



# Funding System Redesign in Rochester City School District:

Equitable Student Funding (ESF)  
RCSD Board Study Session 06 January 2011



# Today's Objectives

**Background, Strategic Alignment  
and Principal Engagement**

Equitable Student Funding Details –  
Budget and Autonomy

Equity Work

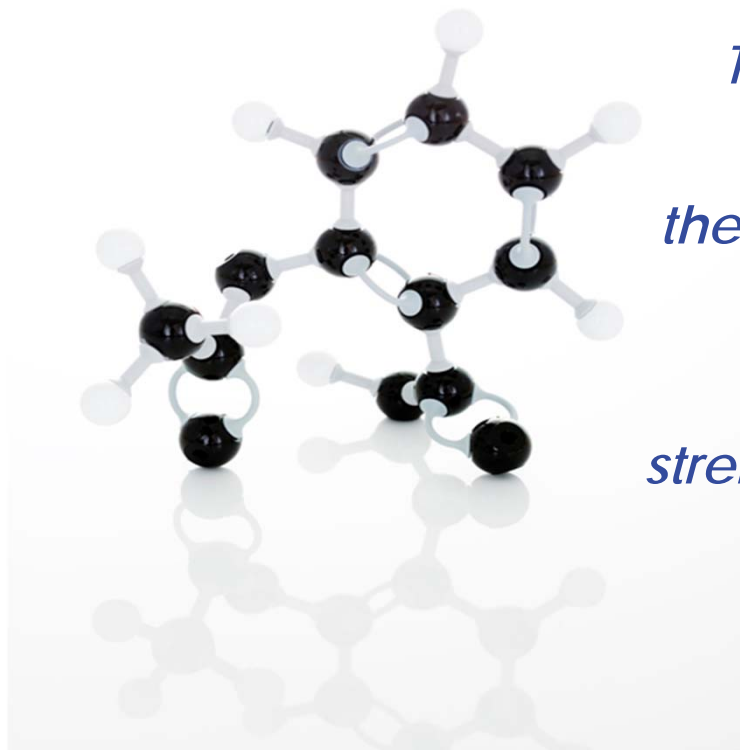
Weights “Aligning cost with  
Services

Strategic Support to Schools  
“Building Capacity and Success”

Enterprise Planning Module (EPM) And  
ESF Management Tools “How Will  
Schools Develop Their Budgets”



# RCSD Is Redesigning A Complex System Equitable Student Funding (ESF) Supports That Work



*The allocation and use of resources  
must support  
the districts strategic improvement plans  
and programs.*

*Funding decisions should  
strengthen and unify academic decisions  
at the district and school levels*



# What has this work looked like for RCSD?

2009-10

## Introduce School-Based Budgeting

- \* Devolve control of some resources and funding streams to schools
- \* Begin to improve horizontal equity, particularly around outlier schools

2010-11

## Move to full School-Based Budgeting

- \* Devolve control of more resources and funding streams to schools
- \* Dollarize school staffing resources

2011-12

## Move to Weighted Student Funding

- \* Give schools dollars based on student enrollment and a student weight/foundation formula
- Continue to devolve resources

### Over time, we will need to:

1. Build principal capacity for strategic resource use
2. Build infrastructure
3. Eliminate external constraints
4. Transition in equity changes (phased and aligned with academic work for special populations ELL, SPED)



# RCSD Strategy Map Drives Strategic Investments

**Every child is a work of art. Create a masterpiece.**

Student  
Achievement

Increase mastery of curriculum

Every student is post-secondary ready

Close achievement gap

Stakeholders

**Rochester City School District...**

"Has prepared me for college and career"

Students

"Cares about my child's success and safety"

Parents

"Values and supports my contribution to student success"

Staff

"Is an asset to the community"

Community

Internal Processes

## Right School For Every Child

Build a learning environment that supports student success

Create an innovative portfolio of high-quality choices for families

Support the whole child through a systems approach to school culture and climate

## The Rochester Curriculum

Focus on college and career readiness

Ensure academic rigor for every student

Differentiate student support to meet the needs of every student

## Great Teachers and Leaders

Develop and support diverse and highly effective school leaders

Develop and support a diverse set of highly committed and effective teachers

Create a culture in which we hold ourselves accountable for student success

Recruit and retain talent

Operational  
Excellence

Ensure transparency and equity in resource distribution

Become a Strategy-Focused Organization

Best in class standards of efficiency and customer service

Use data to inform decisions and actions



# Five areas of practice that are catalysts for system transformation ...creation of equity and excellence

## Strategic School Design

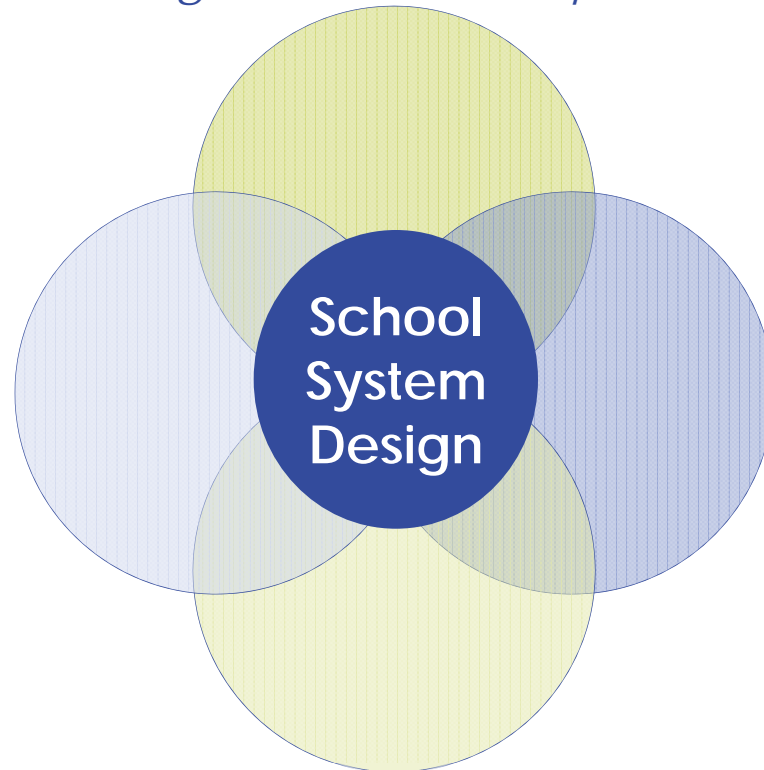
**Past RCSD Work:** *Case studies of high performing schools*

**Present RCSD Work:** *Portfolio development, New School Partnerships and design, Charter Compact*

## School Support, Planning and Supervision

**Past RCSD Work:**  
*Essential Standards*

**Present RCSD Work:** *Parent Engagement, Network Support and School Inquiry Teams*



## Human Capital

**Past RCSD Work:**  
*DICA ELA Audit*

**Present RCSD Work:**  
*Evaluations and Compensation Redesign*

## School Funding and Staffing Systems

**Past RCSD Work:** *Blue Ribbon Commission*  
**Present RCSD Work:** *Equitable Student Funding*



Funding  
Deep Dive  
Today



# RCSD has embarked on a multi-year project to redesign the school funding and budgeting process

The goals is to create a funding system that supports organizational focus and resource management within the framework of our Core Values:

## **Achievement:**

- Empower schools by providing them with more control over their resources as well as the capacity to use those resources in high performing ways
- Ensure that the budget and the budget process support the district's academic strategy
- Align other critical district processes, such as those associated with staffing and operations, to support the school planning and budgeting process

## **Equity:**

- Allocate school resources equitably across schools and ensure that students are funded based on need

## **Accountability:**

- Increase transparency of the budgeting process
- Ensure that budgeting allocations are predictable from year to year so that disruptions to the educational process are minimized



# School Funding (ESF) will help fix four main types of resource misalignments

## Resources tied up in the wrong things

e.g., Teacher compensation tied up in steps and lanes rather than increased pay for performance or additional responsibility

## Piecemeal investment in an integrated solution

e.g., Creating time for collaborative planning, but not investing in data and expert support so that teachers use it effectively

## Underinvestment in the right things

e.g., Not investing in aligned formative assessment or limited collaborative planning time for teachers

## Nonstrategic over-investment in “good things”

e.g., “Peanut butter” class size reductions or generic and untargeted system-wide PD for teachers



## IN THE BEGINNING

# Principals and Central Office Staff Were Surveyed To Create: A Vision for School Empowerment

**ERS surveyed all RCSD principals and selected RCSD central office staff about their vision for school empowerment**

- The survey included a list of 50 school resources and we asked respondents to tell us the type of control they thought principals should have over these resources in the future.

	# of Responses	Response Rate
Central Office Survey	15	60%
Principal Survey	32	55%

Principal Experience	
First year	9%
2-4 years	31%
5-9 years	44%
10-14 years	9%
15-19 years	3%
20+ years	3%

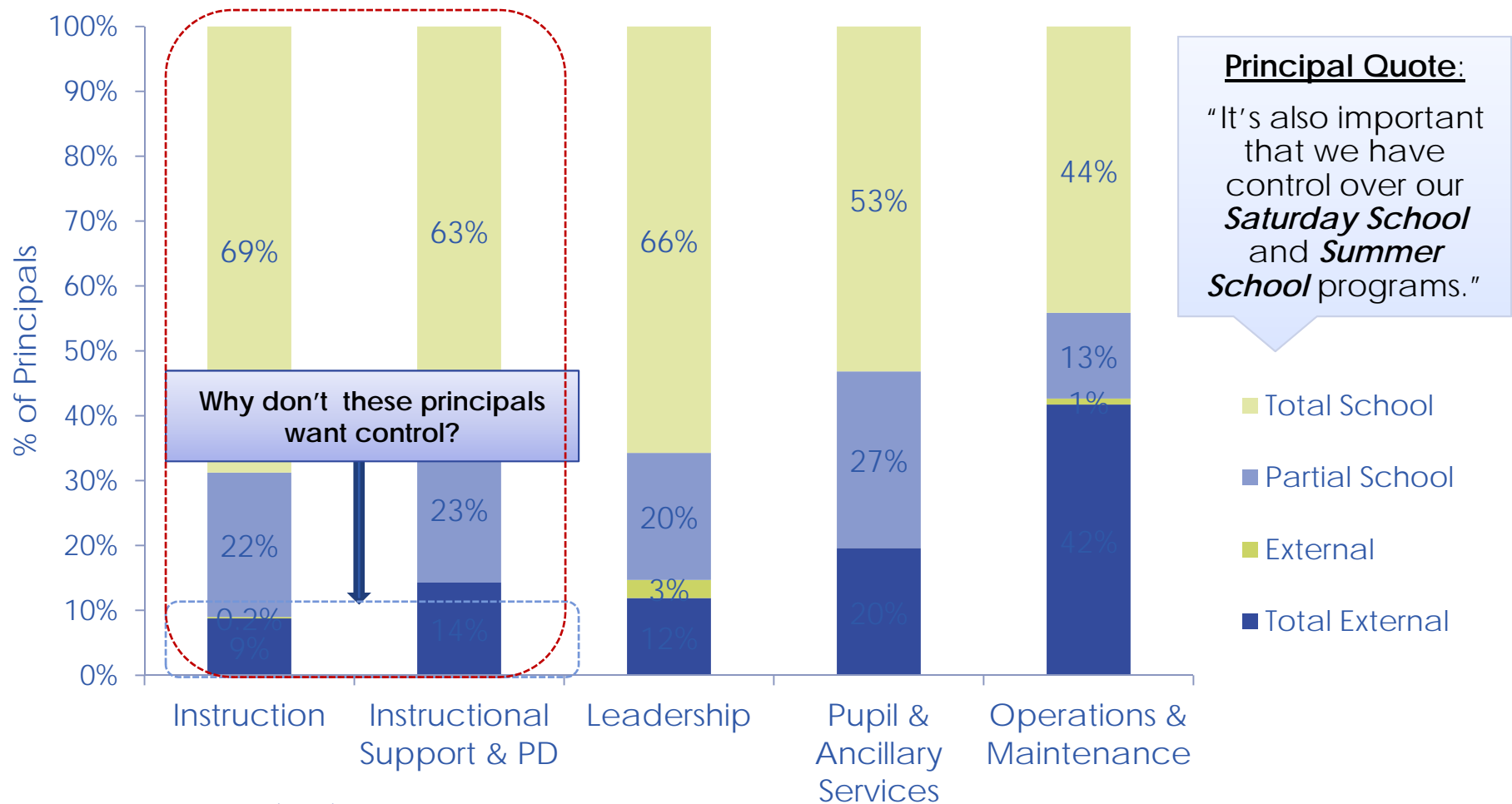
Principal School Type	
Elementary School	75%
Secondary School	19%
Alt. School	6%

Note: We received a total of 42 respondents for the principal survey but 10 respondents were removed from the survey analysis because they provided partial answers that could not be properly analyzed.



# Principals view themselves as Instructional Leaders

## % of Principals That Wanted Control Over Their School Resources



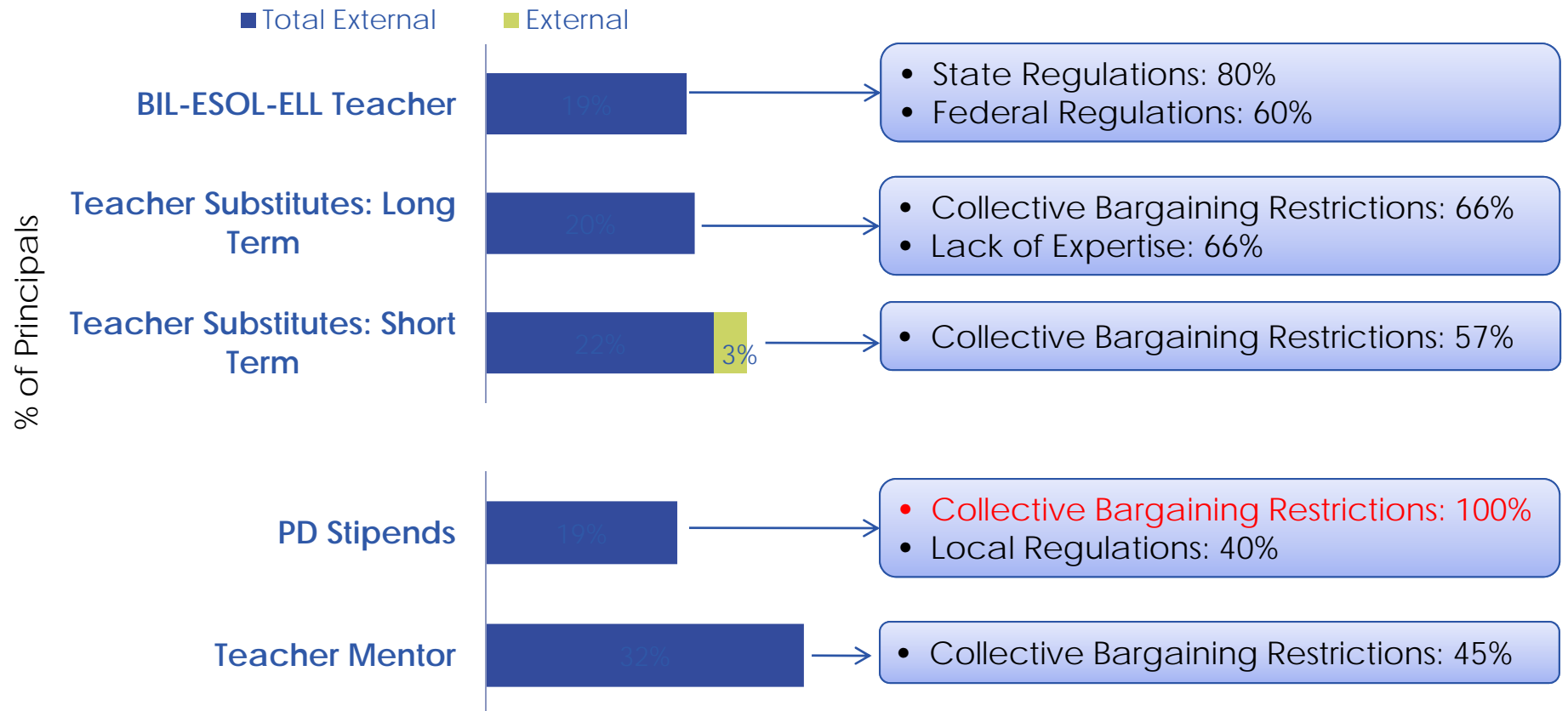
Source: ERS Principal Survey (n=32)



# A small group of principals did not want control over some of their instructional resources, citing concerns about collective bargaining restrictions, regulations, and lack of expertise

## % of Principals That Did Not Want Control Over These Instructional Resources

## Major Limitations Cited by the Principals that Didn't Want Control

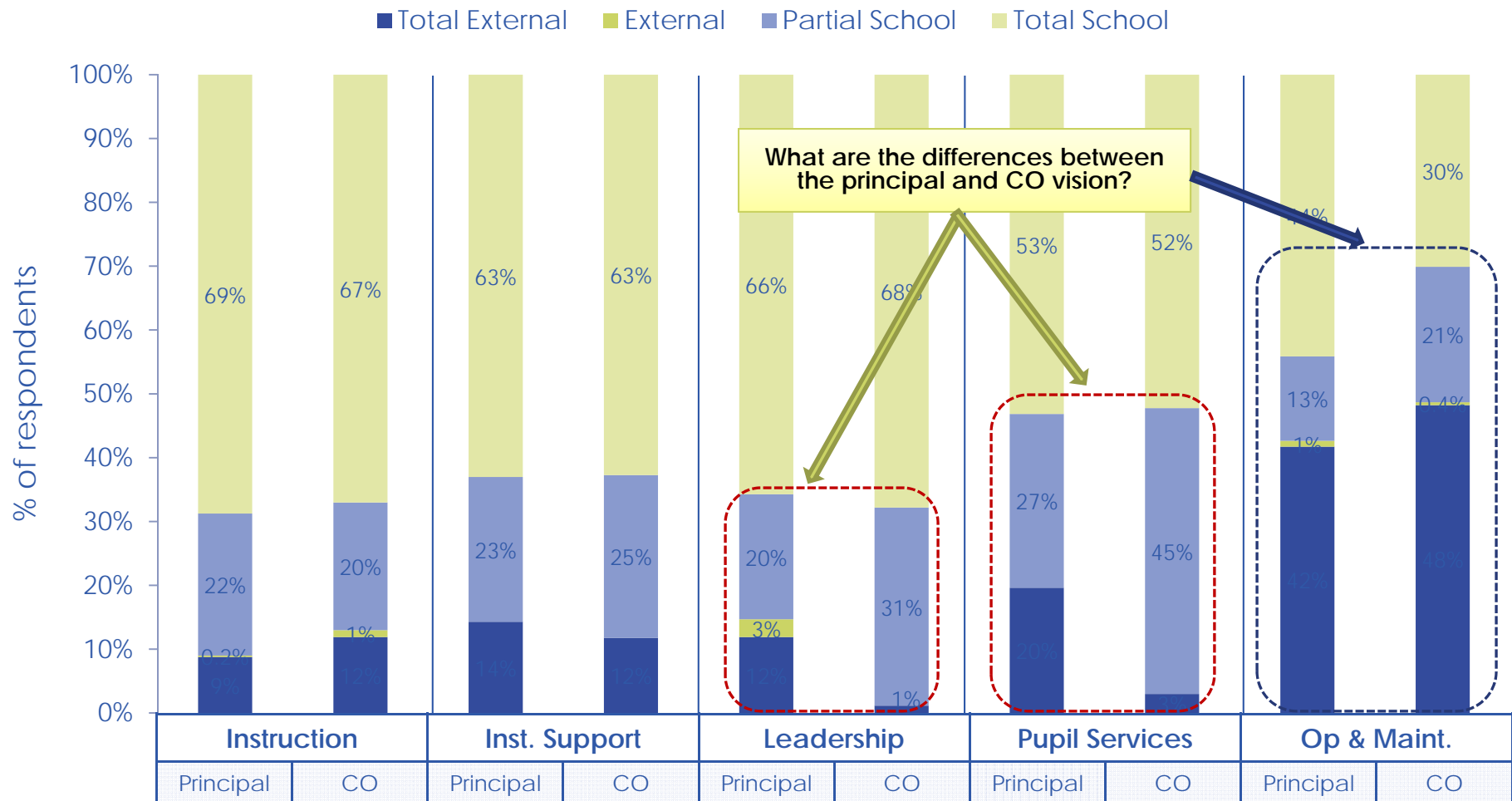


Source: ERS Principal Survey (n=32). Multiple responses allowed for "Major Limitations" question.



