient time for shared content and grade teams to learn and collaborate together.

1. **Formulate a strong ILT**
2. **Utilize the ILT to develop effective collaborative lesson plans**
3. **ILTs participate in the development of cycles of professional learning**
4. **Principals utilize instructional practice guides during informal observations to provide richer feedback and plan development for teachers**

For Principals of Traditional Schools

Traditional schools' budgeting process will look very similar to previous years. In advance of Budget Check-Out, you will receive an SBB allocation and staffing plan from the budget office for all unlocked positions. If you are interested in making cost neutral trades in positions (e.g. an extra teacher in lieu of a librarian) you may propose these changes during budget check-out for approval by the budget advisor and their ILD. If your school has additional funding in their SBB allocation above and beyond the staffing plan received from the budget office, then you may purchase additional unlocked resources to meet your school's strategic priorities.

For Principals of Early Adopter Schools

There were three strategic school design sessions in the fall for ILDs and Early Adopter principals, all focused on the below objectives:

- Securing expert support for cycles of professional learning and cycles of observation and coaching
- Ensuring sufficient time for collaborative planning in PLCs

Early Adopter schools have the same flexibilities offered to cohort schools. In keeping with the strategic focus of the District and expressed in the design sessions, Early Adopter schools are to use their flexibilities to improve expert support and to expand collaborative planning time to 90 minutes per grade or content area weekly.

ILDs are the primary coaches and strategic planning thought partners for Early Adopter principals.

Examples of resource choices

Expert support

- ✓ School purchases a literacy specialist position to coach teachers and facilitate ELA PLCs. (the ILT previously had an AP with science experience and a PLC coach with math experience; there were no other coaches*)
- ✓ School exchanges current assistant principal position for an instructional leadership position that is targeted to address ELA or math needs.
- ✓ School purchases an additional math teaching position to enable two lead teachers in math the release time to coach teachers, model lessons, and support PLC meeting planning and facilitation.

*Principals are strongly encouraged to move ILT members if their expertise is not a match for the content area for which they are responsible rather than layering on additional supports to compensate for assignment mis-matches. Your ILT will serve as a thought partner in these assignment decisions.

Collaborative planning time

- ✓ School purchases additional instructional aide positions to cover lunch so that recess time can be added adjacent to weekly collaborative planning time. Additionally, instructional aides can

be used to support other times of the day, provided that instructional time is preserved, to free teachers for planning.

- ✓ School purchases additional support position(s) to double supports one day per week for all or targeted grade or content areas so that teachers have a double planning block.
- ✓ School purchases time for substitutes to cover classes for two grades or content areas on Fridays every three weeks for 160 consecutive minutes. This time, which teams receive on a rotating basis, added to the ~45 mins/week of regular collaborative planning time equals an average of ~90 minutes/week for deep collaborative planning time.
- ✓ One of the PLC coaches, assistant principals, or other full-time, non-teaching positions is transformed to a half-time teaching position, thereby enabling changes to the schedule.

First, you, the principal, will demonstrate to your ILD that you both have aligned, qualified expert support for each of the priority content areas (ELA and math in elementary; ELA, math, science, and history/social studies in secondary) *and* 90 consecutive minutes of collaborative planning time weekly (or the monthly equivalent) for each of their grade/content teams expressed in the staffing list and the schedule. If you still have additional discretionary funds after that, you may use them to meet your school's urgent needs and strategic priorities.

Examples are: to purchase a research-based social emotional (SEL) curriculum and professional learning support for the faculty and students, to purchase an additional .5 or FTE social worker position to support high needs students, to purchase an additional .5 or FTE teaching position to provide ELA or math intervention support, or purchase stipends for additional days before the start of school for faculty to learn and collaborate on consistent practices for instruction and student culture.

Strategic School Design (SSD) Cohort or Pilot Schools

SSD Pilot schools share the flexibilities that Early Adopter Schools have and are making most of the same baseline changes in expert support and planning time. Because their principals and ILDs have participated in almost a year of SSD professional learning, they have full discretion to use their flexibilities according to the SSD plans they have developed with their school teams.

