overview

1. Student-Based Allocation
2. Internal Engagement
3. Approved SBA Items
4. Projected Weight Calculation
5. Example of School Allotment
6. Transition Policy Update
7. Move Towards Equity
student-based allocation

- Determine the most fair and equitable distribution of funds across the district
- Weighted student formula created & explained to school leaders

Equity
- Distribute resources based on student need

Transparency
- Use clear and easily understood rules for where, how and why dollars flow

Flexibility
- Empower principals to make smart decisions based on unique student needs

Student Based Allocation enables school leadership to be more strategic with resources.
Arlington Woods School 99

School leadership & teaching staff agreed to accept class size increases to invest in:

**Social & Emotional Learning**
- Added social & emotional learning as “related arts” class
- Created new position & job description
- Purchase Behavior Specialist role to support students directly

**Instructional Planning & Coaching**
- Designed new schedule to create 100 minutes of common planning each week (previously only 30 minutes every other week)
- Identified math instruction as academic priority
- Hired a full-time coach to support teachers & lead professional development
internal engagement

**Autonomy Schools**
- Center for Inquiry Schools (4)
- Arlington Woods School 99
- Harshman Magnet Middle School

**IPS Central Services**
- Interviews with central services leadership and budget managers

**SBA Working Group**
- Central services department leads
- Principals
- Professional Advisory

**Roundtables/Focus Groups**
- Principals, APs and teacher leaders
- 14 opportunities

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**Professional Development**

- Three separate modules
- In-person and online
- Large groups, small groups and one-on-one

- Student-Based Allocation funding basics
- Flexibilities
- Budget tool/allocation sheets
approved SBA items

Weights Approved by IPS Board of School Commissioners

- Grades K–2
- Grade 7
- Grade 9
- Poverty

Fall Adjustments

- True-up budgets to reflect actual enrollment vs. projected

Average Salary Methodology

- Charge school budgets the district average teacher salary for each position (instead of the actual teacher salary amount)

Items approved by the IPS Board of School Commissioners on 8/26/16
projected weight calculation

Base: $3,862

01
Supplemental: $910 per Pre-K and self-contained student

02
Poverty: $500 per student in poverty

03
Grades: $400 per student for Grades K–2, 7 and 9

Note:
• Weight calculations based on current enrollment and revenue projections
• The presented dollar amounts ONLY include resources allocated through the SBA formula (Not included: ESL, Special Education, Choice Program funding, Grants, Transformation Zone resources, etc.)
# Example of School Allotment

## Allocation Source (Under SBA)

<table>
<thead>
<tr>
<th>Allocation Source (Under SBA)</th>
<th>$PP</th>
<th>Students</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Allocation</td>
<td>$3,862</td>
<td>349</td>
<td>$1,347,838</td>
</tr>
<tr>
<td>Grade Weight - K</td>
<td>$400</td>
<td>50</td>
<td>$20,000</td>
</tr>
<tr>
<td>Grade Weight - 1&lt;sup&gt;st&lt;/sup&gt;</td>
<td>$400</td>
<td>50</td>
<td>$20,000</td>
</tr>
<tr>
<td>Grade Weight - 2&lt;sup&gt;nd&lt;/sup&gt;</td>
<td>$400</td>
<td>61</td>
<td>$24,400</td>
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<tr>
<td>Poverty Weight</td>
<td>$500</td>
<td>302</td>
<td>$151,000</td>
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<tr>
<td><strong>Total:</strong></td>
<td><strong>$1,563,238</strong></td>
<td></td>
<td></td>
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</table>

## Federal & Grant Funding (not comprehensive)

<table>
<thead>
<tr>
<th>Federal &amp; Grant Funding (not comprehensive)</th>
<th>Resources outside of SBA (not comprehensive)</th>
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</thead>
<tbody>
<tr>
<td>Title I Allocation</td>
<td>Custodial Services</td>
</tr>
<tr>
<td>Title I Allocation</td>
<td>$124,238</td>
</tr>
<tr>
<td>Title II/III Allocation</td>
<td>$16,799</td>
</tr>
<tr>
<td>Grant Funding</td>
<td>$40,000</td>
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<tr>
<td>Grant Funding</td>
<td>$100,000</td>
</tr>
<tr>
<td>Transformation Zone Support</td>
<td>ESL</td>
</tr>
<tr>
<td>Transformation Zone Support</td>
<td>$78,987</td>
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<tr>
<td><strong>Total:</strong></td>
<td><strong>$281K</strong></td>
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<tr>
<td><strong>Total:</strong></td>
<td><strong>$760K</strong></td>
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</table>

## Other Funds (not comprehensive)

<table>
<thead>
<tr>
<th>Other Funds (not comprehensive)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PTA/Fundraisers</td>
<td>$50,000</td>
</tr>
<tr>
<td>Corporate Sponsorships</td>
<td>$16,789</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>$66,789</strong></td>
</tr>
</tbody>
</table>
transition process details

1. Cap per-pupil gains and losses due to student-based allocations

2. Avoid dramatic resource shifts year-over-year

3. Cap gains at 4% and losses at 6% or $130,000 whichever is smaller
moving towards equity

Results based on current enrollment and revenue projections

<table>
<thead>
<tr>
<th>Year</th>
<th>ES/K-8 within 10% of Median $PP</th>
<th>ES/K-8 within 20% of Median $PP</th>
<th>SS within 10% of Median $PP</th>
<th>SS within 20% of Median $PP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016–2017</td>
<td>74%</td>
<td>89%</td>
<td>44%</td>
<td>78%</td>
</tr>
<tr>
<td>2017–2018</td>
<td>83%</td>
<td>89%</td>
<td>60%</td>
<td>100%</td>
</tr>
</tbody>
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next steps

Ongoing Professional Development, Training and Communication

- Basic Concepts
  - School communities and community at large
  - Timely reporting
- Flexibilities
  - Principals and Central Services Staff
- Budget Tools/Allocation Sheets
  - Principals, HR and other Central Services Staff

<table>
<thead>
<tr>
<th>January 5</th>
<th>Deliver PD/Toolkit on how to discuss SBA with staff</th>
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<tbody>
<tr>
<td>January 9</td>
<td>New allocations sent to principals</td>
</tr>
<tr>
<td>January 26</td>
<td>Board reviews school-level allocations</td>
</tr>
<tr>
<td>February 1</td>
<td>Budget decisions due back from principals</td>
</tr>
<tr>
<td>February 1–15</td>
<td>School budgets review cycle</td>
</tr>
<tr>
<td>February 15</td>
<td>SY 2017-18 school year budgets are finalized</td>
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