The Principal and CO vision is mostly aligned but the CO vision is more expansive for Leadership and Pupil Services resources, while principals want more control over O&M resources

## Vision of Control: Principals vs. Central Office

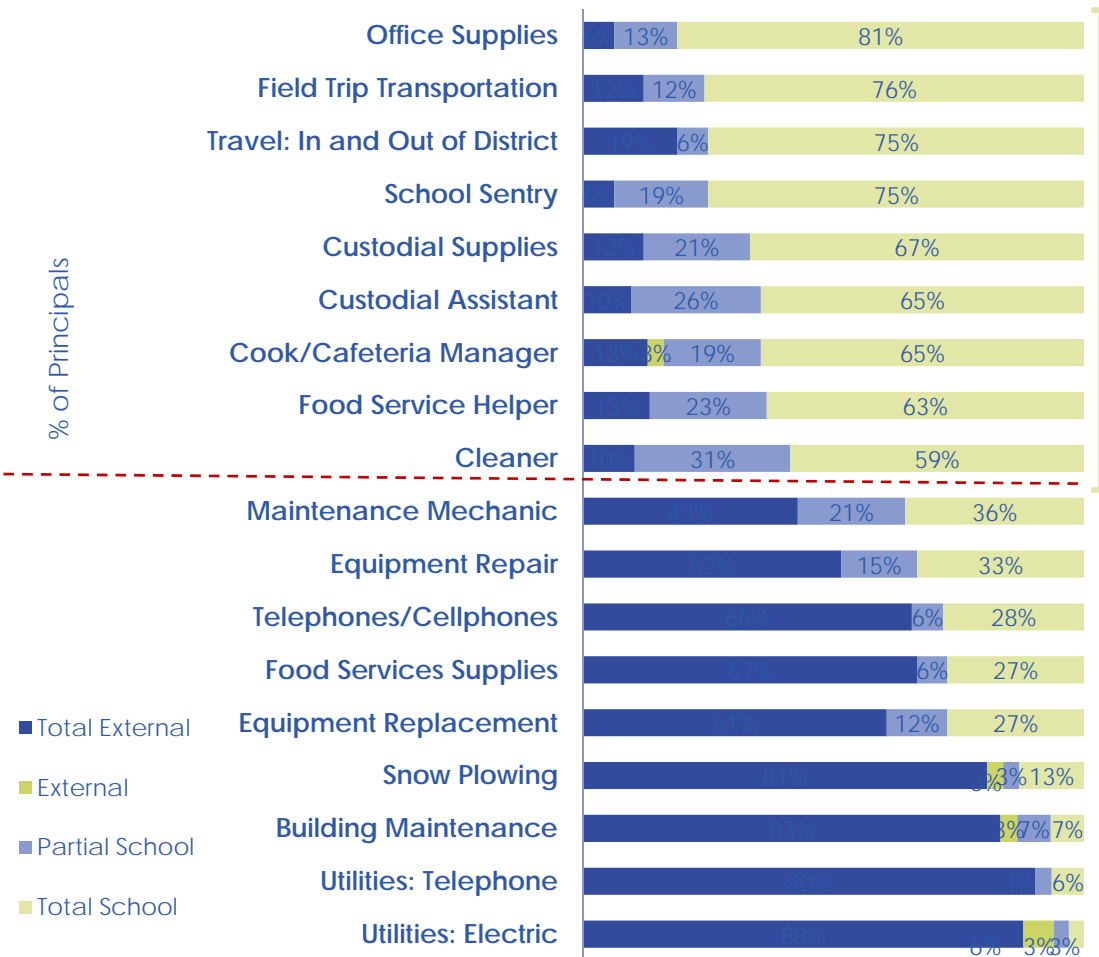


Source: ERS Principal Survey (n=32), Central Office Survey (n=15)



# Operations & Maintenance: Principals want more control over the resources that support their work as instructional leaders; they're less interested in resources that "keep the doors open"

## % of Principals That Wanted Control Over O&M Resources



## Any Compelling Reasons to Retain Control?

More than 50% of the Central Office respondents felt that there were no compelling reasons to retain control over all of these resources, except for:

	No Reason	Yes, there is a Compelling Reason
School Sentry	38%	Consistency: 46%
Custodial Supplies	31%	EconOfScale: 54%



## Summary: Principals and the CO respondents both view principals as instructional leaders, but they differ in how they define "instructional leader"

- Principals and the CO respondents all agreed that principals should have control over *Instruction* and *ISPD* resources
- But Central Office respondents had a more encompassing vision of "instructional leader" that included:
  - More principal control over *Leadership* and *Pupil Services* resources
  - Less principal control over *Operations & Maintenance*
- While the majority of principals were interested in having more control over most school resources, some principals cited concerns over:
  - The impact of collective bargaining and federal/state restrictions on controlling *Instruction*, *ISPD*, and *Leadership* resources
  - Their lack of expertise over certain student- and subject-specific *Pupil Services* resources
  - Their need to have control over the *Operations & Maintenance* resources that support their work as instructional leaders, while not necessarily being burdened with the O&M resources that help "keep the doors open"



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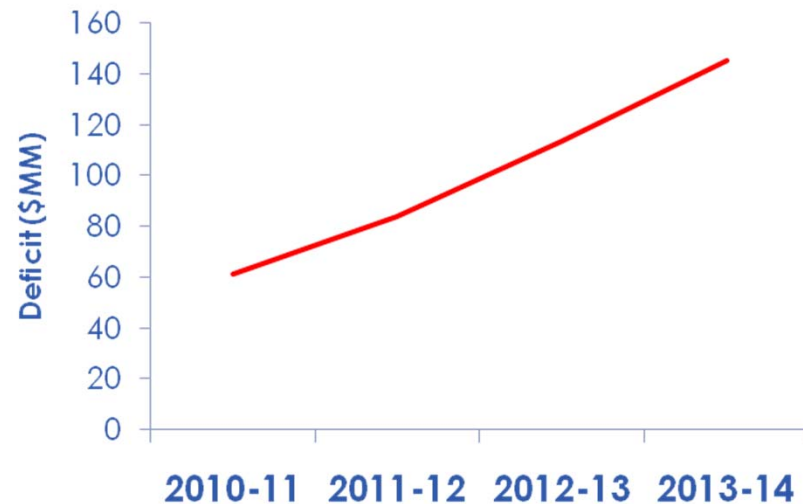
# It is important to understand current school-level resource use right now because ...

RCSD is projecting a 2011-12 Budget Deficit of **\$100 million\*** and there will be continued financial pressure as we go forward

So all schools will need to learn how to do more with less



Projected Budget Deficit





# Under ESF, school level resource use will be impacted in important ways

It will create greater equity across students and schools:

*So some schools will experience additional “equity” cuts in their budget and some schools will experience “equity” increases*



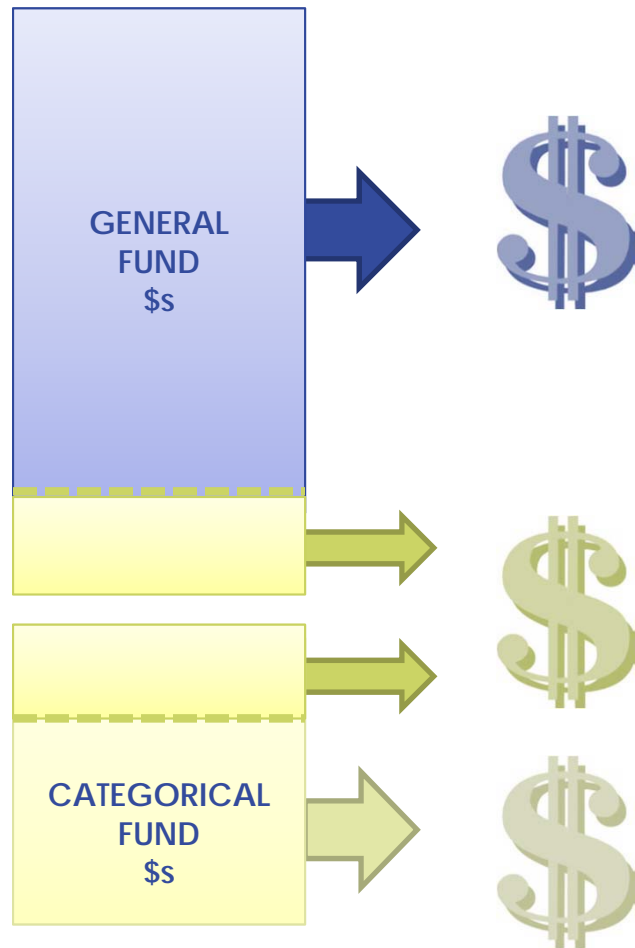
Schools will have more autonomy over their resource use and they will also be held accountable for how their resource use supports and impacts student achievement:

*So all schools will need a more in-depth understanding of strategic resource use and some schools may need additional guidance and templates/models from the district.*

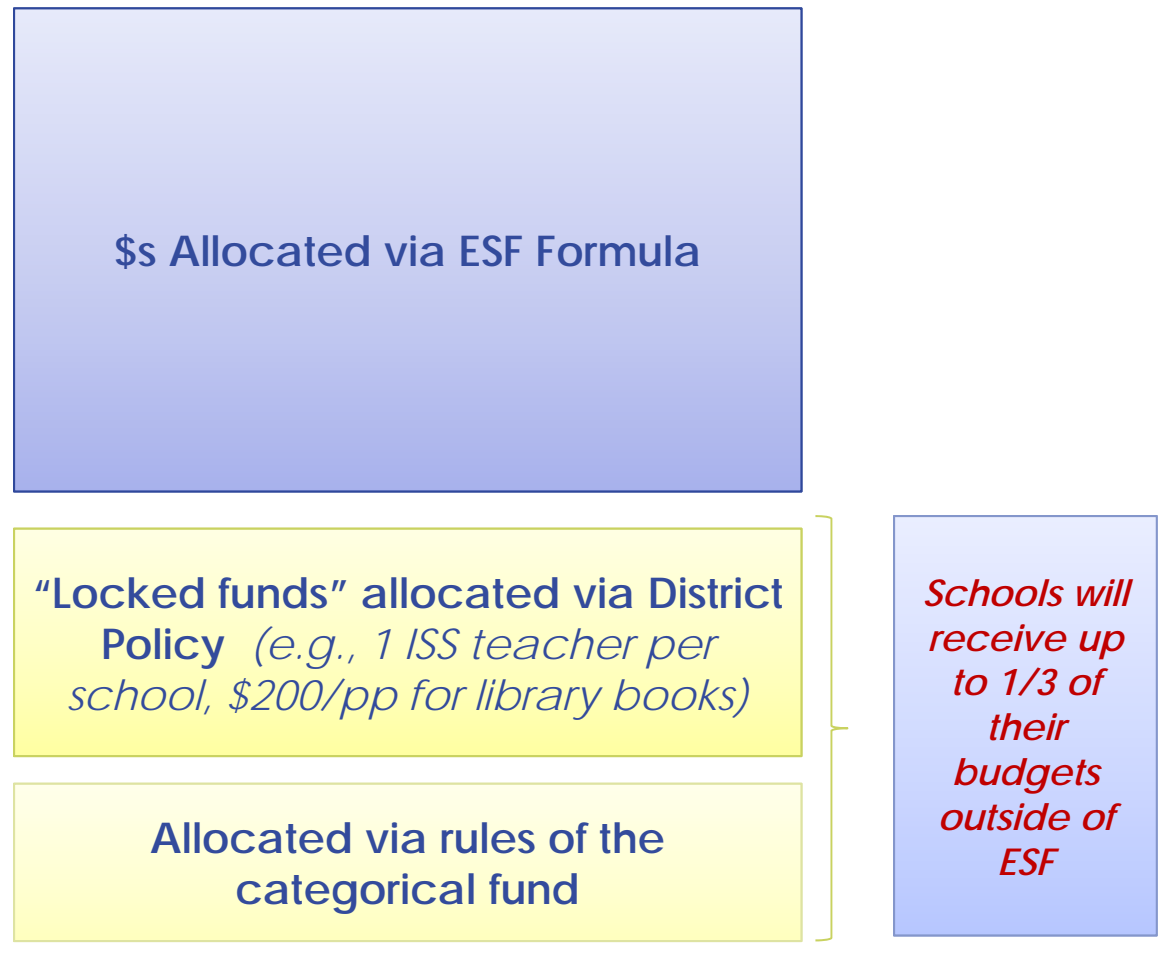


Remember that due to internal and external restrictions around the \$s that districts receive, ESF represents just 2/3s of the dollars that schools will receive

### How districts get \$s:



### How \$s get allocated to Schools:





# In the current funding system, students in different programs receive different levels of resources

## SY0910 School-based dollars per pupil by student type



Weighting	1.0	2.8x	2.1x	2.9x	3.8x	4.4x	1.3x	1.3x
# of Pupils	23.9k	2.5k	542	1.4k	508	37	1.8k	1.2k

Note: \*All but 164 Bilingual students receive ESOL services; \*\* Totals (on top of bar chart) do not include poverty allocation

Source: RCSD SY0910 Budget; RCSD SY0910 BEDS data; ERS analysis



We also know that students at different grade levels currently receive different levels of resources

## SY0910 School-Based Adjusted Spending\$/pp by School type

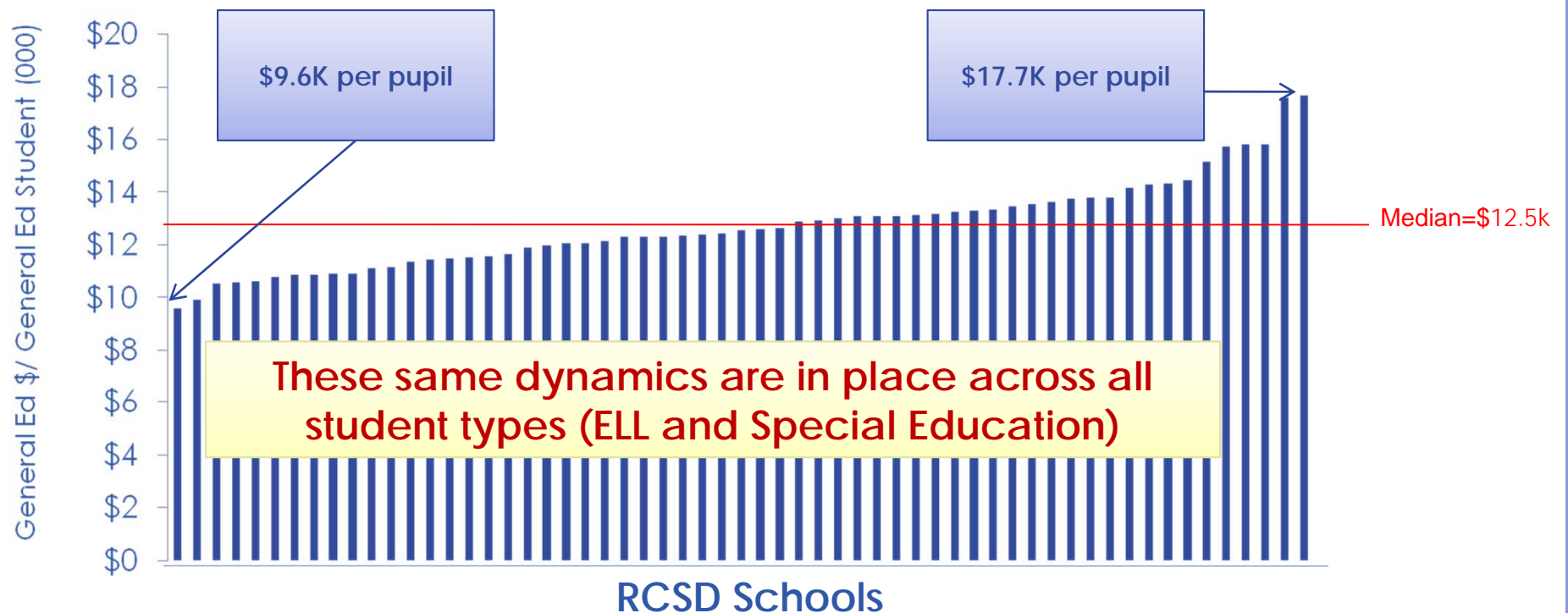


Note: All calculations are based on actual salaries, Oct 2009 BEDS data, and Oct Budget; District average includes on new school (#10) with average spending per pupil of \$21.5k; School #10 is excluded for ES average  
Source: RERS, RERS SY0910 Budget, RERS SY0910 BEDS data; ERS analysis



But those are district averages and we know that spending for the same type of students differs across schools

### SY0809: General Ed School Attributed \$/Per Pupil by School



Sources: RCSD budget 2008-09, Interviews, ERS analysis

Note: School #57 Early Childhood has been excluded from charts because pre-Kindergarten students make up one-third of school 's enrollment.



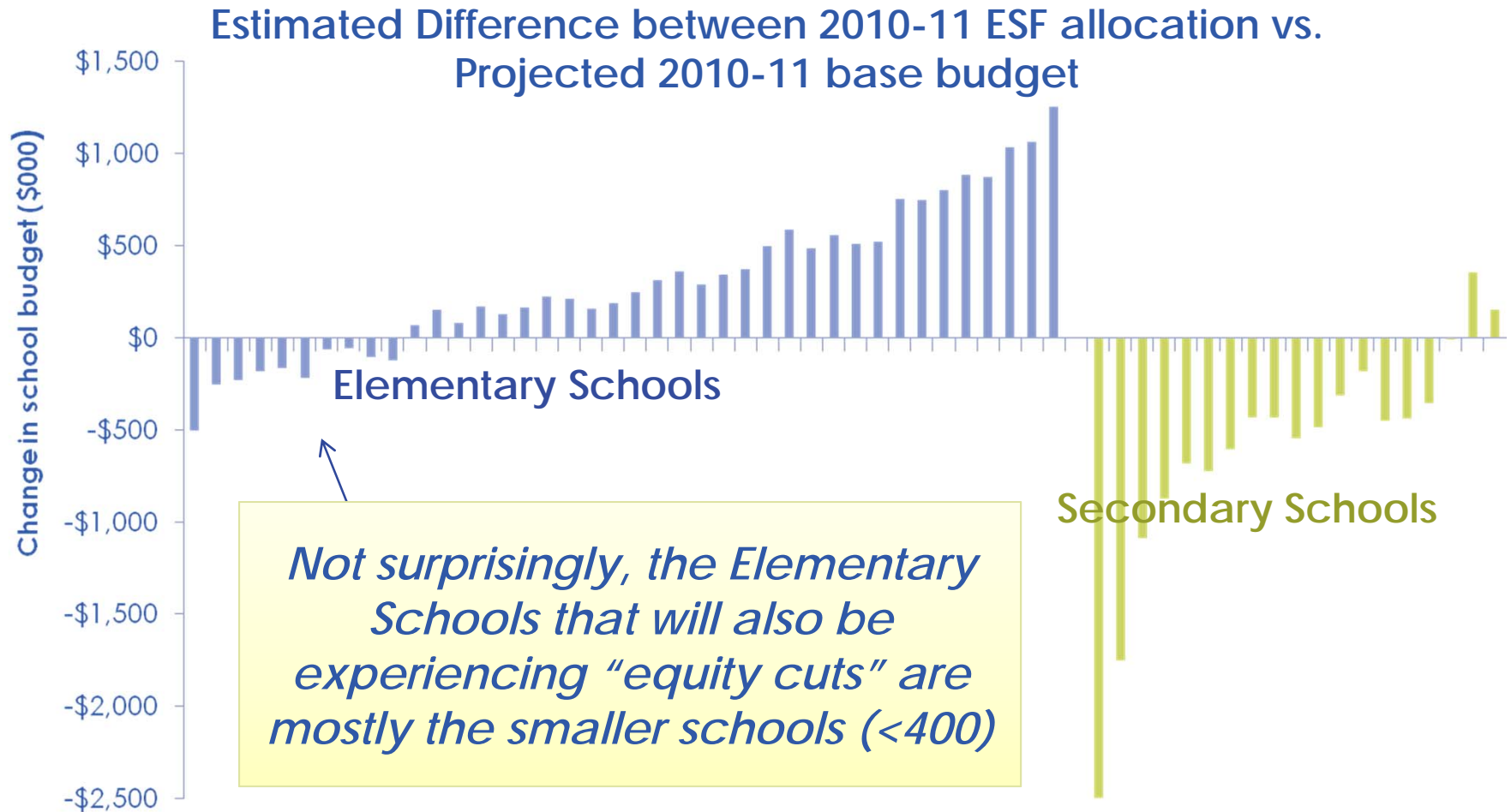
Under ESF, these pre-existing dynamics will change as every student with the same characteristic will receive the same funding, regardless of which school they attend

Student Type	District Average in 09-10 Budget <i>(but varies by school)</i>	Weights under <u>preliminary</u> <u>planning</u> WSF formula
<u>Base Student</u>		
- ES	0.9*	1.0
- SS	1.1*	1.0
- HS	1.3*	1.0
<u>Special Education</u>		
- Resource/Consultant	2.1	2.4
- Integrated Special Class	2.8	2.6
- SC 12:1	2.9	2.5
<u>ELL</u>	1.3	1.3-1.6 (by proficiency)

\*09-10 base weight calculated from unspecified unadjusted \$/pupil by school level vs. district average



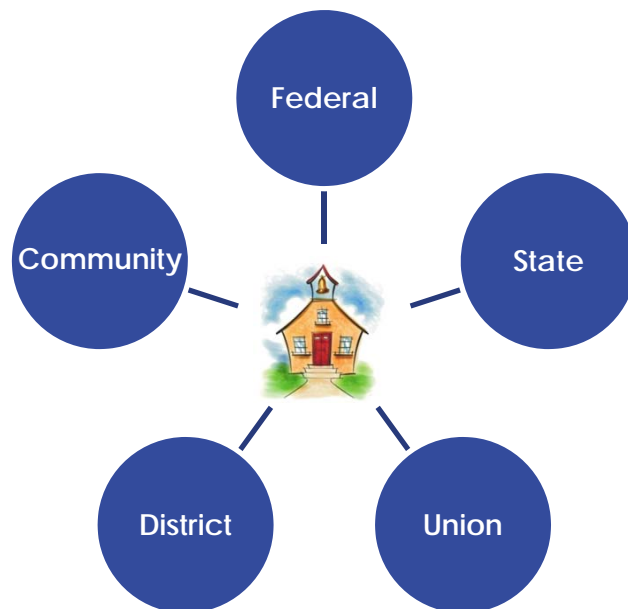
Under the proposed ESF formula, which adjusts for student type and does not have a grade weight, secondary schools will have fewer resources





# Can changing how we allocate dollars to schools really have a profound impact on teaching and learning?

- ESF/Student Based Budgeting by definition achieves EQUITY in funding across students and schools
- Student Based Budgeting on its own does not achieve SCHOOL EMPOWERMENT and AUTONOMY



Constraints on school resources

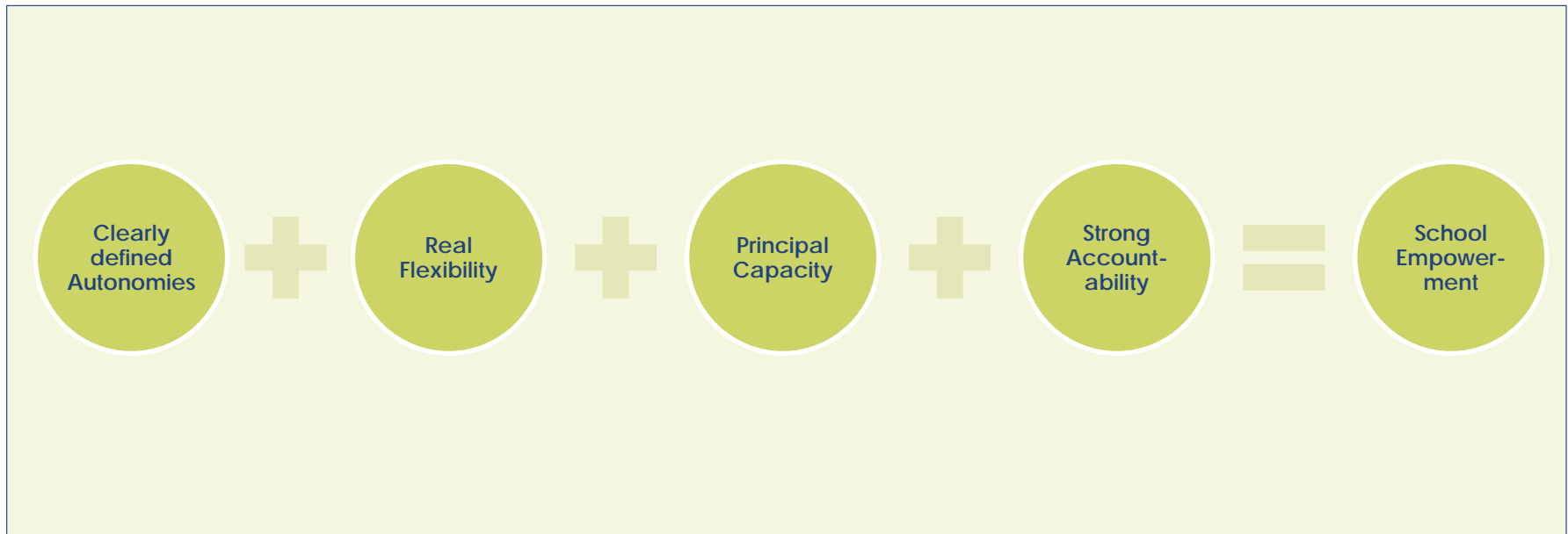
## Example:

*If a district dollarizes custodial services and distributes on a per student basis but then requires schools to purchase X number of custodians and X amount of supplies, it has achieved equity but not school empowerment.*



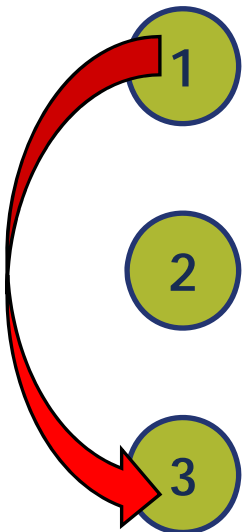
# School Empowerment and Autonomy is greater than the school budget.....