ERS coaches will continue to support principals and ILDs through the process.

Budget Check-Out (Traditional Schools)

Pre-Work

In advance of budget check-out, you will receive a workbook that contains:

1) Your school's **SBB allocation** and the enrollment used to calculate it. This will also provide preliminary information on Title I and locked resources.
2) Your school's **Staffing allocation** – in other words, how you will be spending your SBB funds. If you have additional funds above the staffing formula, you will be provided space to budget for additional positions in this workbook (Note: All changes are subject to approval during Budget Check-Out).

Your workbook will be sent with accompanying webinars that walk through each tab of the workbook.

Tip: The pages are formatted to print if you prefer to view a hard-copy version of the workbook.

During Budget Check-Out

What to Bring: You should arrive at Budget Check-Out with:

- Your workbook
- Performance evaluation data for your current staff members
- Proposed individuals that you will excess (only in the event that you must reduce staff)
- Proposed cost-neutral trades of positions, keeping in mind you still must abide by all state and district class size mandates, etc.
- Proposed additional staff members to purchase (only in the event that you have additional SBB dollars above your staffing allocation)

What will be discussed:

- Questions you have about your SBB allocation and how it was calculated
- Plan to excess staff (if applicable)
- Plan to make cost-neutral trades between positions
- Plan to purchase additional staff using additional SBB dollars (if applicable)

Follow-Up

Your HR business partner will schedule a follow up meeting with you to capture the following:

1. Ensure vacancies earmarked for external hire have been posted
2. Ensure vacancies earmarked for internal hire have been posted
3. Confirm names of anyone who is being excessed due to position elimination
4. Confirm names of recommended tenure dismissals. Provide supporting evidence documentation.

5. Confirm names of non-tenured non-renewal recommendations. Supporting evidence documentation is required.
6. Identify any teachers on waiver or permit who are at risk of not completing required praxis tests. If the teacher has demonstrated effort toward completion and is performing well in the classroom, he/she can be renewed for a second year.

When you get your workbook before Budget Check-Out, be sure to:

Step 1: Review the instructions page of your workbook and check that the school listed is your school. Use the navigation panel to click to the "1. Enrollment" page. Review your projected enrollment and student need data. No action needed on this page.

School Code	Location A
School Name	Example A

Navigation Panel: Click Here to return to "Instructions" | Click Here to go to "1. Enrollment" | Click Here to go to "2. Priorities" | Click Here to go to "3. SBB Allocations" | Click Here to go to "4. Budget »

Step 1. Review your school's projected enrollment

Directions: Step 1 is to review your school's projected enrollment for school year 2018-2019. This tab also shows you the student need enrollment counts used to calculate your school's SBB Allocation. This information is only for review; you do not need to edit anything on this page.

	Enrollment:	Explanation:
2018-19: Total Base-Weight Enrollment (K-12)	436	This includes all K12 General Education setting students (i.e., General Education students, Resource/Inclusion/Related Services SWD, and ELL students) who receive the SBB base weight. This does not include PreK students and Self-Contained SWD.
Total Base-Weight Enrollment	472	Your enrollment impacts your budget independent of the transition to SBB. For example, if a school's projected enrollment is lower, then their budget will decrease regardless of shift to SBB. These enrollment changes to your budget have nothing to do with the transition to SBB this year.
% Difference	-8%	
Total Base Weight Enrollment (K-12) by Grade	436	As stated above, this includes all K12 General Education setting students (i.e., General Education students, Resource/Inclusion/Related Services SWD, and ELL students) who receive the SBB base weight. This does not include PreK students and Self-Contained SWD. They do not receive the base weight because their resources are locked, i.e., schools will receive PreK and Self-Contained SWD teachers/resources outside of the SBB formula.
K	0	
1	0	
2	0	
3	0	
4	0	
5	0	
6	0	
7	0	
8	0	
9	102	
10	104	
11	119	
12	111	
		Please see the SBB Handbook for more detailed explanation of LOCKED RESOURCES.
		The K12 General Education setting enrollment by grade will be used to calculate the SBB Grade Weights
Total Increment Enrollment	1	SWD Self-Contained students will receive a "partial increment" -- because although their instructional dollars are locked and will be allocated to schools in addition to your SBB allocation, this increment is intended to cover their share of the school's administrative and operational costs.
Students eligible for Mobility Weight	53	Mobility (calculated off of SY1617) is defined as the # of students who transferred into school after Fall Staffing Adjustment Day, divided by total # of students who ever attended the school and excluding students who were at the school for < one week. The % is applied to your Total GenED Enrollment to calculate your SBB Mobility
% Mobility	12.1%	
Students eligible for Low Incoming Proficiency Weight	416	Incoming proficiency looks at the proficiency your incoming 4th, 6th, or 9th grade students. For a High School, we look at the prior year 8th grade test scores of your current 9th graders. For an Elementary School, because incoming proficiency is not available for Kindergarteners, we use the proficiency %s of your 3rd graders as a proxy. * Low proficiency is defined as scoring a 1 or 2 on the TNReady. * High proficiency is defined as scoring a 4 on the TNReady. * An average is taken between the high proficiency % of Math and ELA. * The proficiency % is applied to your Total GenED Enrollment to calculate your SBB Incoming Proficiency Allocations.
% Low Incoming Proficiency	95.4%	
Students eligible for High Incoming Proficiency Weight	0	
% High Incoming Proficiency	0.0%	