School empowerment is achieved through:



# Empowerment and Autonomy:

## How and when will the district grant autonomy?

- 
- 1 Autonomy for all, give all principals responsibility of determining which resource strategy would best improve student achievement
  - 2 Earned autonomy, give autonomy to higher-performing schools, but not lower-performing ones
  - 3 Tiered autonomy, establish tiered levels of autonomy based on performance, growth, and internal capacity assessment

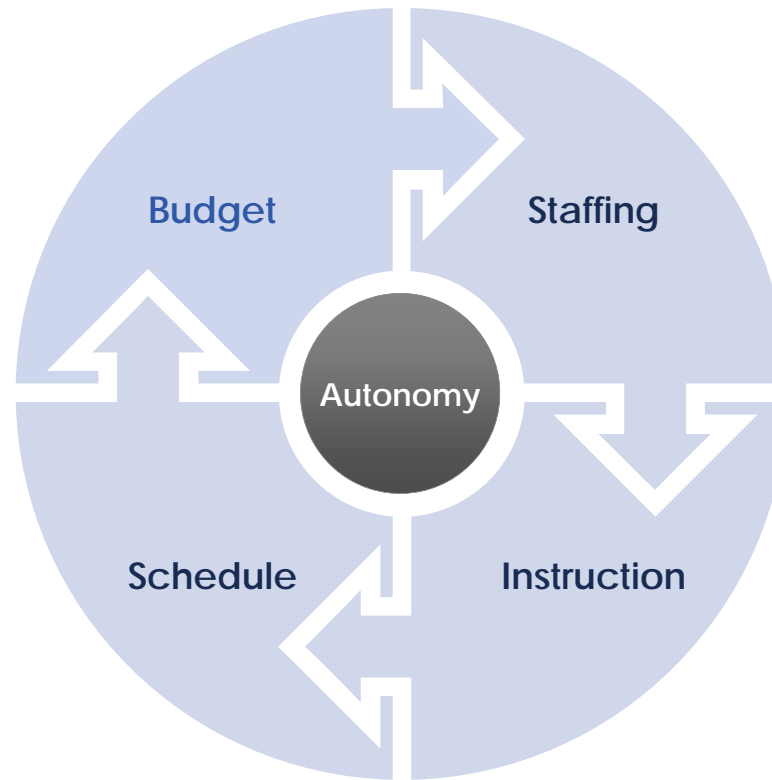


# What do we mean by School Autonomies?

Clearly defined  
Autonomies

**Budget autonomy** “the what” means giving principals freedom to chose how to spend their budget and what they want to buy (i.e., how many teachers, how many secretaries, how many assistant principals)

**Scheduling autonomy** means giving principals freedom to decide how to structure student and teacher time (i.e., school schedule, length of school day, start/end time, length of school year)

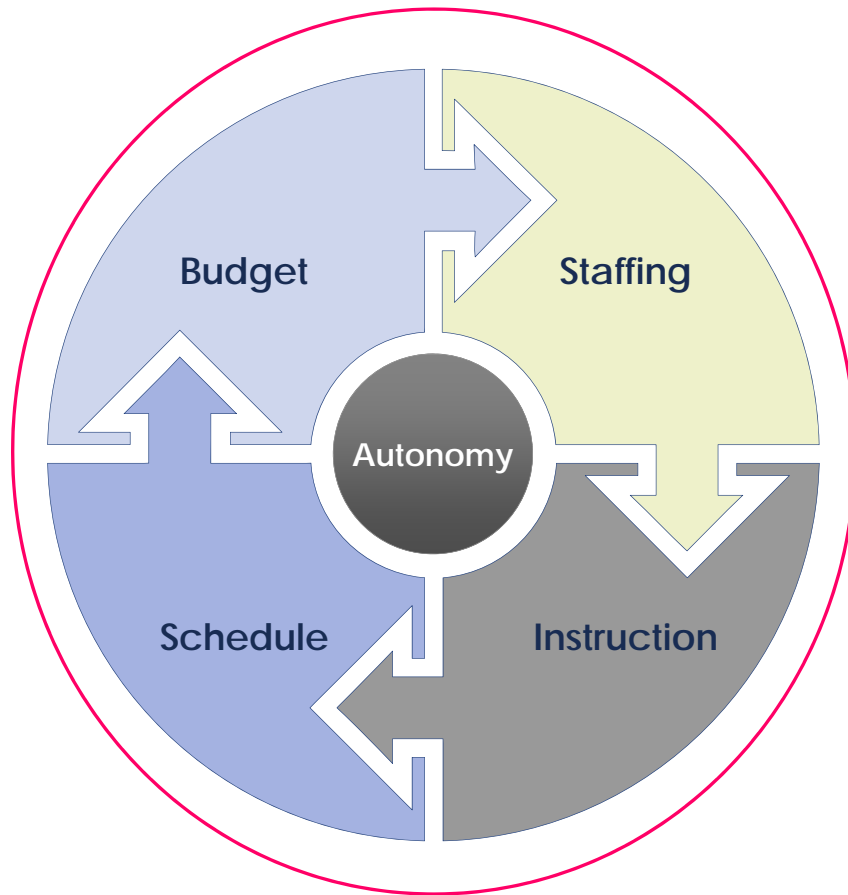


**Staffing autonomy** “the who” means giving principals freedom to chose who will fill the positions in their building (i.e., who will teach what, who will fill vacant positions)

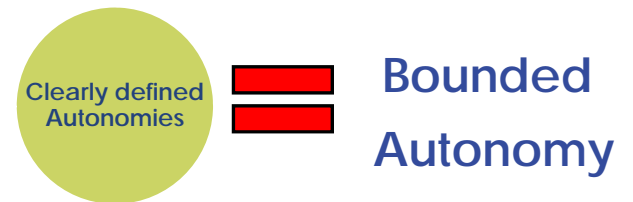
**Instruction autonomy** means giving principals flexibility over curriculum, assessment, professional development, materials etc.



# Why do Autonomies need to be clearly defined?



All four autonomies are interconnected and if flexibility is restricted in one area it may have unintended consequences of restricting resources in another area of autonomy.





## For Example:

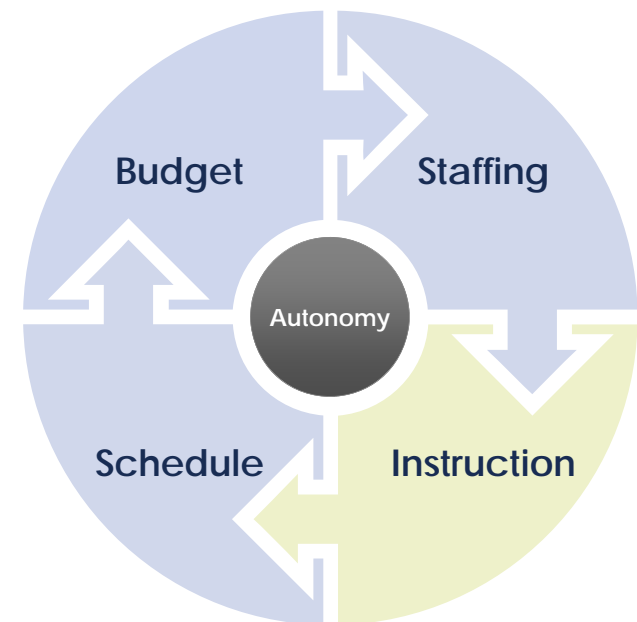
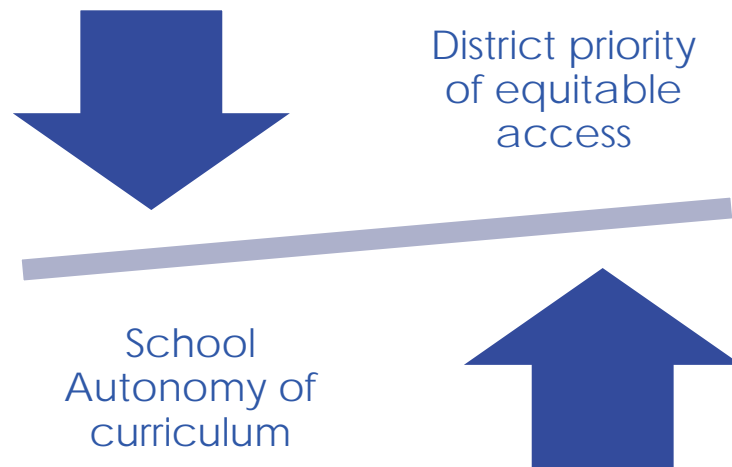
Clearly defined  
Autonomies

**Goal:** *Ensure access to Advanced Placement classes for all high school students in the district.*

**District Requirement:** *The district requires all high schools to offer 5 AP courses in specific subjects.*

**Unintended Consequences:** *A District requirement in Instruction has limited budget, staffing and scheduling.*

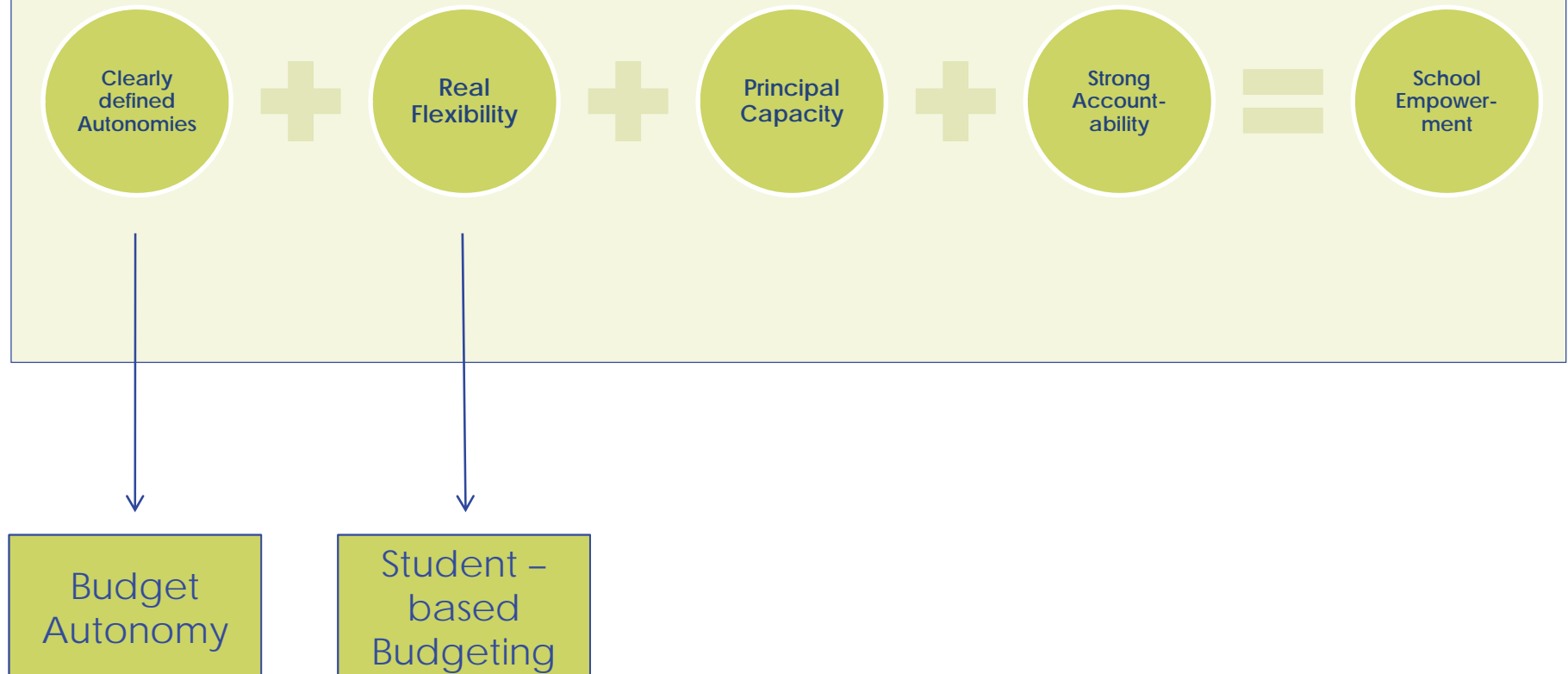
**The Trade-off that must be considered:**





# Student-Based Budgeting (ESF) Facilitates Budget Autonomy

School empowerment is achieved through:





## BUDGET AUTONOMY:

### Let's first define what we mean by School or Central Control

Budgeting autonomy refers to “how much” (not who)



#### **SCHOOL CONTROL = UNLOCKED or DEVOLVED**

- Schools are responsible for determining how much to spend and how to deliver a service or position
- Resources that will be included in the *ESF Pool* and allocated to schools based on the *ESF formula*



#### **CENTRAL CONTROL = LOCKED or RETAINED CENTRALLY**

- Central office is responsible for determining how much to spend on a service or position and/or how to deliver it
- These \$s are not included in the *ESF Pool* and are not allocated out via the *ESF Formula*

#### *Regardless of WHO controls:*

- All applicable federal, state and union requirements must be met
- Performance expectations are the same



Regardless of control (Central or Schools), a school should see all its resources to effectively budget SBB funds



## Example: Elementary School Budget

SBB Allocation	Enrollment	Weight	Total \$s
Base Weight	500	1.0 = \$4,500	\$2,250,000
ELL			
Beginner	25	0.60 = \$2,700	\$67,500
Intermediate	50	0.60 = \$2,700	\$135,000
Advanced	50	0.30 = \$1,350	\$67,500
SPED <20% time	25	1.60 = \$7,200	\$180,000
	TOTAL :		\$2.4 million

*Schools budgets must include all resources so schools can effectively allocate ESF funds*

Special Funds	
Title I Allocation	\$100,000
Title III Allocation	\$75,000
Special State fund	\$75,000
<b>Total:</b>	<b>\$250k</b>

Locked Funds	
Custodian/Cleaner	2 FTE = \$75,000
SPED TCOSE/CASE	1 FTE = \$75,000
Utilities & Maintenance	\$100,000
<b>Total:</b>	<b>\$100k + 3 FTES</b>

District Priority Program Funds	
Newcomer	\$75,000
IB Program	\$55,000
<b>Total:</b>	<b>\$100k</b>

**Total School Budget: \$3.0 million**



## For Example:

Control Category	Custodial Services
Central Control	Central Office determines the number of custodians and custodial supplies at each school. The School or Central office manages the day-to-day delivery.
School Control	School determines the total amount of custodial services they need and how those resources are used. For example, they can choose to buy only one custodian and have students participate in school up-keep as part of building ownership and community service.

Regardless of who is controlling the INPUT, the OUTCOME remains the same.

OUTCOME: Clean and safe schools.



# Steps We Completed to Defining Budget Autonomy



1. Define the universe of *potential* School Control



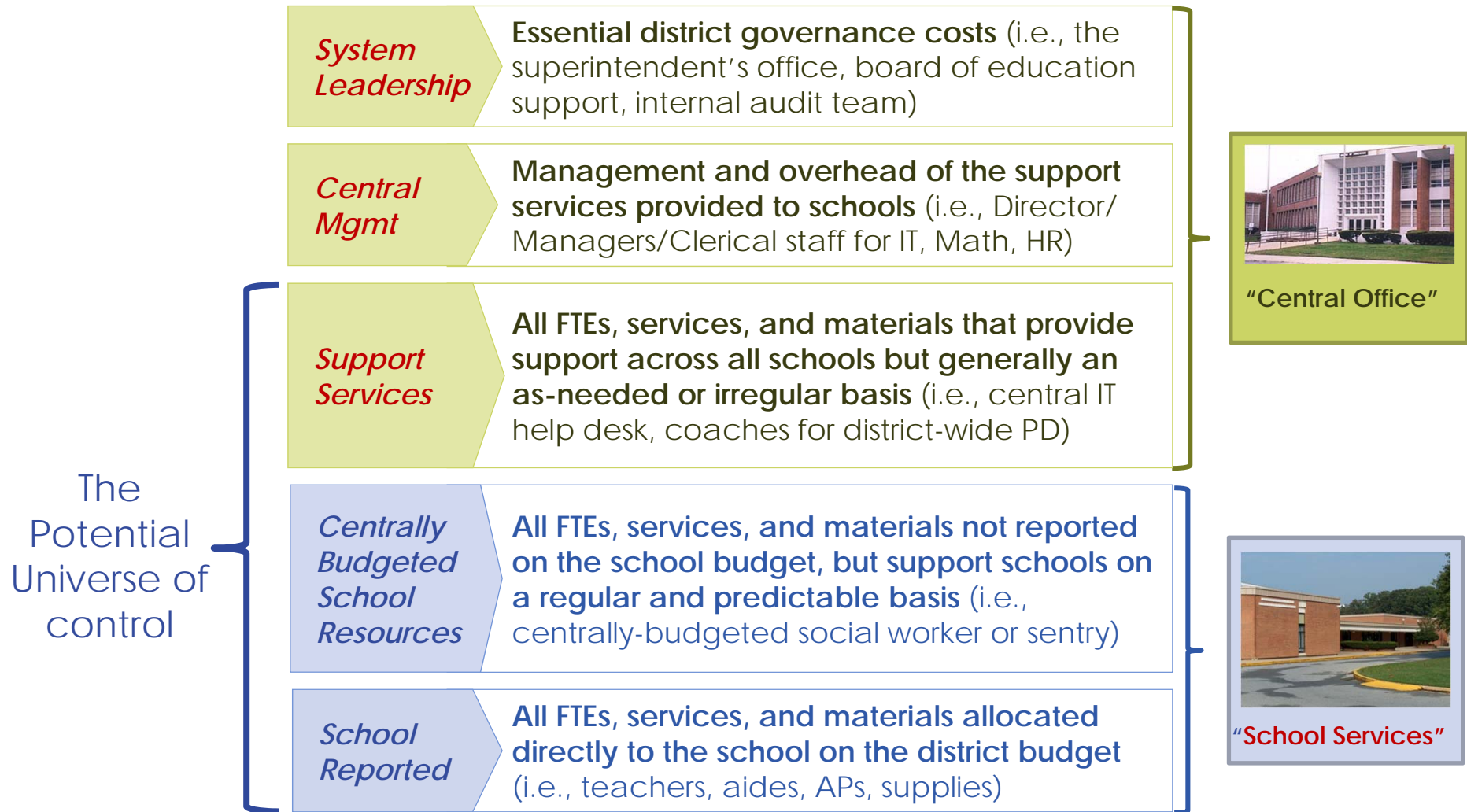
2. Map what Schools *currently* control [and the barriers to control]



3. Identify the *vision* of School Control

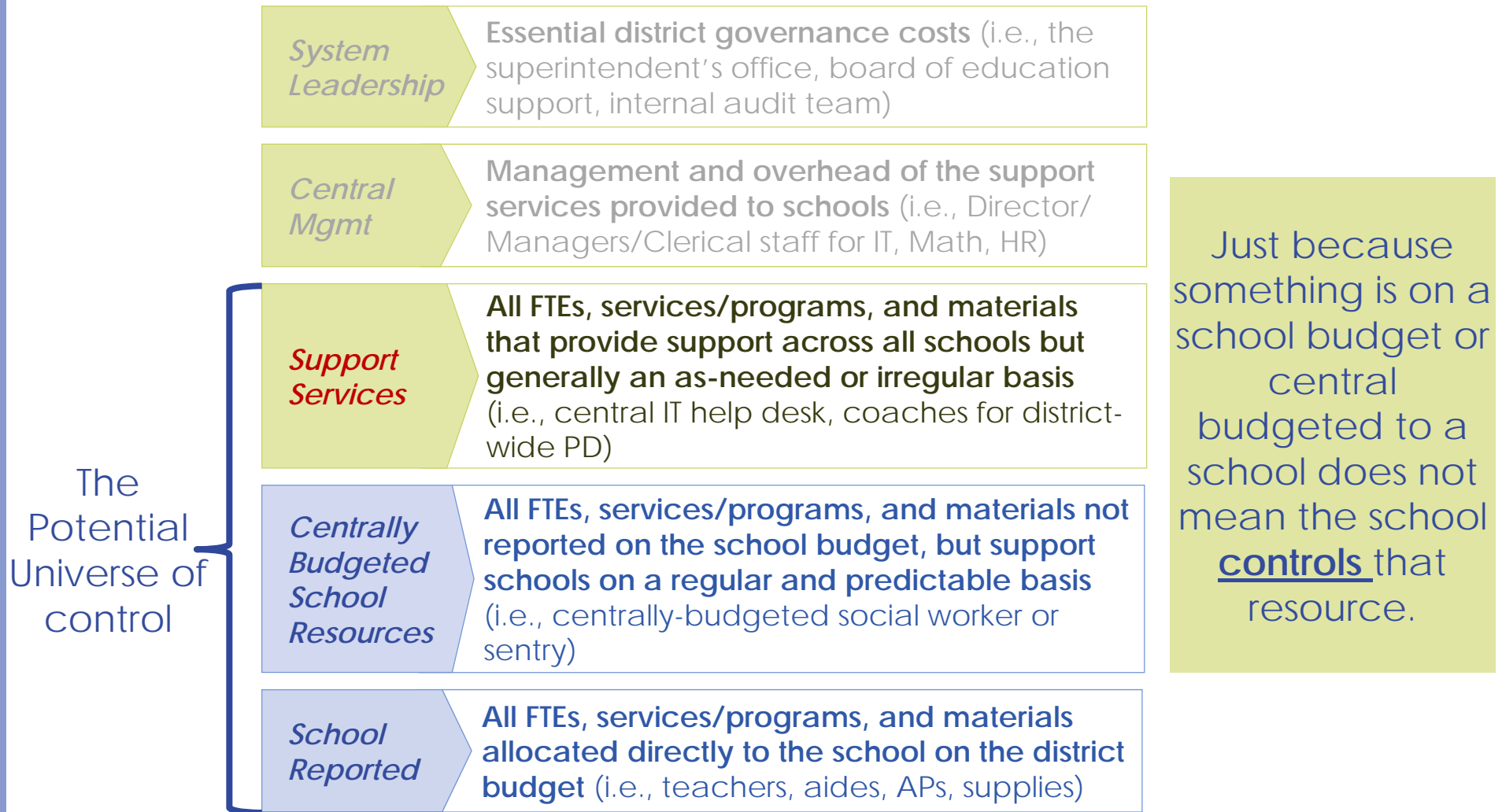


# 1. Defining the potential universe of school control





## 2. Map what schools currently control





# The level of control a school has often depends on outside restrictions

## Restrictions on Resource Use

Restriction Source	Some Examples	Ability to Influence
Federal Law	• NCLB – Supp. Ed Services	Low
State Law	• Certification Requirements • Required courses or positions	Low
Local Law	• Health and safety codes	Low
Union Contract	• Class size limits • Salary Structure	Medium
Revenue Restrictions	• Grant requirements on use	Medium
Administrative policies	• Staffing ratios	High

These restrictions don't need to define the future landscape for RCSD. Understanding restrictions allows the district to work to influence change and use flexibility within restrictions.



### 3. Define the vision of School Autonomy.

Districts have made different decisions about the balance between school and central control

	Baltimore	Cincinnati	Denver	Hartford	Houston	NYC	Oakland	SF	Seattle
ES Homeroom Teachers									
ELL Teachers									
SPED (resource)									
Nurse									
OT/PT Therapist									
Psychologist									
Assistant Principal									
Food Services									
Cleaning Staff									

\*Please see handout for additional detail  
Source: Fair Student Funding Summit



## Our framework: Unless there is a compelling district reason, schools should have autonomy over the position, the property or the program



Will control of this resource distract the principal from the district's VISION OF THE PRINCIPAL'S ROLE?



Is this resource a key CENTRAL ROLE such that devolving it impacts the district's ability to fulfill a vital function?



Is this resource a district-wide priority that the district wants each school/student to have CONSISTENT access to it?



Is this resource needed INFREQUENTLY OR UNPREDICTABLY, making it hard for schools to budget for it?



Does this resource have REQUIRED INPUT/OUTPUT such that the district is accountable for it to external source?



Does this resource have ECONOMIES OF SCALE such that the savings for centralizing outweighs desire of school control?

### YES

...to any question, consider Central control but first ask: *how will this impact the autonomies of scheduling, staffing and instruction?*

### NO

...all questions consider school control



## Let's walk through one example together: Should schools control **Instructional Coach** dollars?



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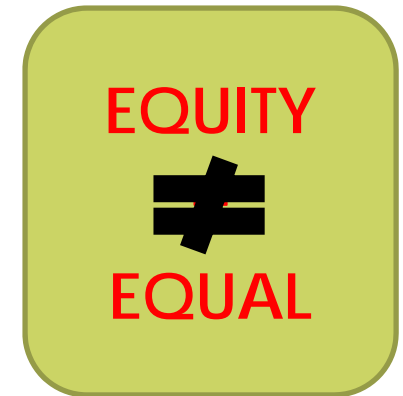


# *Horizontal Equity:* Decisions and Outputs

## DECISIONS

How does RCSD define equity across schools?

- What is an acceptable level of variation?
- What are acceptable drivers of differences?



Supporting Analysis

## OUTPUTS

New funding and staffing formula, documented and accessible for all stakeholders



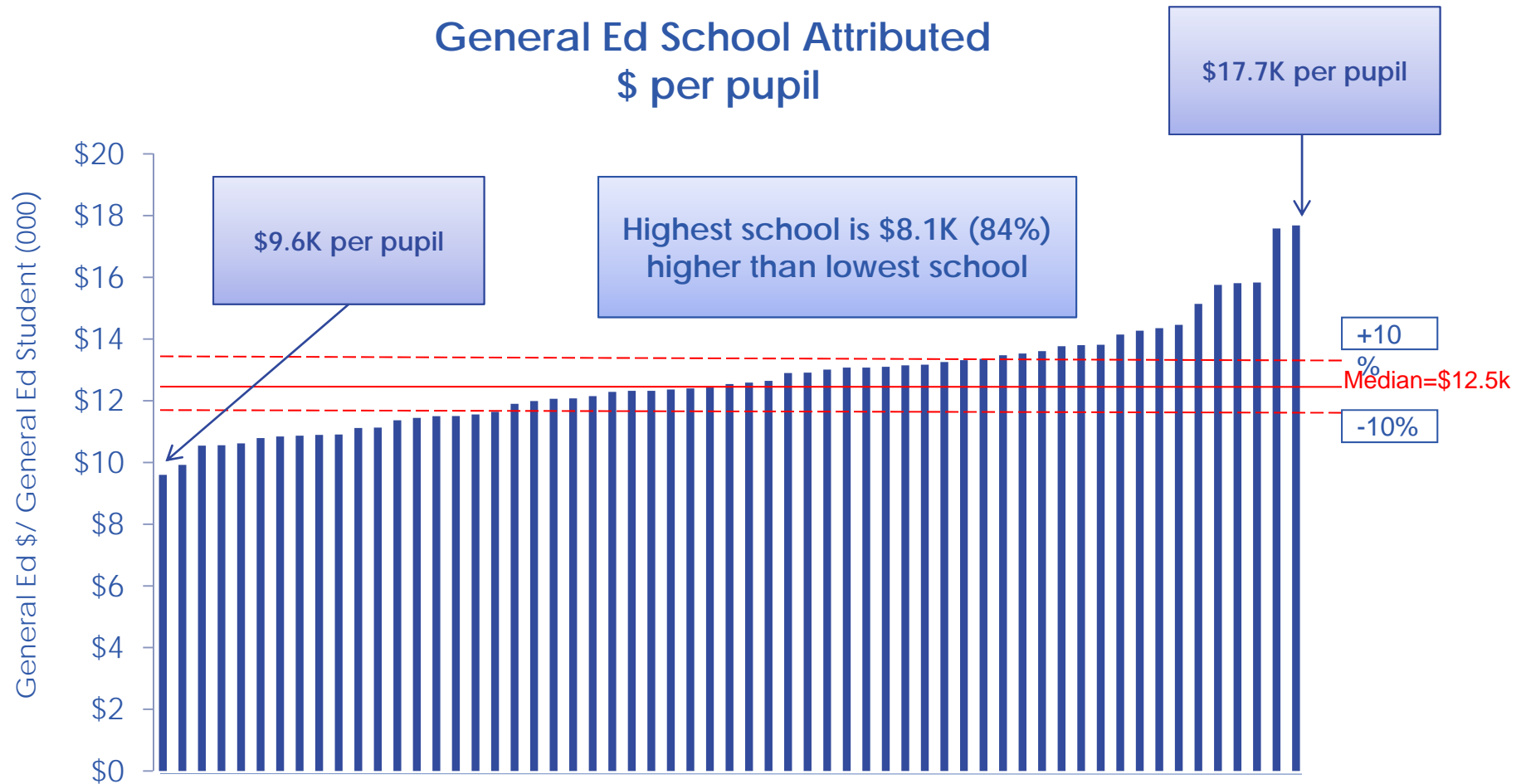
## Methodology: We looked at the allocation of resources serving general education classrooms

	Included	Excluded
<b>Resources</b>	All resources directly or indirectly serving the General Education Classroom	All resources for SpEd and LEP programs
<b>Students</b>	All students in general education classrooms	Self-contained Sped and LEAP and Bilingual

- Examining general education resources allows districts to review their own policies and practices that lead to inequity without the external requirements of special programs.
- In the spring we will review Vertical Equity and how that impacts equity across schools.



# Resource allocation varies widely across schools with 24 or 40% of schools more than 10% above or below the median

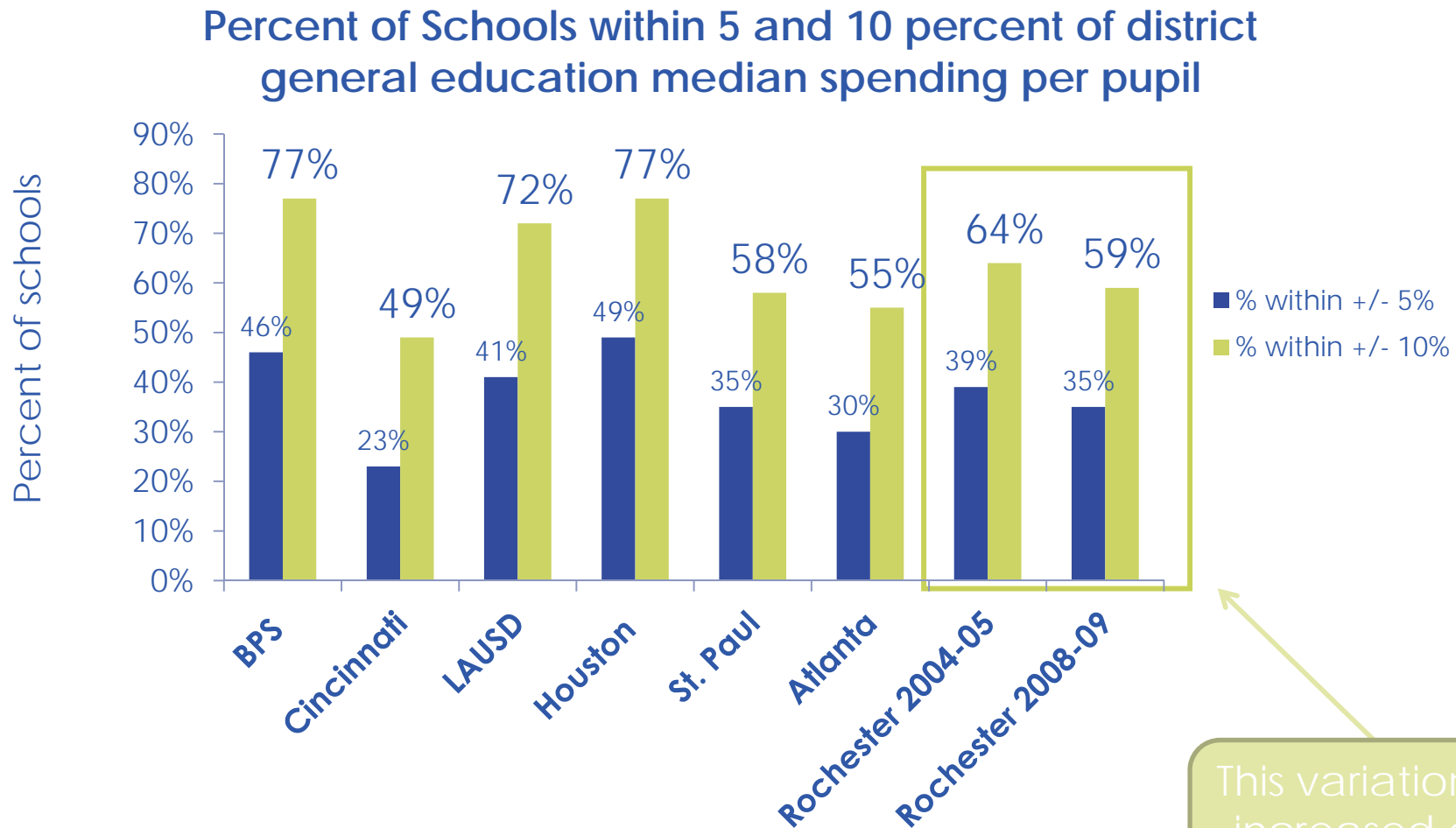


Sources: RCSD budget 2008-09, Interviews, ERS analysis

Note: School #57 Early Childhood has been excluded from charts because pre-Kindergarten students make up one-third of school's enrollment.



# RCSD has greater variance in spending across schools than several of the other districts that ERS has studied



\*\* Cincinnati and Houston have both moved to Student based budgeting systems  
These numbers reflect patterns before this move.  
Rochester spending per pupil is calculated for general education students.



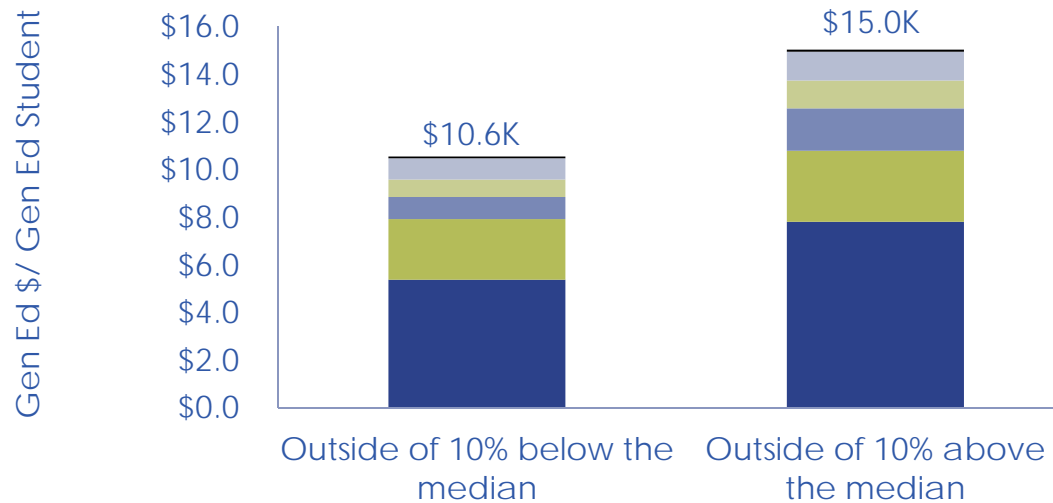
# Characteristics that might result in planned or unplanned inequity on a per pupil basis

	Characteristics	Reason for Inequity across schools
Staffing Related	Grade Levels	Different grades and different grade levels might have different needs. Ex. Smaller class sizes in K-3 or more support services in HS
	Size	Fixed positions across schools generate higher per pupil spending in smaller schools
	Staffing Allocation	Staffing allocation formulas and exceptions to this formula
	Teacher Compensation	Schools with more experienced teachers are funded at a higher rate; district may also choose to reward teachers to teach at low performing schools
Non-Staffing related	Interventions based on performance	Low-performing schools may receive more resources to help improve
	Program Placement	Special programs (art, gifted, career) placed at specific schools may have additional staff or resources associated with them.
	Building condition and size	Older building may have more need for up-keep, size of building relative to enrollment may increase costs, especially for schools that are not enrolled close to capacity
	Shared Facility	Co-located schools might share services and cost (food services, et)
	Location	School geography may warrant different costs, such as security, etc.



# **Staffing and Salary: Spending on teacher compensation is the primary driver of the difference between highest and lowest funded schools**

**General Ed School Attributed \$/pupil**

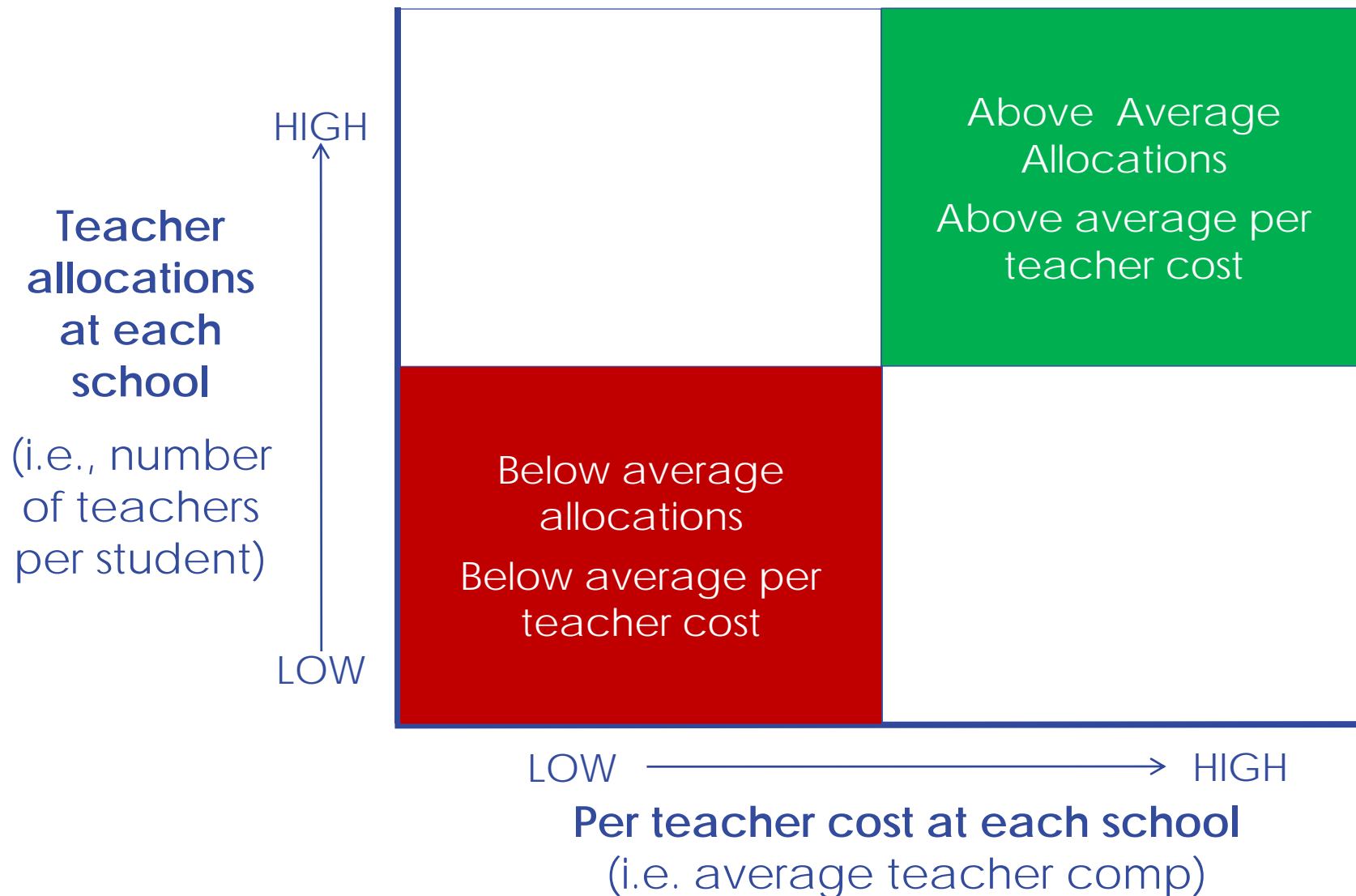


	12 schools	12 schools	Difference	Diff%
■ Business Services	\$70	\$90	\$20	<1%
■ Instructional Support & PD	\$900	\$1,210	\$310	7%
■ Pupil Services	\$730	\$1,170	\$440	10%
■ Leadership	\$930	\$1,780	\$850	19%
■ Operations & Maint	\$2,540	\$2,980	\$440	10%
■ Instruction	\$5,390	\$7,810	\$2,420	54%
TOTAL	\$10,560	\$15,040	\$4,480	100%

Sources: RCSD budget 2008-09, Interviews, ERS analysis ; Note: School #57 Early Childhood has been excluded from charts because pre-Kindergarten students make up one-third of school 's enrollment. Middle include Nathaniel Rochester #3 MS, Wilson Foundation, School Without Walls Foundation