Step 2: Before diving into your budget, use the space provided on tab "2. Priorities" to answer questions regarding your 2018-2019 strategy.

School Code	Location B
School Name	School Name B

Navigation Panel: Click Here to return to "Instructions" | Click Here to go to "1. Enrollment" | Click Here to go to "2. Priorities" | Click Here to go to "3. SBB Allocations" | Click Here to go to "4. Staffing Allocations"

Step 2. Determine your school's strategic priorities for next year

Directions: Step 2 is to take a moment to reflect on your priorities, because how you choose to spend your resources should be informed by your school's strategic plan. This tab gives you space to identify your most urgent student needs , the strategies to address those needs, and the implications that this all has for your budget.
Reminder: Please only write and edit in yellow boxes.

2	<< Student Urgent Need #2 >>	<<Strategies to address urgent student needs>>	<<Implications for Budget-Staffing Plan?>>	<<Expected Student Outcomes and Achievement>> ***Key Questions:*** *How do you expect student outcomes and achievement to change as a result of this strategy? How will you measure the success of this strategy?*
3	<< Student Urgent Need #3 >>	<<Strategies to address urgent student needs>>	<<Implications for Budget-Staffing Plan?>>	<<Expected Student Outcomes and Achievement>> ***Key Questions:*** *How do you expect student outcomes and achievement to change as a result of this strategy? How will you measure the success of this strategy?*

Step 3: Review your SBB allocations on "3. SBB Allocations" page. If you have questions about how your allocation was calculated, revisit the SBB Formulas and Policies sections of this handbook.

School Code School Name	Location A Example A	Navigation Panel	Click Here to return to "Instructions"	Click Here to go to "1. Enrollment"	Click Here to go to "2. Priorities"	Click Here to go to "3. SBB Allocations"	Click Here to go to "4. Budget - Staffing Plan"

Step 3. Review your funding allocations for next year

Directions: Step 3 is to review your SBB allocations. This tab shows how your school's SBB allocation was calculated. You will also be able to see your school's Title I projections and some Locked Allocations. This information is only for review; you do not need to edit anything on this page.

Please review the SBB Handbook for more information about the SBB weights and how they were developed.