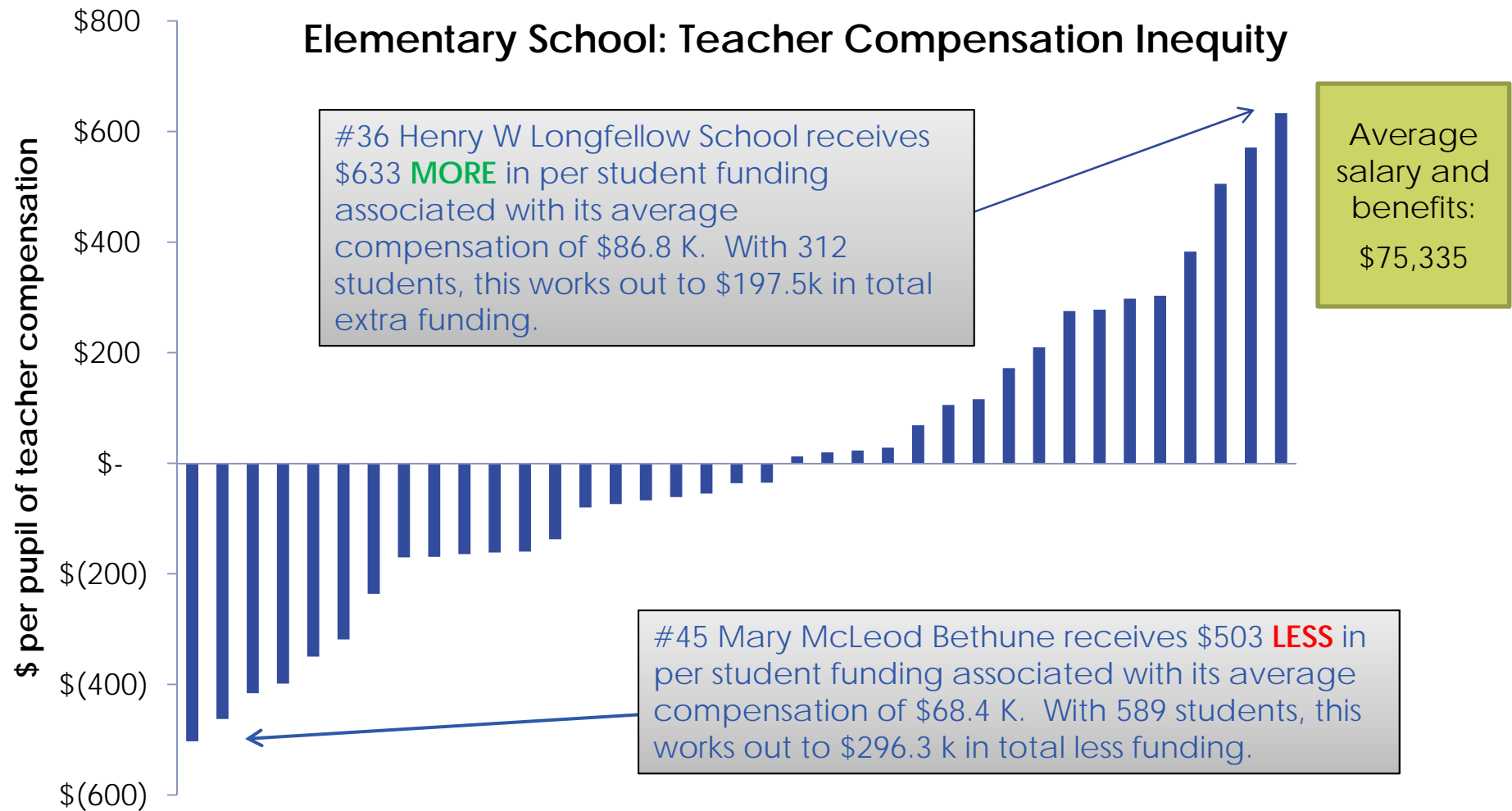


# Teacher spending has two components that drive inequity





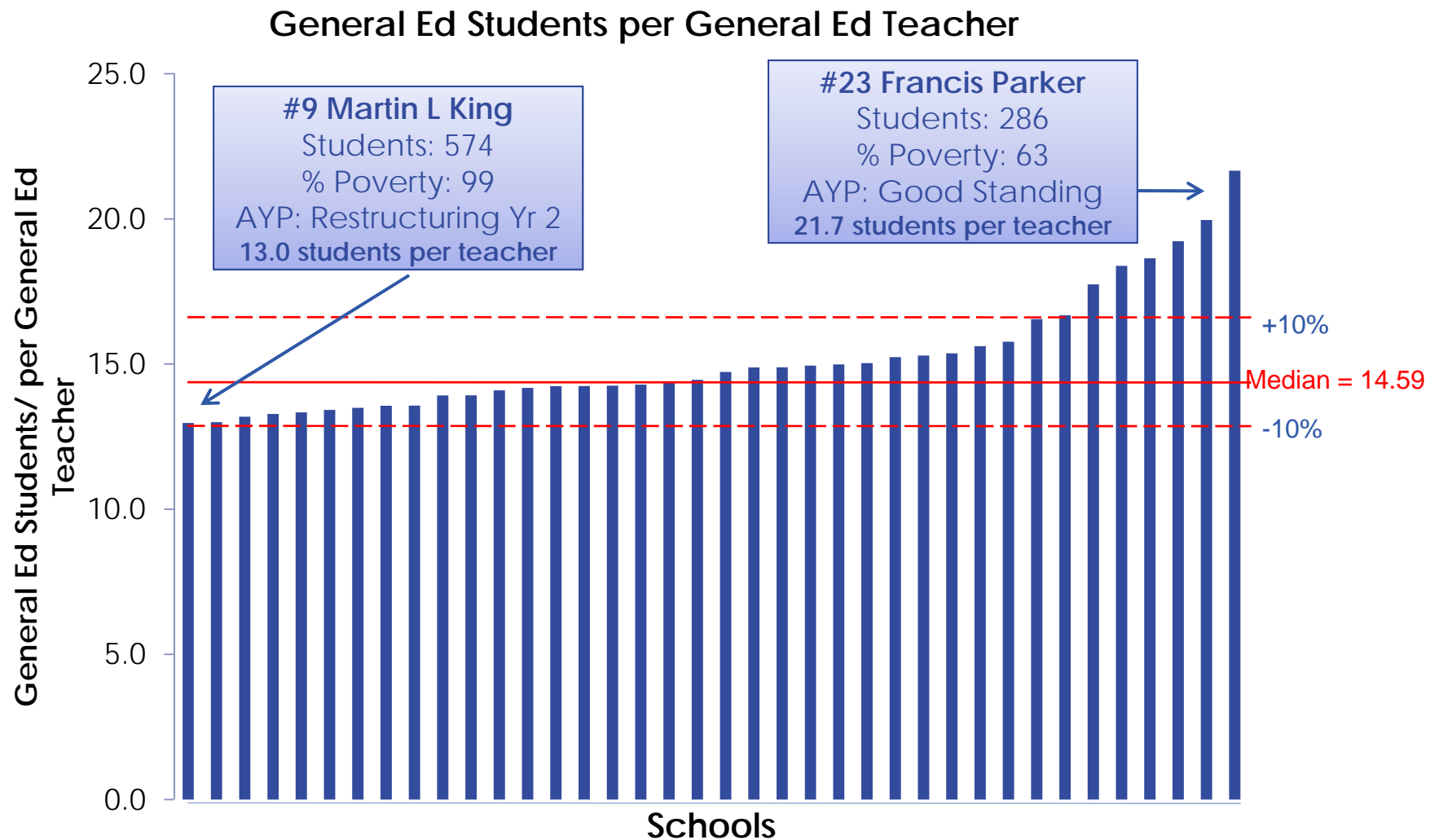
# Looking at ES, teacher compensation variation across schools contributes to this inequity



Sources: RCSD budget 2008-09, Interviews, ERS analysis ;



# Staffing allocation practices are also a significant driver

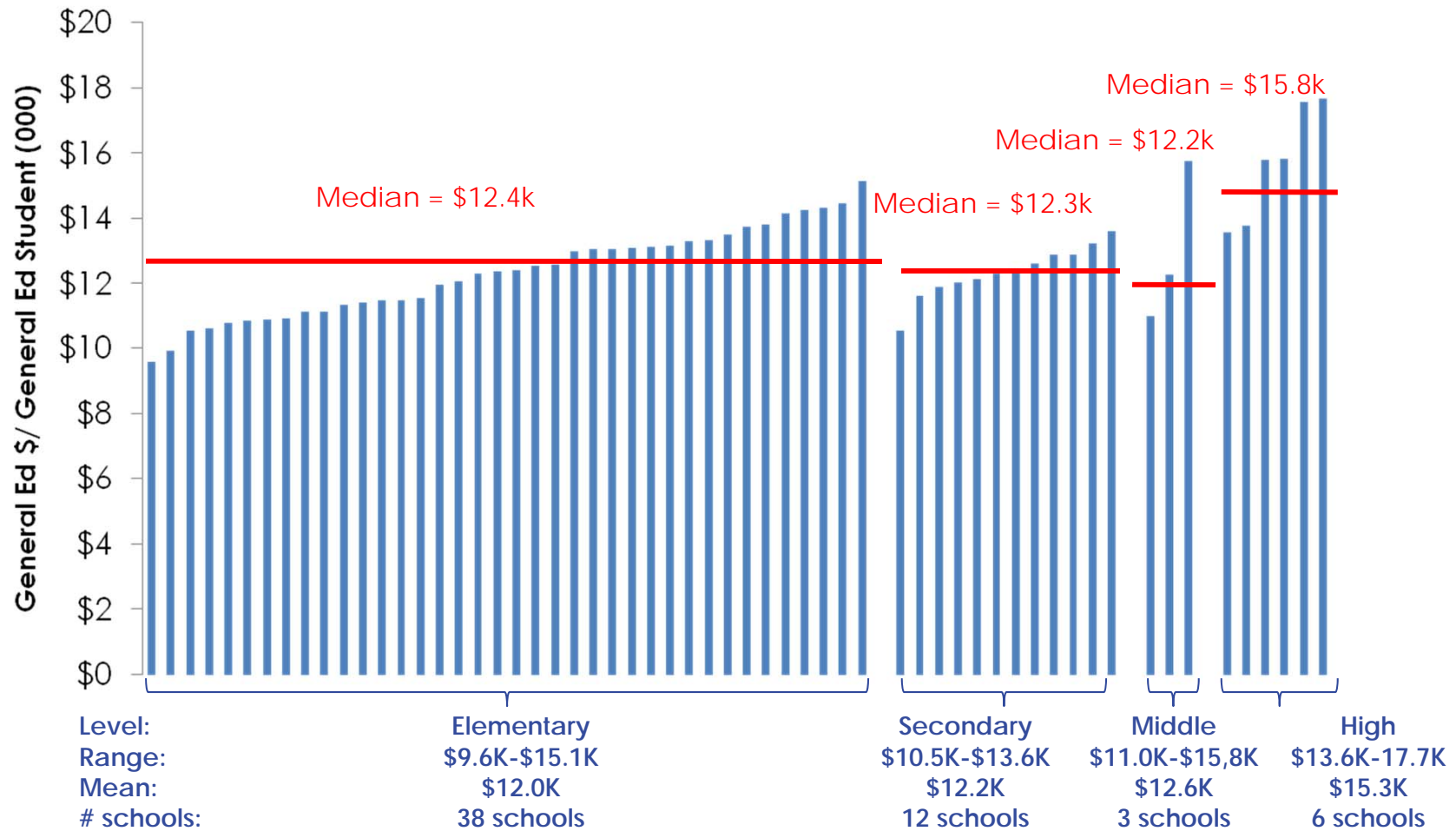


Sources: RCSD budget 2008-09, Interviews, ERS analysis ; Note: School #57 Early Childhood has been excluded from tables because pre-Kindergarten students make up one-third of school 's enrollment.



# Variation in spending per pupil also exists within grade levels

## General Ed \$ per pupil



Note: School #57 Early Childhood has been excluded from charts because pre-Kindergarten students make up one-third of school 's enrollment.

Sources: RCSD budget 2008-09, Interviews, ERS analysis



# Today's Objectives

Background, Strategic Alignment  
and Principal Engagement

Equitable Student Funding Details –  
Budget and Autonomy

Equity Work

**Weights “Aligning cost with  
Services”**

Strategic Support to Schools  
“Building Capacity and Success”

Enterprise Planning Module (EPM) And  
ESF Management Tools “How Will  
Schools Develop Their Budgets”



# Key questions for evaluating a funding system to resolve equity issues

- Funding level: how much goes to schools?
- Funding control: how much flexibility do principals have?

- Funding distribution: who gets what?

What student characteristics to weight?

How much to weight those student characteristics?

- Funding use: what do schools do with resources?



Under ESF, total school budgets will be comprised of ESF allocations as well as categorical funds, centrally controlled resources, and district portfolio program funds



### Example: Elementary School Budget

SBB Allocation	Enrollment	Weight	Total \$s
Base Weight	500	1.0 = \$4,500	\$2,250,000
ELL			
Beginner	25	0.60 = \$2,700	\$67,500
Intermediate	50	0.60 = \$2,700	\$135,000
Advanced	50	0.30 = \$1,350	\$67,500
SPED <20% time	25	1.60 = \$7,200	\$180,000
	TOTAL :		\$2.4 million

*Schools budgets must include all resources so schools can effectively allocate ESF funds*

Special Funds	
Title I Allocation	\$100,000
Title III Allocation	\$75,000
Special State fund	\$75,000
<b>Total:</b>	<b>\$250k</b>

Locked Funds	
Custodian/Cleaner	2 FTE = \$75,000
SPED TCOSE/CASE	1 FTE = \$75,000
Utilities & Maintenance	\$100,000
<b>Total:</b>	<b>\$100k + 3 FTES</b>

District Priority Program Funds	
Newcomer	\$75,000
IB Program	\$55,000
<b>Total:</b>	<b>\$100k</b>

**Total School Budget: \$3.0 million**



## Why are these other components of the School Budget not included in the ESF pool?

Special Funds	
Title I Allocation	\$100,000
Title III Allocation	\$75,000
Private Grants	\$75,000
<b>Total:</b>	<b>\$250k</b>



These funds often have separate restrictions and/or formulas for student and school allocation

Locked Funds	
Custodian/Cleaner	2 FTE = \$75,000
SPED TCOSE/CASE	1 FTE = \$75,000
Utilities & Maintenance	\$100,000
<b>Total:</b>	<b>\$100k + 3 FTES</b>



There is a compelling district reason to control what and how much each school gets (see next slide)

District Priority Program Funds	
Newcomer	\$75,000
IB Program	\$55,000
<b>Total:</b>	<b>\$100k</b>



District priority programs at specific schools that require consolidation for quality of service



# What is a "weight"?

Under SBB, schools will receive \$s based on the needs of the students at their school, for example:

**Weight** - the additional \$s given to categories of students to reflect the increased cost to serve their learning needs

**Base** - the \$s that all students receive

Mark



$$1.60 = \$8,000$$

Maria



$$1.45 = \$7,250$$

SPED Resource  
 $0.5 = \$2,500$

Poverty  
 $0.1 = \$500$

Base Weight  
 $1.0 = \$5,000$

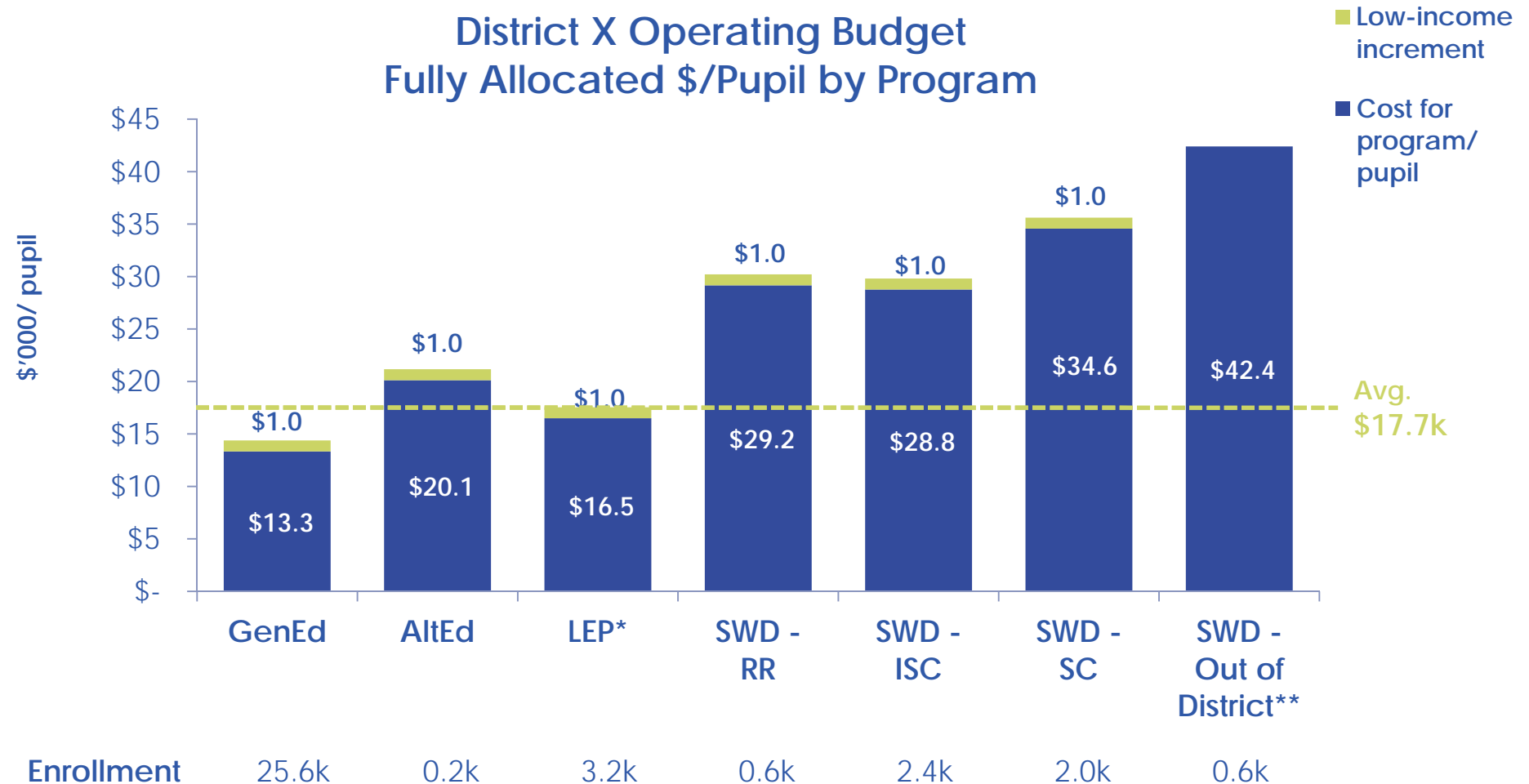
ELL  
 $0.4 = \$2,000$

High School  
 $0.05 = \$250$

Base Weight  
 $1.0 = \$5,000$



## RCSD already "weights" different types of students through its staffing formula....

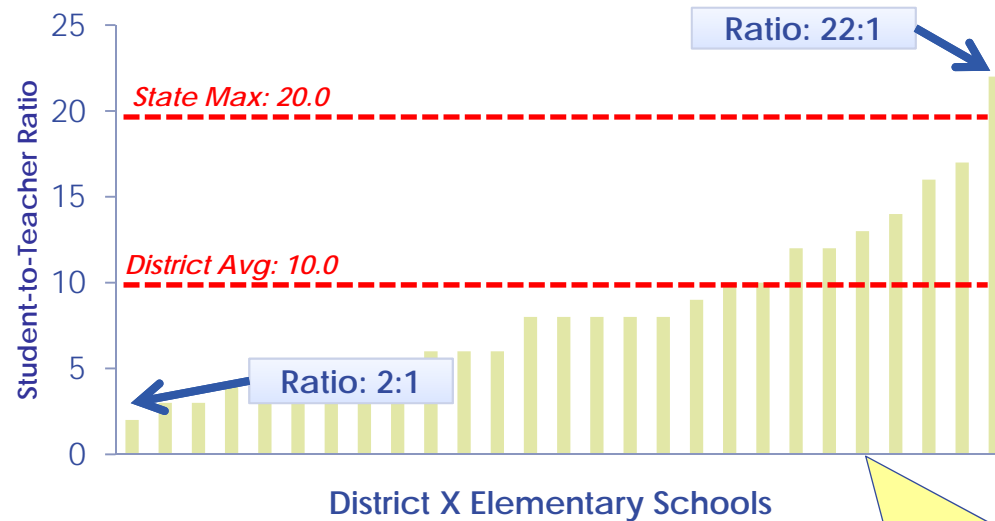


\* Excludes DL at SS and DI English at ES2. \*\* District placed only  
Source: RCSD Amended (Nov) budget, BEDS Enrollment



... but like most staffing formula systems, is not transparent or equitable as it could be and students with the same characteristics are often funded differently across schools

District X SPED Resource Student-to-Teacher Ratio by School





But districts don't necessarily weight them all, instead, districts weight only the characteristics that make sense given the *district's academic strategy and demographic context*

	Baltimore	Cincinnati	Denver	Hartford	Houston	NYC	Oakland	SF	Seattle	Rochester
Foundation Amount				✓	✓	✓		✓	✓	
Grade		✓		✓	✓	✓	✓	✓	✓	
Perf-High	✓			✓	✓					
Perf-Low	✓	✓		✓		✓	✓			
Poverty	✓	✓	✓		✓	✓	✓	✓	✓	✓
SPED	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ELL		✓		✓	✓	✓	✓	✓	✓	✓
Other		✓			✓	✓				

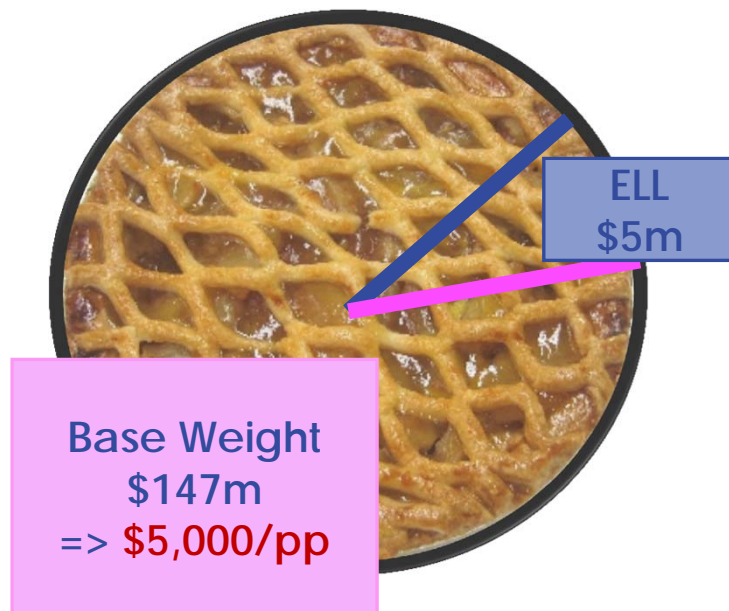
Pseudo weight from Title I



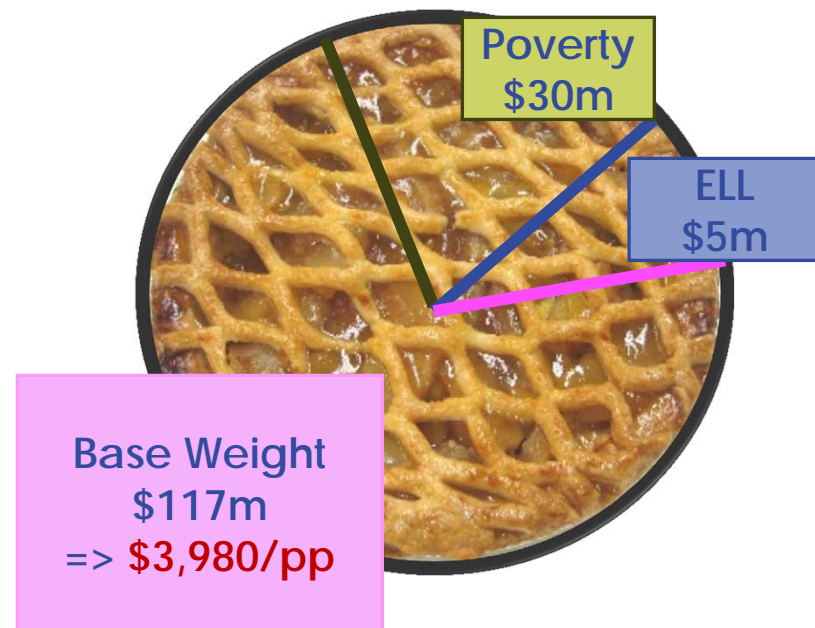
Remember: The district has a limited pool of money, so the more characteristics you weight OR the more money you give a certain characteristics, the less money there is for everyone else

For example: The impact of adding a poverty weight...