Total SBB Allocation				**$1,629,718**
1 SBB Allocations	Dollars allocated to your school through the SBB formula and baseline policy			$1,690,893
2 SBB Transition Supplements	Dollars either **given** or **withheld** as part of a district-wide strategy to maintain stability during the transition to SBB			-$61,175
How has my funding changed under SBB?	Your **"1718 Comparison"** includes last year's dollars that are now part of your SBB Allocation (these are "unlocked" dollars) This comparison does not include "locked dollars"	Last Year (1718) ...	$1,652,723	
		This year (1819) ...	$1,629,718	
		Total Difference	-$23,005	
	But remember! Changes to your projected enrollment impact your budget BEFORE SBB even applies			
	Estimated change to your budget due to ENROLLMENT CHANGES	Change from Enrollmer	-$126,055	
	Estimated change to your budget due to SBB TRANSITION	Change from SBB	$103,050	
Other Resources Outside of SBB				
3 Title I Estimate	Dollars allocated by Title I department (has specific usage guidelines). This is currently a projection and is subject to change.			$261,800
4 Locked Resources	**Part A.) Locked Allocations on School Budgets:** Dollars and staff allocated to your school that have remained locked ("locked" = not part of SBB). This means you do not need to budget for them with your SBB dollars.			$294,848
	Part B.) Locked Allocations from Central Office Departments: Dollars and staff allocated to your school by central office departments (e.g. ESL Positions, SWD Positions, PreK Positions). Allocations will continue to be given by corresponding departments and will not appear here.			Not shown in this workbook.

The information that follows on this page shows additional detail and explanation of your allocation. Please refer to the "3. SBB Allocations" webinar for a detailed explanation of this page.

Step 4: Review your staffing allocations on "3. Staffing Allocations" page.

School Code	Location B	Navigation Panel	Click Here to return to "Instructions"	Click Here to go to "1. Enrollment"	Click Here to go to "2. Priorities"	Click Here to go to "3. SBB Allocations"	Click Here to go to "4. Staffing Allocations"
School Name	School Name B						

Step 4. Review your staffing allocations for next year and plan exceptions & trade-offs

Directions: The final step is to review your staffing allocations. This tab outlines your school's staffing allocation based on SCS's staffing formula and any approved trades and exceptions. First, review your school's staffing allocations for next year. Next, review the dollars you have leftover from your SBB allocation. If you have additional $s, you can budget for additional positions or make cost neutral trades using the **YELLOW BOXES. Reminder that all changes are subject to approval at Budget Check-Out.**

SBB Allocations	Total Dollars allocated to your school via SBB formula	$	2,831,637
Staffing Allocations	SBB dollars earmarked to pay for Staffing Allocations -- see positions below.	$	2,713,405
Remaining SBB Allocation	This is how much money you have left over to budget for add'l positions and resources.	$	118,233

		FTEs	$s
1 General Ed Teachers		29.00	$ 2,077,221
Formula	Teachers allocated to your school via SCS staffing formula	25	$1,790,708
ROTC/CTE Adjustment	Teachers held back from the formula due to ROTC/CTE teacher allocations	0	$0
Small School Supplement	Additional teachers to staff small middle and high schools.	3	$214,885
Exceptions & Tradeoffs	Exceptions due to strategic budget checkout cost neutral trades or other approved exceptions.	1	$71,628
2 Assistant Principals		1.00	$ 101,417
Formula	Assistant Principals allocated to your school via SCS staffing formula.	1	$101,417
Exceptions	Exceptions due to strategic budget checkout cost neutral trades or other approved exceptions.	0	$0
3 Financial Secretaries		1.00	$ 51,290
Formula	Financial Secretaries allocated to your school via SCS staffing formula.	1	$51,290
Exceptions	Exceptions due to strategic budget checkout cost neutral trades or other approved exceptions.	0	$0
4 Clerical Assistants		3.00	$ 112,177
Formula	Clerical Assistants allocated to your school via SCS staffing formula.	3	$112,177

Step 5: If you have fewer staff projected for 1819 than are currently in your building, use evaluation data to determine who in your building will be excessed. **You must arrive at budget check-out with this information in hand.**

Step 6: If you have SBB dollars remaining in your allocation after budgeting for all required staff on the staffing allocations tab, determine what additional positions you would like to purchase. You may use the drop-down lists on the "Staffing Allocations" tab to make adjustments, however **your workbook is draft only** and NOT the official copy. **All changes are subject to approval at Budget Check-Out** where you will complete the final version.