### Current Weight



### Adding poverty weight



*Assumes total WSF Pool of \$152m*



... or in other words, if you weight certain grades because you believe they need additional services, you are implicitly saying that other grades need fewer services

No  
Grade  
Weight

*Everyone gets the same \$4,077/pp*



Grade  
Weight  
of  
\$750/pp  
for K-3,  
7-9





## A potential framework for thinking about “what to weight”:



Are we supporting a **DISTRICT PRIORITY** by deciding to weight this student characteristic?



What type of **ADDITIONAL SUPPORT SERVICES** do students with these characteristics need (i.e., what do we expect schools to do with the extra dollars)?



Is this characteristic both **SUFFICIENT AND UNIQUE** within the district’s overall population to merit weighting?



Does the district have the ability to **TRACK AND PROJECT ENROLLMENTS** for this characteristic?



Does this student characteristic **CORRELATE WITH ANY OTHER CHARACTERISTIC** such that we might be double-weighting?



## Are we supporting a district priority by weighting this student characteristic?

- Since the district has a limited amount of funding, the more characteristics it chooses to weight, the fewer \$s will be available for each weight
- So the district should only be weighting student characteristics that reflect a current district academic strategy and priority



Cutting more slices => smaller slices!

For example: Poverty (FRL) students



Is supporting low-income students a specific district academic strategy and priority?



## Does the district believe that additional resources are required to appropriately serve this student characteristic?

- What type of additional support services do students with these characteristics need?
  - ✓ Extra instructional support – in the form of smaller class sizes, extended learning time, greater individual attention, etc?
  - ✓ Extra socio-emotional support – in the form of additional counselors, physical and mental health programs, etc.?
  - ✓ Other types of support?



For example: Poverty (FRL) students



Low-income students may need both additional instructional and social-emotional support to achieve at the same level as their peers



## Is this student characteristic sufficient and unique within the district's overall population to merit weighting?

- Are there a sufficient number of students with this characteristic in the district such that it makes sense to weight them?
- Is this student characteristic so pervasive across the district such that almost all students would be weighted?



For example: Poverty (FRL) students



RCSD is ~90% FRL – so almost all students would be eligible for this weight – it makes more sense to build the additional support into the base weight that all students receive



## Does the district have the ability to track and project enrollments for this student characteristic?

- Since WSF budgets are developed in the spring preceding the school year, the district can only weight characteristics for which it can reasonably track and predict accurate enrollments
- Otherwise, doing mid-year adjustments will be a painful process for schools



For example: Poverty (FRL) students



The district should be able to reasonably track and project FRL status based on historical enrollment and demographic shifts



## Does this student characteristic correlate with any other characteristic such that we might be double-weighting?

- Weights are additive (i.e., students receive all the weights that they are eligible for)
- So if a student is already receiving additional support for being X, do they need more resources for being Y?
- Or do those characteristics have different needs that require different resources?



For example: Poverty (FRL) students



Some research indicate that there may be strong correlation between FRL status and low academic performance, particularly at the elementary school grade levels



# TO WEIGHT OR NOT TO WEIGHT:

## Here are some important questions to consider

Are we supporting a ***district priority*** by weighting this student characteristic?

NO

YES

Does the district believe that ***additional resources are required*** to appropriately serve this student characteristic?

NO

YES

Is this student characteristic ***sufficient and unique*** within the district's overall population to merit weighting?

NO

YES

Does the district have the ability to ***track and project enrollments*** for this student characteristic?

NO

YES

Does this student characteristic correlate with any other characteristic such that we might be ***double-weighting***?

YES

YES

DO NOT WEIGHT

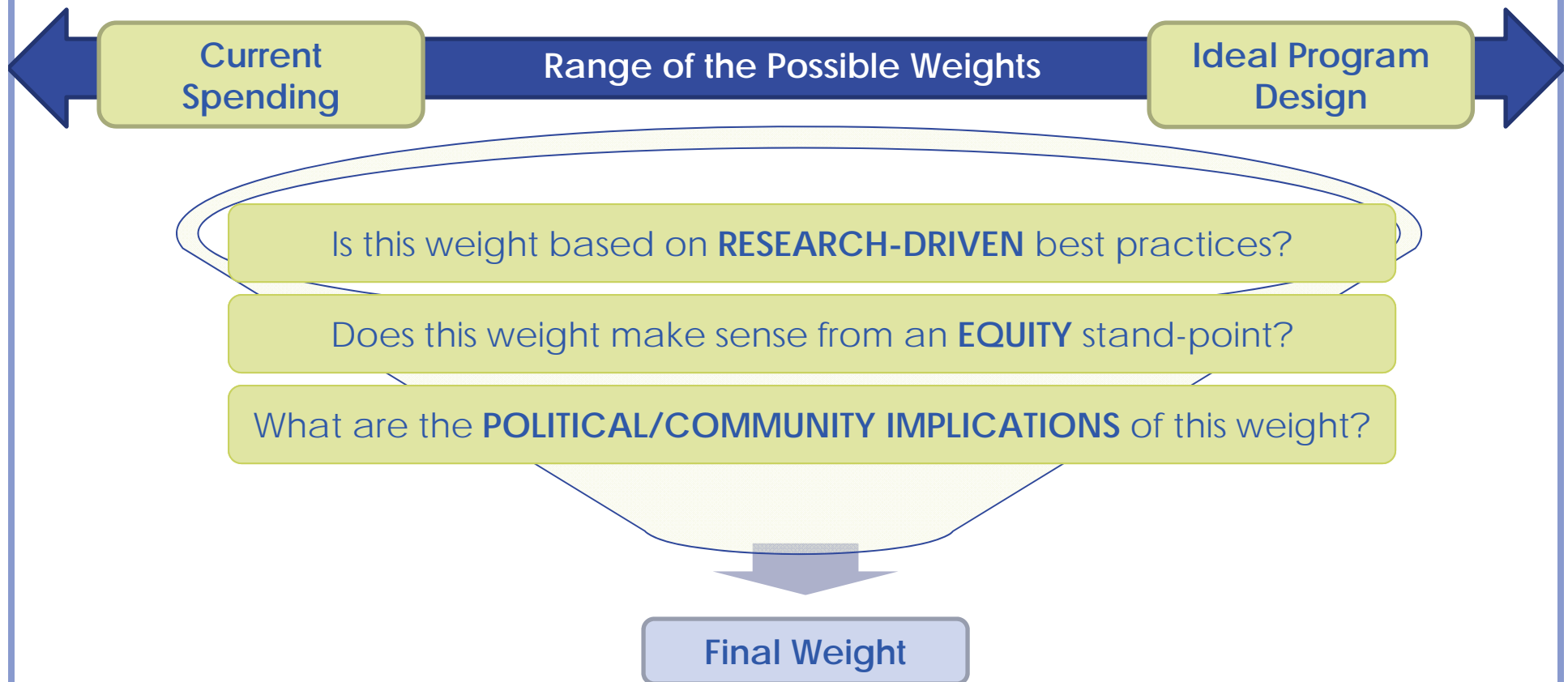
WEIGHT this characteristic



## When thinking about how much to weight characteristics in the SBB formula – RCSD examined the following:

How much does the district currently spend to serve this characteristic?

How much would the district “ideally” want to spend?

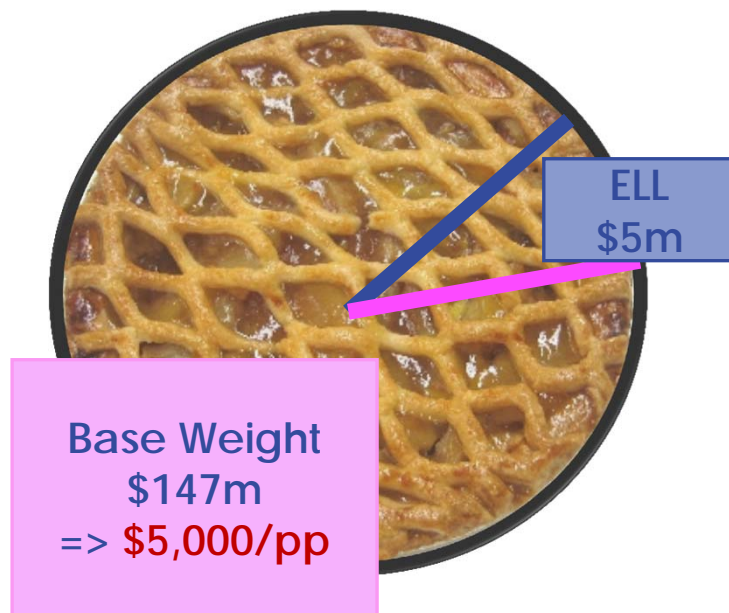




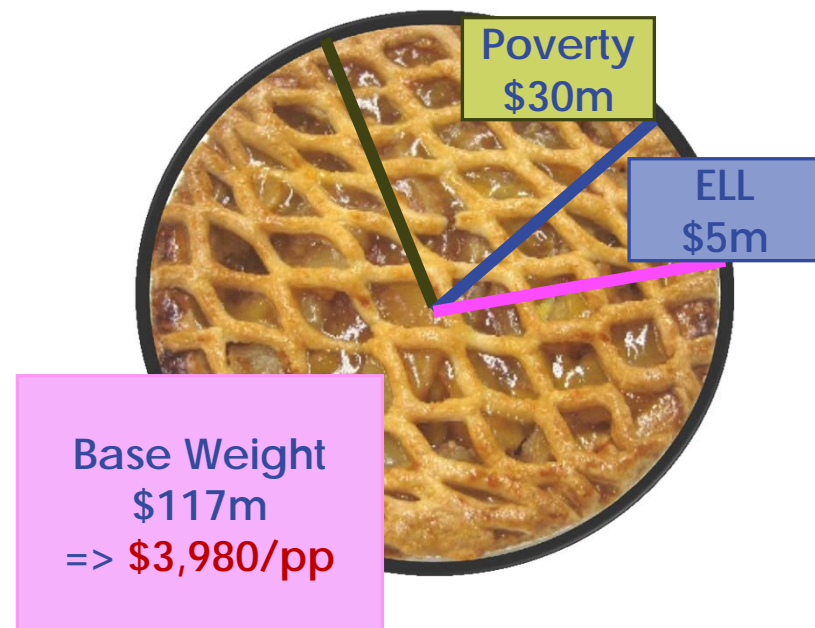
Remember: The district has a limited pool of money, so the more characteristics you weight OR the more money you give a certain characteristics, the less money there is for everyone else

For example: The impact of adding a poverty weight...

### Current Weight



### Adding poverty weight



*Assumes total WSF Pool of \$152m*



## There are two ways that districts can assign weights to student characteristics: setting ratios or setting dollar values

1

### Bottom Up Approach

- Creating SBB formula by “building the pie”
- Determined the cost of the additional services, **balancing the need to cover baseline services**

2

### Top Down Approach

- Creating SBB formula by setting ratios
- Determined by fixing ratios relative to general education students – **the baseline services**



# Building the Pie: For example, RCSD developed the following weights based on their service delivery model and target fill rates for ELL:

	\$	Weight	NYS ESOL Mandate: 1 unit=36 min	ESOL teacher -to-Unit Ratio	# of kids an ESOL teacher can see a day
Base Weight	\$3,866	1.00			
ELL/LEP	-	-			
<i>Beginner K-8/Int. K-12</i>	\$2,292	0.59	2 units/day	1 tchr. to 50 units	25 students
<i>Beginner 9-12</i>	\$3,437	0.89	3 units/day		16.67 students
<i>Advanced K-12</i>	\$1,146	0.30	1 unit/day		50 students

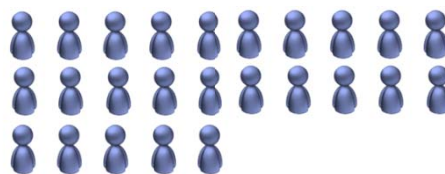


**Avg Teacher  
Salary =  
\$57.290**

Note: Projected 1011 average teacher salary - \$57,290



**25 students**

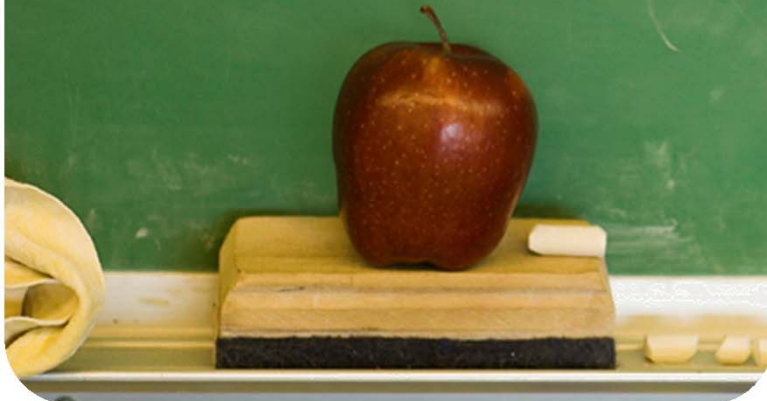


**Weight  
\$2,292 per  
student**

Once weights were established, RCSD ran scenarios to determine if sufficient funds were in the base pool to cover defined "Baseline services"

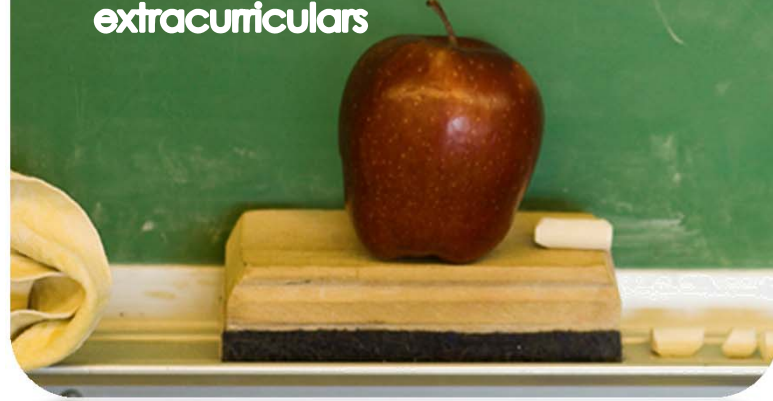
### ELEMENTARY SCHOOLS (EX)

- 22:1 GenEd class size
- 1.0 Principal
- 1.0 Secretary
- 0.5 Librarian
- 1.0 Special subjects teacher (Art/Music/PE)
- \$1,000/tchr for ST subs
- \$125/pp for supplies (inst. and custodial)



### SECONDARY SCHOOLS (EX)

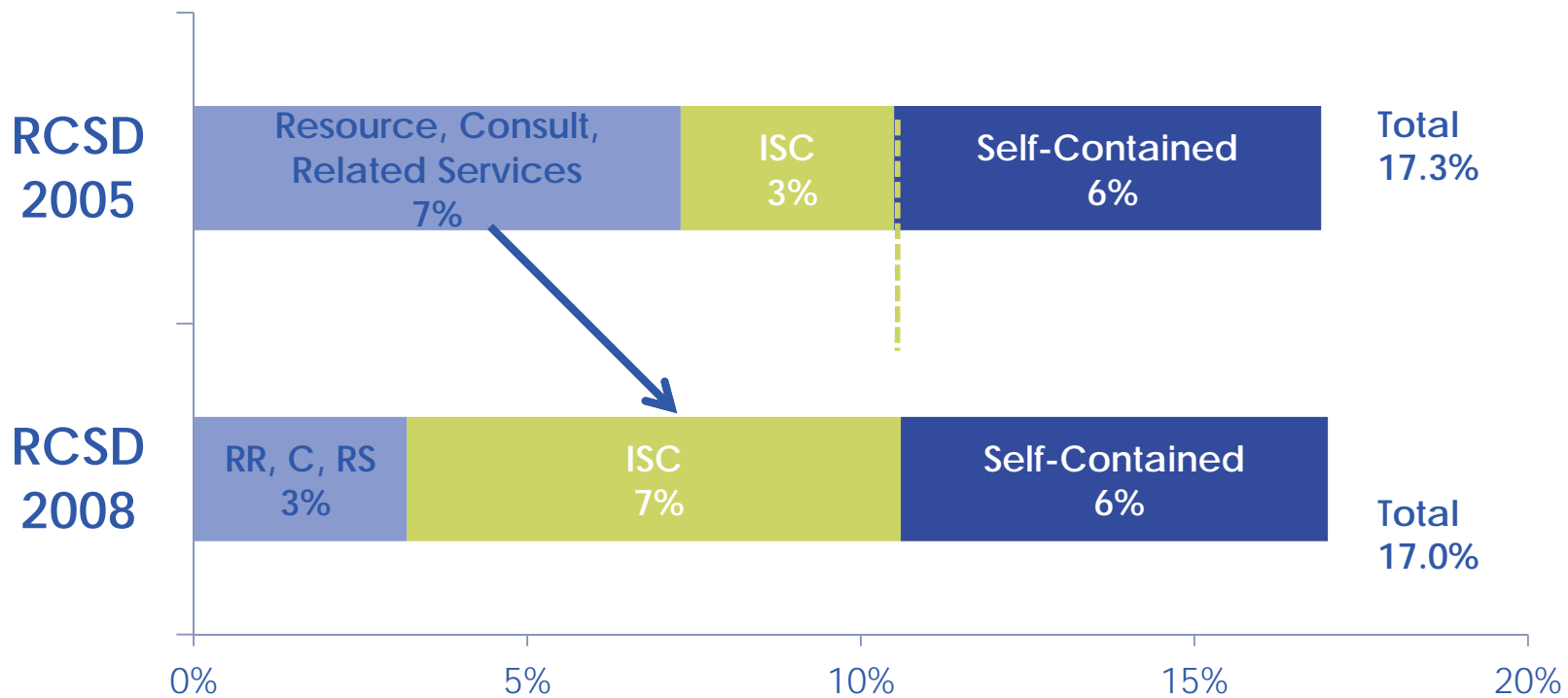
- 17:1 GenEd staffing ratio
- 1.0 Principal
- 1.0 Assistant principal
- 1.0 Secretary
- 0.5 Librarian
- 0.5 PE/Health/Athletic Cdr.
- 0.5 Counselor
- \$1,000/teacher for ST subs
- \$225/pp for supplies/athletics/extracurriculars



## In thinking about how much to weight the district should also consider the behaviors and models it wants to create or incentivize

Rochester is hoping to use its WSF to reverse the trend to more restrictive settings

### Change in SPED Placement: RCSD 2005 vs. RCSD 2008



Source: RCSD BEDS Enrollment  
EDUCATION RESOURCE STRATEGIES, INC.



## Other Considerations: Under SBB, what will happen to the schools with tiny populations of the ELL or Sped?

A

Can the school use fractional FTEs (0.1, 0.2, etc.)?  
*Implications for HR-Staffing? Union Contract?*

B

Can the school have full FTE but use additional SPED/ELL tchr. time to provide support (remedial, intervention, etc.)?  
*Implications for HR-Certifications? Union Contract?*

C

Will schools have to supplement using other funds?  
*Implications for Base Weight? Special Funds?*

D

Will district fund the difference for fractional FTEs?  
*Implications for budget? WSF as a whole?*

What are the implications for:

- Program Placement at Schools
- Student Placement into Programs
- Student Assignment to Schools



REMEMBER:

# Keep it simple!

- Complex formulas with many fragmented weights are difficult for stakeholders to digest in year 1
- The district can always create additional weights in future years



# Today's Objectives

Background, Strategic Alignment  
and Principal Engagement

Equitable Student Funding Details –  
Budget and Autonomy

Equity Work

Weights “Aligning cost with  
Services

**Strategic Support to Schools  
“Building Capacity and Success”**

Enterprise Planning Module (EPM) And  
ESF Management Tools “How Will  
Schools Develop Their Budgets”








## Define Risk Reserve: **TO BE FINALIZED in 2011**

Risk Area	% Reserve	Amount	Definition
Enrollment Risk	1.75%	\$3.4M	Takes into account refinement and adjustment in enrollment methodology
Transition Risk	2.0%	\$4.0M	Hold-harmless (33% g/l per year over 3 yrs)
Policy Risk	0.5%	\$1.0M	Unplanned Federal and state policy changes
Strategic Design Risk	2.0%	\$4.0M	Changes resulting from evolving District Portfolio Plan
Operational Risk	1.0%	\$2.0M	Unpredicted program requirements (legal, insurance, RTTT unfunded mandates)
Total	7.25%	\$14.4M	



# Determine what Characteristics to Weight: **COMPLETED**

<u>Category</u>	<u>Weight</u>	<u>No Weight</u>	<u>Comments</u>
Special Education			
English Language Learners			
Grade-Level			Do not weight due to limited ESF pool and desire to use ESF as opportunity to redesign HS/SS school structure
Performance			Do not weight due to concerns about perverse incentives, data integrity, and political implications
Poverty			Do not weight because schools will be receiving ~484/pp from Title I in 1011 – it will be important to communicate this



# Determine How much to Weight: **Formula Completed**

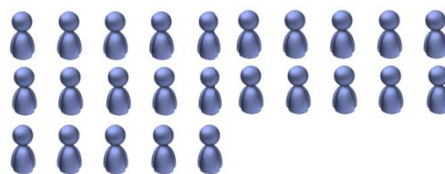
	\$	Weight	NYS ESOL Mandate: 1 unit=36 min	ESOL teacher -to-Unit Ratio	# of kids an ESOL teacher can see a day
Base Weight	\$3,866	1.00			
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<i>Advanced K-12</i>	\$1,151	0.30	1 unit/day		50 students



**Avg. Teacher  
Salary =  
\$57,529**



**25 students**



**Weight  
\$2,301 per  
student**

*Note: Actual 1011 average teacher salary - \$57,529*



# Determine How much to Weight: **Formula Completed**

	\$	Weight	Design	Fill Rate
Base Weight	\$3,866	1.00		
Special Education	-	-		
<i>Resource or Consultant</i>	\$5,753	1.49	<i>10 student-1 teacher</i>	50% fill rate of 20-1
<i>Integrated Special Class</i>	\$6,392	1.65	<i>9 students in a class of 24</i>	70% fill rate of 12 students
<i>Self-Contained 12:1</i>	\$6,056	1.57	<i>10 students-1 teacher - 1 aide</i>	80% fill rate of 12-1

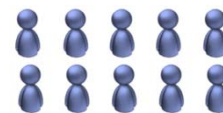


**Avg. Teacher Salary = \$57,529**

*Note: Actual 1011 average teacher salary - \$57,529*



**10 students**



**Weight**  
**\$5,753 per student**

**Weights can be adjusted if needed. If adjusted, we need to take into consideration program incentives**



# What are the Implications of a Transition Policy?

- A transition policy allows schools time to adjust to changes in budgets that result from the implementation of ESF – the move to greater Equity.
  - Schools that lose dollars may need time to make adjustments to school organizations.
  - Schools that gain dollars may need time to build capacity around high performing strategies so new dollars are used in effective ways.
  - The district may need time to adjust infrastructure, policies and procedures (such as HR) to accommodate the paradigm shift to school empowerment

**Transition Policy – Phase in over 3 years. Each year schools will experience 33% of their respective gain or loss.**



# HUNDREDS OF HOURS INVESTED OVER 2 YEARS

## Task Force For Implementation-More to Come

SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY
<p>9/7</p> <p><u>Review:</u></p> <ul style="list-style-type: none"> <li>1.1 - Lock/Unlock programs (Joyce)</li> <li>2.1 - Network support structure proposal (Chiefs)</li> </ul>	<p>10/4</p> <p><u>Review:</u></p> <ul style="list-style-type: none"> <li>1.1 - Policy decisions (Joyce)</li> <li>2.2 - Principal training schedule &amp; content (Chiefs)</li> <li>2.3 - Community/SBPT engagement (Chiefs)</li> <li>2.5 - School design templates (Chiefs)</li> </ul> <p><u>Final Review:</u></p> <ul style="list-style-type: none"> <li>2.1 - Network support structure (Chiefs)</li> </ul>	<p>10/29</p> <p><u>Review:</u></p> <ul style="list-style-type: none"> <li>1.3 &amp; 3.1 - <u>Budget Handbook &amp; Academic Guidelines</u> (Joyce &amp; Beth)</li> <li>3.2 - <u>Accountability &amp; Autonomy criteria DREAM vs. Strategic</u> (Beth)</li> <li>3.3 - <u>Build T&amp;L ESF Understanding</u></li> <li>3.4 - <u>SIP Process and timeline</u> (Beth)</li> </ul>	<p>11/29</p> <p><u>Final Review:</u></p> <ul style="list-style-type: none"> <li>1.1 - <u>Formula decisions -weights</u> (Joyce)</li> </ul>	<p>1/3</p> <p>Final Logistics</p> <div style="border: 2px dashed red; padding: 10px; margin-top: 20px;"> <p><b>Budgets delivered to schools by January 24, 2011</b></p> </div>
<p>9/20</p> <p><u>Review:</u></p> <ul style="list-style-type: none"> <li>1.1 - Policy decisions - avg. vs. actual (Joyce)</li> </ul> <p><u>Final Review:</u></p> <ul style="list-style-type: none"> <li>1.1 - Lock/Unlock programs (Joyce)</li> </ul>	<p>10/18</p> <p><u>Review:</u></p> <ul style="list-style-type: none"> <li>1.1 <b>Transition Policy</b></li> <li>4.1 - Enrollment projections (John)</li> <li>5.1 - Communication plan (Tom)</li> </ul> <p><u>Final Review:</u></p> <ul style="list-style-type: none"> <li>1.3 - Budget Process (Joyce)</li> <li>2.2 <b>Principal Training</b></li> </ul>	<p>11/15</p> <p><u>Review:</u></p> <ul style="list-style-type: none"> <li>1.1 - <u>Formula decisions -weights</u> (Joyce)</li> <li>1.4 - <u>Budget Tool and training</u> (Joyce)</li> </ul>	<p>12/13</p> <p><u>Final Review:</u></p> <ul style="list-style-type: none"> <li>1.3 - Budget handbook (Joyce)</li> <li>1.3 - Budget Guidelines (Joyce &amp; Beth)</li> <li>1.4 - Budget Tool and training (Joyce)</li> <li>5.1 - Communication documents for roll-out (Tom)</li> </ul>	<p>In the spring, the taskforce will address:</p> <ul style="list-style-type: none"> <li>4.2 - Student assignment</li> <li>4.3 HR Staffing Process</li> <li>4.4 - Schools Dashboard</li> <li>2.4 - Add'l autonomies</li> <li>2.5 - Alignment to strategic plan</li> </ul>



# Today's Objectives

Background, Strategic Alignment  
and Principal Engagement

Equitable Student Funding Details –  
Budget and Autonomy

Equity Work

Weights “Aligning cost with  
Services

Strategic Support to Schools  
“Building Capacity and Success”

Enterprise Planning Module (EPM) And  
ESF Management Tools “How Will  
Schools Develop Their Budgets”



# NEW BUDGETING TOOLS

EPM - Enterprise Planning Module  
ESF Management Tool  
January 6, 2011

1/27/2011



# ESF Funding Summary

What is the total pool of \$s being allocated to schools via WSF?

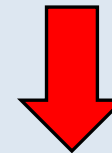
The total WSF Pool being allocated to schools ..... \$153,757,875

## 1. Summary Table

WSF-Eligible Funds			Special Funds
Total WSF-UNLOCKED \$s	\$197,759,325	68%	\$49,312,619
Total \$s: WSF-LOCKED	\$93,723,471	32%	
Total \$s	\$291,482,796		
<div>What reserves or adjustments do you want to make?</div>			
Reserves for WSF Implementation	\$14,337,551	7%	
Adjustment to reflect 2011 Revenue Cuts	\$29,663,899	15%	
Adjustment to reflect 2011 Increased Costs (Infl, Step Increase)	\$0	0%	
[Placeholder for other hold-backs]	\$0	0%	
[Placeholder for other hold-backs]	\$0	0%	

## Error Checker

Total School \$s (WSF-Eligible & Special)	\$ 340,795,415
Total Non-School \$s (General & Special)	\$ 40,139,068
Total Mgmt or nonK12 \$s	\$ 312,819,777
Grand Total	<b>\$ 693,754,260</b>
2010-11 District Budget	\$ 693,754,260
Difference	\$ -





# ESF Position Funding Summary

2. Determining the WSF Pool (LOCK vs. UNLOCK)			For reference, here are \$ paid by Special Funds	For reference only, here are the \$s for NON- SCHOOL costs (i.e., Central Functions)		District-wide Total
SCHOOL-Based Resources		WSF-Eligible Funds		Unlock?	General Funds	
POSITIONS/FTEs			The dollar amounts in Columns F-K are not eligible for WSF - they are shown here for your			
General Education Staff						
ES Homeroom Teachers	\$37,456,231	Unlock	\$2,880,028	\$0	\$56,592	\$40,392,851
SS Core Subject Teachers	\$32,517,129	Unlock	\$400	\$0	\$0	\$32,517,529
Art/Music Teachers	\$9,517,305	Unlock	\$0	\$0	\$0	\$9,517,305
Physical Education Teachers	\$6,747,143	Unlock	\$0	\$0	\$0	\$6,747,143
Other Special Subject Teachers (VocEd, Tech, etc.)	\$5,034,056	Unlock	\$0	\$0	\$0	\$5,034,056
General Education Paraprofessionals	\$2,227,592	Unlock	\$0	\$0	\$0	\$2,227,592
General Ed Teaching Assistants	\$82,678	Unlock	\$185,513	\$0	\$0	\$268,191
English Language Learners Teaching Staff						
ELL Teachers – ESOL	\$5,770,584	Unlock	\$135,698	\$0	\$98,378	\$6,004,660
ELL Teachers – LEAP	\$787,153	Unlock	\$0	\$0	\$0	\$787,153
ELL Teachers – Bilingual	\$5,747,850	Unlock	\$0	\$0	\$0	\$5,747,850
ELL Classroom Paraprofessionals	\$308,017	Unlock	\$0	\$0	\$0	\$308,017
Special Education Teaching Staff						
Special Ed Teachers - Resource	\$2,313,189	Unlock	\$93,260	\$0	\$0	\$2,406,449
Special Ed Teachers - Consultant	\$347,749	Unlock	\$0	\$0	\$0	\$347,749
Special Ed Teachers - ISC	\$14,490,963	Unlock	\$1,222,273	\$0	\$0	\$15,713,236
Special Ed Teachers - Self-Contained 12:1	\$8,480,580	Unlock	\$873,680	\$0	\$0	\$9,354,260
Special Ed Teachers - Self-Contained 8:1	\$3,950,403	Lock	\$263,044	\$0	\$0	\$4,213,447
Special Ed Teachers - Self-Contained 6:1	\$145,606	Lock	\$0	\$0	\$0	\$145,606
Special Ed Teachers (MIXED across programs)	\$2,132,824	Unlock	\$54,999	\$26,847	\$0	\$2,214,670
Special Ed Classroom Paraprofessionals	\$2,936,731	Unlock	\$552,432	\$0	\$0	\$3,489,163





# ESF Program Funding Summary

2. Determining the WSF Pool (LOCK vs. UNLOCK)			For reference, here are \$ paid by Special Funds	For reference only, here are the \$s for NON- SCHOOL costs (i.e., Central Functions)		District-wide Total
SCHOOL-Based Resources		WSF-Eligible Funds		Unlock?	General Funds	
PROGRAMS (Includes all the Positions, Supplies, Materials, etc., associated with the program)						
Academic Programs						
Academic Intervention/Response to Intervention	\$0	Unlock	\$7,679,622	\$0	\$349,513	\$8,029,135
Alternative School NorthSTAR	\$1,955,346	Lock	\$0	\$0	\$0	\$1,955,346
Alternative School Programs \$s	\$0	Lock	\$211,897	\$0	\$0	\$211,897
ArtPeace @ School Without Walls	\$60,000	Unlock	\$0	\$0	\$0	\$60,000
ATS: East High Center for Youth ATS	\$0	Lock	\$0	\$0	\$0	\$0
ATS: Edison Center for Youth Services	\$0	Lock	\$0	\$0	\$0	\$0
ATS: On-Campus Intervention Program	\$0	Lock	\$1,634,937	\$0	\$0	\$1,634,937
Autism Spectrum Disorder Team	\$0	Lock	\$71,002	\$0	\$89,523	\$160,525
AVID	\$1,026,842	Unlock	\$0	\$225,893	\$0	\$1,252,735
Bryant & Stratton Middle College	\$0	Unlock	\$0	\$0	\$99,250	\$99,250
Bry's Mentoring Program	\$0	Unlock	\$0	\$0	\$15,000	\$15,000
Career & Technical Ed - Virtual Enterprise	\$0	Unlock	\$22,571	\$0	\$0	\$22,571
Career and Technical Education	\$162,492	Lock	\$450,262	\$0	\$0	\$612,754
Careers in Teaching	\$0	Lock	\$658,483	\$0	\$1,294,624	\$1,953,107
Charlotte HS Urban League	\$116,884	Unlock	\$0	\$0	\$0	\$116,884
Chinese Language Program	\$0	Lock	\$0	\$4,500	\$0	\$4,500
College Board at Vanguard	\$0	Lock	\$0	\$0	\$0	\$0
Commencement Summer School	\$2,185,127	Lock	\$0	\$0	\$0	\$2,185,127
Diversity Initiative - Recruiting	\$0	Lock	\$0	\$1,020	\$266,820	\$267,840
Dream Schools Program	\$0	Lock	\$555,444	\$0	\$298,321	\$853,765
Drug & Alcohol Counselors (Delphi)	\$0	Lock	\$0	\$0	\$238,652	\$238,652
Early Language & Literacy (Great Beginnings)	\$837,867	Unlock	\$0	\$0	\$0	\$837,867
East High - Learning Institute	\$18,675	Lock	\$0	\$0	\$0	\$18,675
East High Small Learning Community Intermediary	\$0	Lock	\$0	\$0	\$0	\$0





# ESF Resource Funding Summary

2. Determining the WSF Pool (LOCK vs. UNLOCK) SCHOOL-Based Resources				For reference only, here are the \$s for NON-SCHOOL costs (i.e., Central Functions)		District-wide Total
	WSF-Eligible Funds	Unlock?	For reference, here are \$ paid by Special Funds	General Funds	Special Funds	
<b>RESOURCES (Supplies, Materials, and other Non-FTEs)</b>						
<b>Staff Overtime or Substitutes</b>						
Short-term Substitutes (Teacher)	\$9,321,360	Unlock	\$0	\$0	\$0	\$9,321,360
Substitutes (Building Teachers)	\$976,163	Lock	\$0	\$0	\$0	\$976,163
Substitutes (Food Service)	\$0	Lock	\$171,000	\$0	\$0	\$171,000
Substitutes (Other Staff Positions)	\$113,705	Lock	\$0	\$0	\$0	\$113,705
Substitutes (Paras)	\$1,588,000	Unlock	\$0	\$0	\$0	\$1,588,000
Other Pay/Stipends	\$758,440	Lock	\$2,566	\$0	\$0	\$761,006
<b>Instructional Supplies and Services</b>						
Computer Hardware	\$138,685	Unlock	\$0	\$0	\$0	\$138,685
Computer Software/Inst. Technology	\$14,751	Unlock	\$0	\$0	\$0	\$14,751
Instructional Supplies	\$1,735,315	Unlock	\$111,097	\$0	\$0	\$1,846,412
Equipment	\$135,171	Unlock	\$20,707	\$0	\$0	\$155,878
Field Trips - Transportation	\$101,870	Unlock	\$0	\$0	\$0	\$101,870
Library Books	\$197,560	Unlock	\$0	\$5,500	\$1,000	\$204,060
Textbooks	\$1,810,207	Unlock	\$0	\$0	\$0	\$1,810,207
Student Stipends	\$250	Unlock	\$0	\$0	\$0	\$250
<b>Operational Supplies and Services</b>						
Office/Admin Services and Supplies	\$398,477	Unlock	\$0	\$0	\$0	\$398,477
Community Use	\$0	Unlock	\$94,740	\$0	\$0	\$94,740
Consultants	\$39,375	Unlock	\$113,477	\$319,525	\$376,174	\$848,551
Custodial Services	\$0	Lock	\$0	\$0	\$0	\$0
Custodial Supplies	\$444,406	Unlock	\$0	\$0	\$0	\$444,406
Food and Snacks	\$10,600	Unlock	\$10,000	\$0	\$0	\$20,600
Maintenance Services and Supplies	\$173,175	Lock	\$0	\$0	\$0	\$173,175
Security Management	\$0	Lock	\$0	\$2,522,983	\$40,000	\$2,562,983





# Non K12 School Cost

2. Determining the WSF Pool (LOCK vs. UNLOCK)				For reference, here are \$ paid by Special Funds	For reference only, here are the \$s for NON-SCHOOL costs (i.e., Central Functions)		District-wide Total
SCHOOL-Based Resources		WSF-Eligible Funds	Unlock?		General Funds	Special Funds	
Excluded Non-District or non-K-12 Costs:							
Adult and Continuing Education (OACES)						\$4,922,120	
Agency Youth Program						\$1,232,301	
Charter Schools						\$18,584,853	
Food Services Services and Supplies						\$9,199,160	
Gateway to College MCC						\$484,900	
Home Hospital Program						\$0	
Incarcerated Youth Program						\$2,004,276	
PreK						\$10,413,621	
Private/Parochial						\$1,273,634	
Tuition - Special Education						\$25,325,917	
Youth and Justice						\$145,151	
Excluded District Management Costs:							
ADA Section 504 rehab						\$38,984	
Benefits						\$140,392,079	
Benefits (Food Service)						\$2,411,376	
Debt						\$34,920,696	
Grant Disallowances						\$1,270,000	
Districtwide Management Expense						-\$3,686,045	
Indirect Grant Costs						\$3,260,895	
MANAGEMENT COSTS NON-SCHOOL-BASED						\$42,371,263	
Relocation/moving budget						\$383,800	
School Reserves						\$2,065,552	
System Leadership Costs						\$10,348,617	
Union Contractual Obligations						\$5,456,627	





# District Demographic

What are the characteristics of the students in my district?

The total number of K-12 students .... 31,247

	K-12 Total	K	1	2	3	4	5	6	7	8	9	10	11	12
Total Enrollment (2010-11 BEDS)	31,247	2,459	2,626	2,557	2,444	2,510	2,291	2,360	2,262	2,282	3,307	2,423	1,765	1,961
% of Total Enrollment	100%	8%	8%	8%	8%	8%	7%	8%	7%	7%	11%	8%	6%	6%

General Ed Enrollment (1011 BEDS)	25,885	2,184	2,251	2,146	2,065	2,069	1,887	1,868	1,814	1,839	2,610	2,052	1,551	1,549
% of Projected Total Enroll (by grade)	83%	89%	86%	84%	84%	82%	82%	79%	80%	81%	79%	85%	88%	79%

Poverty Enrollment (1011 BEDS)	25,000	2,055	2,229	2,183	2,054	2,149	1,949	2,038	1,912	1,885	2,460	1,682	1,180	1,224
% of Projected Total Enroll (by grade)	80%	84%	85%	85%	84%	86%	85%	86%	85%	83%	74%	69%	67%	62%

ELL Enrollment (1011 BEDS)	2,765	237	324	327	300	305	200	176	136	157	222	170	106	105
% of Projected Total Enroll (by grade)	9%	10%	12%	13%	12%	12%	9%	7%	6%	7%	7%	7%	6%	5%

(1011 BEDS)

ELL - Freestanding ESOL	1,086	74	127	114	110	130	70	48	71	64	111	61	47	59
ELL - LEAP	594	52	59	63	62	48	39	46	23	43	33	71	38	17
ELL - Bilingual	905	77	106	113	101	100	78	72	42	50	78	38	21	29
ELL - Dual Language	180	34	32	37	27	27	13	10	0	0	0	0	0	0

(0910 NYSESLEAT Scores applied to 1011 BEDS) - Note that these total to 2988 (11 more than BEDS - this is due to rounding to get whole numbers when applying %s)

ELL - Beginner	1,201	108	147	144	127	129	85	85	53	64	107	69	39	45
ELL - Intermediate	952	71	99	101	95	96	63	52	58	61	86	78	50	44
ELL - Advanced	617	60	81	82	79	80	52	39	27	31	29	25	17	17

SPED Enrollment (1011 BEDS)	5,362	259	367	405	388	460	388	511	435	443	710	372	234	390
% of Projected Total Enroll (by grade)	17%	11%	14%	16%	16%	18%	17%	22%	19%	19%	21%	15%	13%	20%
SPED - Consultant Teacher	82	0	0	0	0	0	0	0	2	1	14	16	17	32
SPED - Resource Room Support	531	3	15	22	37	53	41	69	67	58	76	46	23	21
SPED - Integrated Special Class	2,424	101	125	188	189	229	200	208	222	236	340	179	102	105
SPED - Special Class 12:1	1,319	20	53	65	74	106	102	143	100	106	200	104	86	160
SPED - Special Class 8:1	436	11	21	25	36	34	27	64	38	32	63	20	5	60



# Student Weight

## Summary of the Weights-at-a-Glance

The following tables are for summary purposes only. Please do NOT enter any values into these tables.