Budget Check-Out (Cohort/Early Adopter Schools)

Pre-Work

In advance of budget check-out, you will receive a workbook that contains:

1) Your school's **SBB allocation** and the enrollment used to calculate it. This will also provide preliminary information on Title I and locked resources.
2) Space **to draft your 2018-19 budget** – in other words, how you will be spending your unlocked funds.
3) Space to thin about you will **strategically use resources** in order to address your students' most urgent needs.

Your workbook will be sent with accompanying webinars that walk through each tab of the workbook.
Tip: The pages are formatted to print if you prefer to view a hard-copy version of the workbook.

During Budget Check-Out

What to Bring: You should arrive at Budget Check-Out with:

- Your completed workbook (reminder that all changes are subject to approval at Budget Check-Out)
- Performance evaluation data for your current staff members

What will be discussed:

- Questions you have about your SBB allocation and how it was calculated
- Your proposed budget-staffing plan

Follow-Up

Your HR business partner will schedule a follow-up meeting with you to capture the following:

7. Ensure vacancies earmarked for external hire have been posted
8. Ensure vacancies earmarked for internal hire have been posted
9. Confirm names of anyone who is being excessed due to position elimination
10. Confirm names of recommended tenure dismissals. Provide supporting evidence documentation.
11. Confirm names of non-tenured non-renewal recommendations. Supporting evidence documentation is required.
12. Identify any teachers on waiver or permit who are at risk of not completing required praxis tests. If the teacher has demonstrated effort toward completion and is performing well in the classroom, he/she can be renewed for a second year.

When you get your workbook before Budget Check-Out, be sure to:

Step 1: Review the Instructions page of your workbook and check that the school listed is your school. Use the navigation panel to click to the "1. Enrollment" page. Review your projected enrollment and student need data. No action needed on this page.

School Code	Location A	**Navigation Panel**	Click Here to return to "Instructions"	Click Here to go to "1. Enrollment"	Click Here to go to "2. Priorities"	Click Here to go to "3. SBB Allocations"	Click Here to go to "4. Budget -
School Name	Example A						

Step 1. Review your school's projected enrollment

Directions: Step 1 is to review your school's projected enrollment for school year 2018-2019. This tab also shows you the student need enrollment counts used to calculate your school's SBB Allocation. This information is only for review; you do not need to edit anything on this page.

	Enrollment:	**Explanation:**
2018-19: Total Base-Weight Enrollment (K-12)	**436**	This includes all K12 General Education setting students (i.e., General Education students, Resource/Inclusion/Related Services SWD, and ELL students) who receive the SBB base weight. This does not include PreK students and Self-Contained SWD.
Total Base-Weight Enrollment	472	Your enrollment impacts your budget independent of the transition to SBB. For example, if a school's projected enrollment is lower, then their budget will decrease regardless of shift to SBB. These enrollment changes to your budget have nothing to do with the transition to SBB this year.
% Difference	-8%	
Total Base Weight Enrollment (K-12) by Grade	**436**	As stated above, this includes all K12 General Education setting students (i.e., General Education students, Resource/Inclusion/Related Services SWD, and ELL students) who receive the SBB base weight. This does not include PreK students and Self-Contained SWD. They do not receive the base weight because their resources are locked, i.e., schools will receive PreK and Self-Contained SWD teachers/resources outside of the SBB formula.
K	0	
1	0	
2	0	
3	0	
4	0	
5	0	
6	0	
7	0	
8	0	
9	102	
10	104	
11	119	
12	111	The K12 General Education setting enrollment by grade will be used to calculate the SBB Grade Weights
Total Increment Enrollment	**1**	SWD Self-Contained students will receive a "partial increment" -- because although their instructional dollars are locked and will be allocated to schools in addition to your SBB allocation, this increment is intended to cover their share of the school's administrative and operational costs.
Students eligible for Mobility Weight	**53**	Mobility (calculated off of SY1617) is defined as the # of students who transferred into school after Fall Staffing Adjustment Day, divided by total # of students who ever attended the school and excluding students who were at the school for < one week. The % is applied to your Total GenED Enrollment to calculate your SBB Mobility
% Mobility	12.1%	
Students eligible for Low Incoming Proficiency Weight	**416**	Incoming proficiency looks at the proficiency your incoming 4th, 6th, or 9th grade students. For a High School, we look at the prior year 8th grade test scores of your current 9th graders. For an Elementary School, because incoming proficiency is not available for Kindergarteners, we use the proficiency %s of your 3rd graders as a proxy. * Low proficiency is defined as scoring a 1 or 2 on the TNReady. * High proficiency is defined as scoring a 4 on the TNReady. * An average is taken between the high proficiency % of Math and ELA. * The proficiency % is applied to your Total GenED Enrollment to calculate your SBB Incoming Proficiency Allocations.
% Low Incoming Proficiency	95.4%	
Students eligible for High Incoming Proficiency Weight	**0**	
% High Incoming Proficiency	0.0%	

Step 2: Before diving into your budget, use the space provided on tab "2. Priorities" to answer questions regarding your 2018-2019 school design plan.

School Code	Location A
School Name	Example A

Navigation Panel: Click Here to return to "Instructions" | Click Here to go to "1. Enrollment" | Click Here to go to "2. Priorities" | Click Here to go to "3. SBB Allocations" | Click Here to go to "4. Budget - Staffing

Step 2. Determine your school's strategic priorities for next year

Directions: Step 2 is to take a moment to reflect on your priorities, because how you choose to spend your resources should be informed by your school's strategic plan. This tab gives you space to identify your most urgent student needs , the strategies to address those needs, and the implications that this all has for your budget.

Reminder: Please only write and edit in yellow boxes.

A. Identify your school's urgent student needs, the strategies to address those needs, and budget/staffing implications

	Early Adopter Guidelines	Strategies to Address Guideline	Budget / Staffing Implications	Expected Student Outcomes and Achievement
1	<< Guideline #1 >> ***Building a Strong ILT***	<<Strategies to address urgent student needs>> ***Key Question:*** *What strategies and changes will you implement next year to address this guideline?*	<<Implications for Budget-Staffing Plan?>> ***Key Questions:*** *What are the resource implications for these strategies? Do you need to hire additional people? Do you need to invest in a certain curricula? How much will this all cost you?*	<<Expected Student Outcomes and Achievement>> ***Key Questions:*** *How do you expect student outcomes and achievement to change as a result of this strategy? How will you measure the success of this strategy?*
2	<< Guideline #2 >> ***Providing a Structure to Review Student Work to Support the Lesson Planning Process*** ***This must include 90 consecutive minutes of weekly shared content teams (through the use of scheduling and strategic staffing)***	<<Strategies to address urgent student needs>> ***Key Question:*** *What strategies and changes will you implement next year to address this guideline?*	<<Implications for Budget-Staffing Plan?>> ***Key Questions:*** *What are the resource implications for these strategies? Do you need to hire additional people? Do you need to invest in a certain curricula? How much will this all cost you?*	<<Expected Student Outcomes and Achievement>> ***Key Questions:*** *How do you expect student outcomes and achievement to change as a result of this strategy? How will you measure the success of this strategy?*

Step 3: Review your SBB allocations on "3. Allocations" page. If you have questions about how your allocation was calculated, revisit the SBB Formulas and Policies sections of this handbook.

School Code School Name	Location A Example A	Navigation Panel	Click Here to return to "Instructions"	Click Here to go to "1. Enrollment"	Click Here to go to "2. Priorities"	Click Here to go to "3. SBB Allocations"	Click Here to go to "4. Budget - Staffing Plan"

Step 3. Review your funding allocations for next year

Directions: Step 3 is to review your SBB allocations. This tab shows how your school's SBB allocation was calculated. You will also be able to see your school's Title I projections and some Locked Allocations. This information is only for review; you do not need to edit anything on this page.

Please review the SBB Handbook for more information about the SBB weights and how they were developed.