Base Weight	
PreK Increment	\$0
K-12 Base Weight	\$3,866

Foundation Amounts	ES	MS	SS	HS
For schools w/ enrollment below:	-	-	-	-
The foundation amount is:	\$0	\$0	\$0	\$0

### Weights At-A-Glance (Dollar Amounts)

	K	1	2	3	4	5	6	7	8	9	10	11	12
Grade	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
SPED - Consultant Teacher	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753
SPED - Resource Room Support	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753	\$5,753
SPED - Integrated Special Class	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392	\$6,392
SPED - Special Class 12:1	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056	\$6,056
SPED - Special Class 8:1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
SPED - Special Class 6:1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
SPED - Home Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
SPED - Related Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
ELL - Beginning	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$3,451	\$3,451	\$3,451	\$3,451
ELL - Intermediate	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301	\$2,301
ELL - Advanced	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151	\$1,151
ELL - Freestanding ESOL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
ELL - LEAP	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
ELL - Bilingual	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0



# Approved Budget Line Item

Budget Code	Account Descr	Org Descr	Program Descr	Subclass Descr	Dollar Amt	FTE Amt	RCSD GROUP: Categories	RCSD Group: WSF Eligible Funds vs. Special Funds	RCSD Group: Schools vs. NonSchool
5149E7201621100200	Tool Allowance	Trnsprtn-Vhcl Mainte	Garage Building	General Fund - No	3,600.00		Transportation Services and Supplies	WSF-Eligible Funds	Non-School
5430E7201620200200	Anti-Freeze	Trnsprtn-Vhcl Mainte	Garage Building	General Fund - No	2,500.00		Transportation Services and Supplies	WSF-Eligible Funds	Non-School
5126E7311621120200	Office Supplies	All Schools Unassign	Operation Of Plant	General Fund - No	113.00		Management Costs non-school-base	WSF-Eligible Funds	Non-School
5149E7521620700200	Tchr Sal Inservice/Curr	Office of Mathematics	Inservice Training - Provide	General Fund - No	4,500.00		Management Costs non-school-base	WSF-Eligible Funds	Non-School
5520E7521620700200	Tchr Sal Hourly 7-12	Office of Social Studie	Curriculum Devel & Superv	TEACHING AS H	3,000.00		Management Costs non-school-base	Special Funds	Non-School
5148E7771621100200	Office Supplies	South Zone School S	Supervision-Regular Schoo	General Fund - No	2,000.00		Management Costs non-school-base	WSF-Eligible Funds	Non-School
5149E7771621100200	Instructional Supplies	Office of Foreign Lan	Teaching - Regular School	General Fund - No	4,500.00		Chinese Language Program	WSF-Eligible Funds	Non-School
5152E7771620700200	Computer Hardware	African & African-Am	Curriculum Devel & Superv	General Fund - No	1,000.00		Management Costs non-school-base	WSF-Eligible Funds	Non-School
5163E7771620200200	Printing & Advertising	African & African-Am	Curriculum Devel & Superv	General Fund - No	2,000.00		Management Costs non-school-base	WSF-Eligible Funds	Non-School
5421E7771620700200	Instructional Supplies	African & African-Am	Teaching - Regular School	General Fund - No	4,000.00		Management Costs non-school-base	WSF-Eligible Funds	Non-School
5425E7771620700200	Prof Books & Publications	African & African-Am	Inservice Training - Provide	General Fund - No	7,340.00		Management Costs non-school-base	WSF-Eligible Funds	Non-School
5820E9012090600202	Social Security	Employment Benefits	Social Security	School Health Ser	9,326.00		Benefits	Special Funds	Non-School
5500E1710721100215	Tchr Sal 7-12	Jefferson High Scho	Teaching - Regular School	General Fund - No	39,948.00	0.90	Other Special Subject Teachers (Voc	WSF-Eligible Funds	School
5816E9012090450199	State Teachers Retirement	Employment Benefits	Teachers Retirement	Summer Program	58,357.00		Benefits	Special Funds	Non-School
5822E9012090500199	Workers Compensation Ins	Employment Benefits	Workers Compensation	Summer Program	17,669.00		Benefits	Special Funds	Non-School
5433E2850720700200	Tchr Sal 1-6	#54 - Flower City Sch	Teaching - Regular School	General Fund - No	94,217.00	1.00	ES Homeroom Teachers	WSF-Eligible Funds	School
5500E3520721100200	C.S. Overtime	# 6 - Dag Hammarskj	Pre-Kindergarten Program	Universal Pre-K	1,280.00		PREK	Special Funds	School
5430E7101620700200	Serv Conts & Equip Repair	Mail Room - CS	Central Printing & Mailing	General Fund - No	43,396.00		Management Costs non-school-base	WSF-Eligible Funds	Non-School
5461A1070221100000	C.S. Sal Supv & Tech	Office - Food Service	Food Service Office	General Fund - No	89,327.00	1.00	Food Services Services and Supplies	Special Funds	Non-School
5163A1010220200000	Tchr Sal Adm & Supv	Northwest College P	Supervision-Regular Schoo	General Fund - No	54,627.00	0.50	Coordinator for PE/Health/Athletics	WSF-Eligible Funds	School
5468A1010221100000	Tchr Sal Adm & Supv	BioScience Health F	Supervision-Regular Schoo	C4E - Dream Sch	44,386.00	1.00	Dream Schools Program	Special Funds	School
5511A1010220200000	Tchr Sal Adm & Supv	High Schools - HS	Supervision-Regular Schoo	General Fund - No	44,386.00	1.00	school reserves	WSF-Eligible Funds	School
5182A1020221100000	Tchr Sal Adm & Supv	Edison-Img & Info Te	Supervision-Regular Schoo	General Fund - No	71,874.00	0.75	Assistant Principals	WSF-Eligible Funds	School
5462A1020221100000	Tchr Sal Adm & Supv	Edison-Img & Info Te	Supervision-Regular Schoo	Title I Stimulus Dre	23,959.00	0.25	Assistant Principals	Special Funds	School
5500A1020221100000	Tchr Sal Adm & Supv	Edison-Img & Info Te	Supervision-Regular Schoo	Title I Stimulus Dre	(23,959.00)	(0.25)	Assistant Principals	Special Funds	School
5220A1030220100000	Tchr Sal Adm & Supv	Research & Program	Research Planning & Evalu	General Fund - No	(34,339.00)	(0.25)	System Leadership Costs	WSF-Eligible Funds	Non-School
5462A1030221100000	Tchr Sal Adm & Supv	OACES-WFP	Occupational Education	General Fund - No	72,137.00	1.00	Adult and Continuing Education (OAC	WSF-Eligible Funds	School



# ESF Position Funding Summary

2. Determining the WSF Pool (LOCK vs. UNLOCK)			For reference, here are \$ paid by Special Funds	For reference only, here are the \$s for NON- SCHOOL costs (i.e., Central Functions)		District-wide Total
SCHOOL-Based Resources				General Funds	Special Funds	
	WSF-Eligible Funds	Unlock?				
POSITIONS/FTEs			The dollar amounts in Columns F-K are not eligible for WSF - they are shown here for your			
General Education Staff						
ES Homeroom Teachers	\$37,456,231	Unlock	\$2,880,028	\$0	\$56,592	\$40,392,851
SS Core Subject Teachers	\$32,517,129	Unlock	\$400	\$0	\$0	\$32,517,529
Art/Music Teachers	\$9,517,305	Unlock	\$0	\$0	\$0	\$9,517,305
Physical Education Teachers	\$6,747,143	Unlock	\$0	\$0	\$0	\$6,747,143
Other Special Subject Teachers (VocEd, Tech, etc.)	\$5,034,056	Unlock	\$0	\$0	\$0	\$5,034,056
General Education Paraprofessionals	\$2,227,592	Unlock	\$0	\$0	\$0	\$2,227,592
General Ed Teaching Assistants	\$82,678	Unlock	\$185,513	\$0	\$0	\$268,191
English Language Learners Teaching Staff						
ELL Teachers – ESOL	\$5,770,584	Unlock	\$135,698	\$0	\$98,378	\$6,004,660
ELL Teachers – LEAP	\$787,153	Unlock	\$0	\$0	\$0	\$787,153
ELL Teachers – Bilingual	\$5,747,850	Unlock	\$0	\$0	\$0	\$5,747,850
ELL Classroom Paraprofessionals	\$308,017	Unlock	\$0	\$0	\$0	\$308,017
Special Education Teaching Staff						
Special Ed Teachers - Resource	\$2,313,189	Unlock	\$93,260	\$0	\$0	\$2,406,449
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Special Ed Teachers - Self-Contained 12:1	\$8,480,580	Unlock	\$873,680	\$0	\$0	\$9,354,260
Special Ed Teachers - Self-Contained 8:1	\$3,950,403	Lock	\$263,044	\$0	\$0	\$4,213,447
Special Ed Teachers - Self-Contained 6:1	\$145,606	Lock	\$0	\$0	\$0	\$145,606
Special Ed Teachers (MIXED across programs)	\$2,132,824	Unlock	\$54,999	\$26,847	\$0	\$2,214,670
Special Ed Classroom Paraprofessionals	\$2,936,731	Unlock	\$552,432	\$0	\$0	\$3,489,163



# Enrollment Data

RCS D Enrollment				Total Enrollment (All Students)				General Ed Enrollment			SPED TOTAL	Integrated Special Class			ELL TOTAL	ELL		ELL	FRL Students		Gifted and Talented Students		2010-11 ELL Proficiency - Beginning			
Org Code (budget file)	School name	School Level	K-12	PreK	K	1	K-12	PreK	K	K		K	1	2		Total ELL			K-12 All St	K-12	% FRL	K-12	PreK	ELL Total	K-12	% Beginning
																% ELL	PreK									
10102	#1 - Martin B Anderson	ES	295	32	42	41	267	31	40	28				10	3%	0	295	250	85%	0	10	1	13%			
10202	#2 - Clara Barton - ES	ES	346	34	45	46	246	34	41	100			6	2	1%	0	346	299	86%	0	2	1	50%			
10302	# 3 - Nathaniel Rochester - ES	ES	461		64	66	386		57	75	7	7	10	10	2%	0	461	393	85%	0	13	3	0%			
10304	# 3 - Nathaniel Rochester - MS	MS	204				158		0	46				6	3%	0	204	165	81%	0	6	0	0%			
10402	# 4 - George M Forbes - ES	ES	365		48	56	255		44	110				9	2%	0	365	323	88%	0	9	8	88%			
10502	# 5 - John Williams - ES	ES	518	27	64	63	432	26	61	86				147	28%	0	518	481	93%	0	147	62	42%			
10602	# 6 - Dag Hammarskjold - ES	ES	327	44	56	69	281	41	47	46				32	10%	0	327	327	100%	0	32	9	28%			
10702	#7 - Virgil I. Grissom - ES	ES	563	33	84	94	474	33	67	89	8		10	15	3%	0	563	459	82%	0	15	8	56%			
10802	#8 - Roberto Clemente - ES	ES	517	47	87	85	475	40	83	42				25	5%	0	517	438	85%	0	25	13	52%			
10902	#9 - Martin Luther King - ES	ES	709	18	104	119	622	17	98	87				252	36%	0	709	684	96%	0	254	128	51%			
11002	#10 - Dr. Walter Cooper Acad	ES	174		45	48	132		33	42		4	9	22	13%	0	174	155	89%	0	22	17	79%			
11202	#12 - James P B Duffy - ES	ES	785		107	103	682		102	103		8	9	115	15%	0	785	624	79%	0	115	50	44%			
11402	#14 - Chester Dewey - ES	ES	132				109		0	23				42	32%	0	132	125	95%	0	42	3	8%			
11502	#15 - Children's School - ES	ES	302		38	41	281		37	21			7	137	45%	0	302	245	81%	0	137	83	61%			
11602	#16 - John W Spencer - ES	ES	414	34	68	64	350	34	63	64				3	1%	0	414	355	86%	0	3	2	80%			
11702	#17 - Enrico Fermi - ES	ES	523	46	80	90	457	45	70	66				115	22%	0	523	465	89%	0	115	59	51%			
11902	#19 - Dr Chas Lunsford - ES	ES	383	34	51	45	316	20	42	67	5	8	5	5	1%	0	383	333	87%	0	5	3	50%			
12002	#20 - Henry Lomb - ES	ES	341	21	48	66	294	20	42	47		5		26	8%	0	341	294	86%	0	26	8	32%			
12202	#22 - Abraham Lincoln - ES	ES	445	33	53	78	352	32	43	93	8	7	13	143	32%	0	445	391	88%	0	143	65	46%			
12302	#23 - Francis Parker - ES	ES	312	35	44	42	276	34	35	36	7		10	4	1%	0	312	199	64%	0	4	3	67%			



# ESF Funding Summary

What is the total pool of \$s being allocated to schools via WSF?

The total WSF Pool being allocated to schools ..... \$153,757,875

## 1. Summary Table

WSF-Eligible Funds			Special Funds
Total WSF-UNLOCKED \$s	\$197,759,325	68%	\$49,312,619
Total \$s: WSF-LOCKED	\$93,723,471	32%	
Total \$s	\$291,482,796		
What reserves or adjustments do you want to make?			
Reserves for WSF Implementation	\$14,337,551	7%	
Adjustment to reflect 2011 Revenue Cuts	\$29,663,899	15%	
Adjustment to reflect 2011 Increased Costs (Infl, Step Increase)	\$0	0%	
[Placeholder for other hold-backs]	\$0	0%	
[Placeholder for other hold-backs]	\$0	0%	

## Error Checker

Total School \$s (WSF-Eligible & Special)	\$	340,795,415
Total Non-School \$s (General & Special)	\$	40,139,068
Total Mgmt or nonK12 \$s	\$	312,819,777
Grand Total	\$	<b>693,754,260</b>
2010-11 District Budget	\$	693,754,260
Difference	\$	-



# How the tools support ESF

- Planning and preparation is completed in PeopleSoft
- Allows for position budgeting as well as operational expenses
- Targets for each area are preloaded
- Same tool is used for schools and departments
- Capacity for capturing notes to planning
- Adds efficiencies to the roll up of District-wide budget
- Management Tool allows for scenario development, ESF funding, calculation of Special Ed and ELL weights, separation of funding and tracking of decisions



# Select Budget Activity

My Planning Workspace

ORACLE® Home

Favorites Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

Use Saved Search:

Role Name: begins with

Business Unit: begins with

Planning Model ID: begins with

Activity: begins with

Scenario: begins with

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#) [Delete Saved Search](#)

### Search Results

View All First 1-3 of 3 Last

Role Name	Business Unit	Planning Model ID	Activity	Scenario
<a href="#">Preparer</a>	<a href="#">RCSD1</a>	<a href="#">TEST_PROTO</a>	<a href="#">DEPARTMENT</a>	<a href="#">2012_BUDG</a>
<a href="#">Preparer</a>	<a href="#">RCSD1</a>	<a href="#">TEST_PROTO</a>	<a href="#">POSITION</a>	<a href="#">2012_BUDG</a>
<a href="#">Preparer</a>	<a href="#">RCSD1</a>	<a href="#">TEST_PROTO</a>	<a href="#">TITLE1</a>	<a href="#">2012_BUDG</a>





# Access Position Budgeting

## My Planning Workspace

Role Name: Preparer

Business Unit: RCSD1

Planning Model ID: TEST\_PROTO test Budget Proof of Concept

Activity: Position

Scenario: 2012 Budget

Refresh

[Workspace Search](#)

[User Preferences](#)

[Email](#)

[Budget Grand Totals](#)

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Submit

Version: All

Status: All

Refresh

### My Planning Workspace

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-3 of 3](#) | [Last](#)

Workspace Details

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Notes
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	

Submit

☒ [Select All](#)

☐ [Clear All](#)



# Position Overview

[New Window](#) [Customize Page](#)

## Position Overview

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

▶ Planning Center

[Budget Grand Totals](#)

### Action Menu

Position:   Adjust:    
By:   [Position Budgeting Analysis](#)  
View HR Defaults:

### Search and Filter Options

\*Show:   
\*Include:   
☐ Show Excluded Positions  
  
Job Code:   
Position Number:   
Employee ID:   
Name:   
Union Code:

Positions 1 to 30 of 37

### Positions and Employees

[Customize](#)

	Description	Position Number	Empl ID	ER Vacancy	Job Code	Union Code	Budget Calc	Budget Impact	Currency Code
	<a href="#">CLEANER-13602</a>	00000198		No	C321	010	Include	5,293.60	USD
	<a href="#">PARA SPEC ED-13602</a>	00000343		No	C707	022	Include	171,444.00	USD
	<a href="#">TCHR-ELEM 2nd-13602</a>	00000360		No	T812	003	Include	219,509.00	USD
	<a href="#">LIBRARY MEDIA SPECIALIST-13602</a>	00000408		No	T390	003	Include	65,688.00	USD



# Access Position Budgeting

## My Planning Workspace

Role Name: Preparer  
Business Unit: RCSD1  
Planning Model ID: TEST\_PROTO test Budget Proof of Concept  
Activity:   
Scenario:

[Workspace Search](#)

[User Preferences](#)

[Email](#)

[Budget Grand Totals](#)



To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Version:

Status:

### My Planning Workspace

[Customize](#) | [Find](#) | [View All](#) | | [First](#) | **1-3 of 3** | [Last](#)

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Notes
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	

☒ [Select All](#)

☐ [Clear All](#)



# Check Budget Totals

My Planning Workspace

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign Out

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

## Budget Grand Totals

**Business Unit:** RCSD1 Rochester City School District  
**Planning Model ID:** TEST\_PROTO test Budget Proof of Concept  
**Activity:** POSITION Position  
**Scenario:** 2012\_BUDG 2010-2011 Department Budget  
**Planning Center:** 13602  
**Version:** Version 1 Version 1

Department: 13602

Planning Target Details				
Related Activity	Planning Target	Budget Total	Amount Difference	% Variance
AFSC		0.0000	0.000	
POSBUD		0.0000	0.000	
->TOTAL		0.0000	0.000	
DEPARTMENT	3,049,817.0000	44,000.0000	0.000	
POSBUD		2,478,202.2000	0.000	
->TOTAL	3,049,817.0000	2,522,202.2000	-527,614.800	7.30
GRANT		0.0000	0.000	
POSBUD		0.0000	0.000	
->TOTAL		0.0000	0.000	
TITLE1	97,549.0000	37,114.0000	0.000	
POSBUD		60,435.0000	0.000	
->TOTAL	97,549.0000	97,549.0000	0.000	



# Access Operating Budget

## My Planning Workspace

Role Name: Preparer

Business Unit: RCSD1

Planning Model ID: TEST\_PROTO test Budget Proof of Concept

Activity: Dept Oper Expe

Scenario: 2012 Budget

Refresh

[Workspace Search](#)

[User Preferences](#)

[Email](#)

[Budget Grand Totals](#)

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Submit

Version: All

Status: All

Refresh

### My Planning Workspace

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-3 of 3](#) | [Last](#)

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Notes
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	
<input type="checkbox"/>	13602	#36 - Henry W Longfellow - ES	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	



# Enter Operating Budgets

ORACLE®

Home | Worklist

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

	Account▲	Description	Fund Code	Department▲	Program Code	Class Field	Amount Type	Amount		BY 2012
✓	5462	Postage	A	13602	2110	0000	Method	0.00		0.00
✓	5462	Postage	A	13602	2110	0000	Adjustment	0.00		0.00
✓	5462	Postage	A	13602	2110	0000	Total	0.00		0.00
✓	5485	Agency Clerical	A	13602	2020	0000	Method	0.00		0.00
✓	5485	Agency Clerical	A	13602	2020	0000	Adjustment	0.00		0.00
✓	5485	Agency Clerical	A	13602	2020	0000	Total	0.00		0.00
✓	5500	Instructional Supplies	A	13602	2110	0000	Method	0.00		0.00
✓	5500	Instructional Supplies	A	13602	2110	0000	Adjustment	0.00		0.00
✓	5500	Instructional Supplies	A	13602	2110	0000	Total	0.00		0.00
✓	5500	Instructional Supplies	A	13602	2110	4515	Method	0.00		0.00
✓	5500	Instructional Supplies	A	13602	2110	4515	Adjustment	0.00		0.00
✓	5500	Instructional Supplies	A	13602	2110	4515	Total	0.00		0.00
✓	5511	Office Supplies	A	13602	2020	0000	Method	0.00		0.00
✓	5511	Office Supplies	A	13602	2020	0000	Adjustment	0.00		0.00
✓	5511	Office Supplies	A	13602	2020	0000	Total	0.00		0.00



# Check Planning Targets

## Planning Targets

**Business Unit:** RCSD1 Rochester City School District  
**Planning Model ID:** TEST\_PROTO test Budget Proof of Concept  
**Activity:** DEPARTMENT Department Operating Expense  
**Scenario:** 2012\_BUDG 2010-2011 Department Budget  
**Planning Center:** 13602 #36 - Henry W Longfellow - ES  
**Version:** Version 1 Version 1

### Tolerance Rules

**Control Level:** Active **Currency Code:** USD

### Details

[Customize](#) |

From Account	To Account		Target Tolerance %		Target Tolerance Amount
5000	5915	Above Target		And	0.00

### Status Summary

**Target Status:** Valid **Submit Allowed:** Yes

### Planning Target Details

[Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-2 of 2 | [Last](#)

	Budget Center	Account	Fund Code	Planning Target	Budget Total	Amount Difference	% Variance
✓	. . . 13602 - #36 - Henry W Longfellow - ES			3,049,817.00	2,522,202.20	-527,614.80	-17.30
✓	. . . 13602 - #36 - Henry W Longfellow - ES	XX		3,049,817.00	2,522,202.20	-527,614.80	-17.30



# The End...It's all clear to me now !?@\*

## Communication

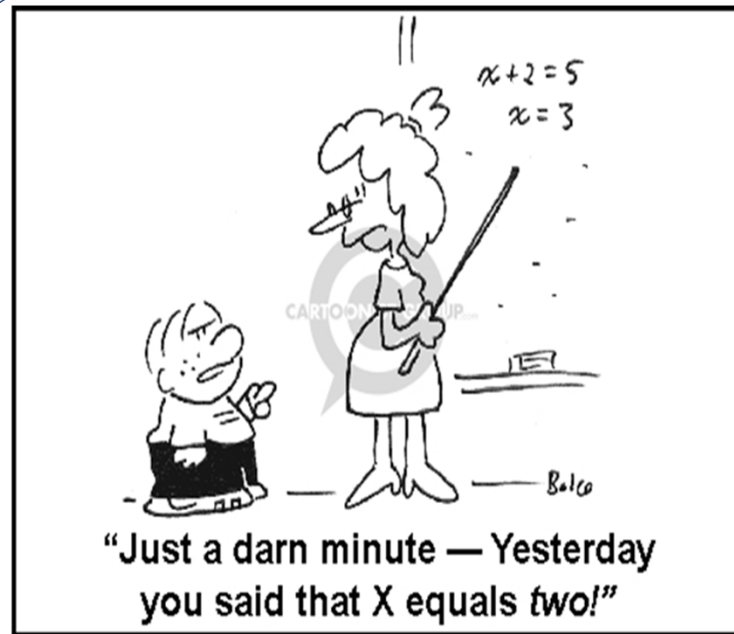
- Sending a clear and consistent message is critical
- Adopt a shared common language-district wide
- Clarify goals and objectives, define the strategy

Autonomous

School Empowerment

ESF

Transparency



Equitable Student Funding

ACS

Fair Student Funding

Equity