Total SBB Allocation				**$1,629,718**
1 SBB Allocations	Dollars allocated to your school through the SBB formula and baseline policy			$1,690,893
2 SBB Transition Supplements	Dollars either **given** or **withheld** as part of a district-wide strategy to maintain stability during the transition to SBB			-$61,175
How has my funding changed under SBB?	Your **"1718 Comparison"** includes last year's dollars that are now part of your SBB Allocation (these are "unlocked" dollars)	Last Year (1718) ...	$1,652,723	
		This year (1819) ...	$1,629,718	
	This comparison does not include "locked dollars"	Total Difference	-$23,005	
	But remember! Changes to your projected enrollment impact your budget BEFORE SBB even applies			
	Estimated change to your budget due to ENROLLMENT CHANGES	Change from Enrollmer	-$126,055	
	Estimated change to your budget due to SBB TRANSITION	Change from SBB	$103,050	
Other Resources Outside of SBB				
3 Title I Estimate	Dollars allocated by Title I department (has specific usage guidelines). This is currently a projection and is subject to change.			$261,800
4 Locked Resources	**Part A.) Locked Allocations on School Budgets:** Dollars and staff allocated to your school that have remained locked ("locked" = not part of SBB). This means you do not need to budget for them with your SBB dollars.			$294,848
	Part B.) Locked Allocations from Central Office Departments: Dollars and staff allocated to your school by central office departments (e.g. ESL Positions, SWD Positions, PreK Positions). Allocations will continue to be given by corresponding departments and will not appear here.			Not shown in this workbook.

The information that follows on this page shows additional detail and explanation of your allocation. Please refer to the "3. SBB Allocations" webinar for a detailed explanation of this page.

Step 4: Navigate to the "4. Budget-Staffing" tab. Here is where you will create your budget and staffing plan for the school year 2018-19. As a starting point, you will be shown your current staffing (2017-2018). You will then decide which positions to keep and which positions to add in order to create your budget plan. Follow this checklist to complete this page.

☐	**TABLE 1: UNLOCKED TEACHERS** Update POSITION STATUS (if necessary) Update EMPLOYEE STATUS (if necessary) Update FUND (if necessary) Update FTE (if necessary)
☐	**TABLE 2: UNLOCKED OTHER POSITIONS** Update POSITION STATUS (if necessary) Update EMPLOYEE STATUS (if necessary) Update FUND (if necessary) Update FTE (if necessary)
☐	**TABLE 3: TITLE I POSITIONS** ***Note:*** This table can only be updated by central office support (HR, Finance, etc…) ***Task:*** Identify Title I changes that you would propose to central office
☐	**TABLE 4: ALL OTHER LOCKED POSITIONS** ***Note:*** This table can only be updated by central office support (HR, Finance, etc…) ***Task:*** Identify updates to locked employees would like to chare with central office

☐	**TABLE 5: ADDITIONAL POSITIONS** If adding additional positions: Update PCN (if available) Update JOB TITLE Update FUND Update FTE
☐	**TABLE 6: PROPOSE NEW POSITIONS** If proposing to create a new position: Update PCN (if available) Update NEW POSITION JOB TITLE Update JOB DESCRIPTION ACCEPT conditions (by checking the box)
☐	**TABLE 7: UNLOCKED NON-PERSONNEL BUDGETS** Update DOLLARS Update FUND

To navigate to each table, scroll down the "4. Budget-Staffing Plan" page. Only make edits in yellow cells and use the drop down menus to make your edits.

Step 5: Check that your plan adheres to the following guidelines that applies to your unlocked resources:

- Gen Ed Class Size Maximums: (K-3) 25 students per class, (4-6) 30 students per class, (7-12): 35 students per class.
- Financial Secretary: You must budget for at least 1 financial secretary.
- Instructional Supplies: You must budget for at least $200 per teacher.

Questions?

Below is a list of the team members who will be your partners to help you make appropriate budget decisions.

Budget	Role	E-mail Address	Telephone
Vincent Eason	Budget Manager	easonv@scsk12.org	901.416.5865
Taurus Currie	Budget Advisor	currietb@scsk12.org	901.416.5696
Aetna Smith	Sr. Budget Analyst	smitha16@scsk12.org	901.416.0214
Dorothea Payton	Sr. Budget Analyst	paytond1@scsk12.org	901-416.9973
Cassandra Stockard	Budget Analyst	stockardc@scsk12.org	901.416.5440

For additional help, information and feedback, please contact the Budget Team at scsbudget@scsk12.org.