School Budget Development Guide

School Year 2022-2023

Dear Burlington Community,

As part of the District's ongoing effort to create a more equitable school system for students, families, and staff, in the fall 2020 we embarked on work to create an Equitable Budgeting and Staffing Model and annual process for allocating funding to our schools. Our goal was two fold:

1. Resources, including money, time, qualified staff, appropriate facilities, materials, instructional hardware and software, and academic and other supports – must be distributed in ways to ensure that all students achieve high academic standards;[1] and

2. To increase transparency and community participation in the budget development process.

After analyzing the current budget, we discovered that while the amount budgeted per student is *generally higher* at BSD schools with more students living in poverty, there are outliers. We also confirmed that the percentage of students living in poverty continues to be a strong predictor of average student achievement in BSD schools. It is our obligation to ensure <u>all</u> students have the opportunity to be high achieving and that there is no link between poverty and student proficiency. Our new equitable funding model seeks to reduce these disparities and ensure resources are intentionally allocated where they are needed most.

After engaging with more than 500 BSD students, family members, staff, and members of the community, we are proud to have developed the annual process and model outlined in this guide, which will be implemented for the first time in preparation for school year 2022-20223.

Thank you for your participation and interest in this work.

Tom Flanagan
Superintendent

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[1] Bradley Scott, Ph.D., Director of the Equity Assistance Center at IDRA, developed the *Six Goals of Educational Equity*

Background

Even before embarking on our strategic planning process, BSD identified the need for a transparent and predictable budgeting process to support the District's three priority areas (Equity, Engagement, and Deep Learning), and to ensure resources are serving the students who need them the most. To further understand that need, the Equitable Budget and Staffing Work Group (the "Work Group") analyzed data to assess the extent to which that was already happening within the BSD budget.

The initial analysis clarified that though the schools in each grade band are relatively similar in size, they do serve different populations, and with different resources.

| School Name ▾	Need Index	% Poverty	%SWD	%ELL	%BIPOC	$ per Pupil	Gen Ed $ per Pupil *	% Novice Teachers
Sustainability Academy	3.9	63.1%	27.9%	34.1%	35.8%			5.0%
JJ Flynn Elementary School	3.3	55.0%	24.5%	20.6%	32.6%			6.5%
Integrated Arts Academy	3.4	56.2%	15.1%	28.3%	48.4%			8.0%
Hunt Middle School	3.2	53.7%	25.3%	11.9%	33.6%			2.6%
Edmunds Middle School	2.8	43.3%	17.8%	13.6%	30.7%			2.9%
Edmunds Elementary School	3.1	51.8%	16.9%	18.0%	32.0%			4.0%
Champlain Elementary School	2.6	38.4%	17.8%	9.8%	23.9%			16.7%
CP Smith Elementary School	2.8	43.3%	17.9%	11.4%	26.6%			4.4%
Burlington High School	2.7	43.7%	10.9%	15.8%	37.9%			7.6%

*General Education per pupil is:
$$\frac{(total \$ spent) - (special \ education \ spending) - (English \ learner \ spending)}{(total \ number \ of \ students \ enrolled)}$$

Within BSD, and in American education in general, the percentage of students living in poverty continues to be a strong predictor of average student achievement. Our obligation is to ensure all students can be high achieving and that there is no link between poverty and proficiency.
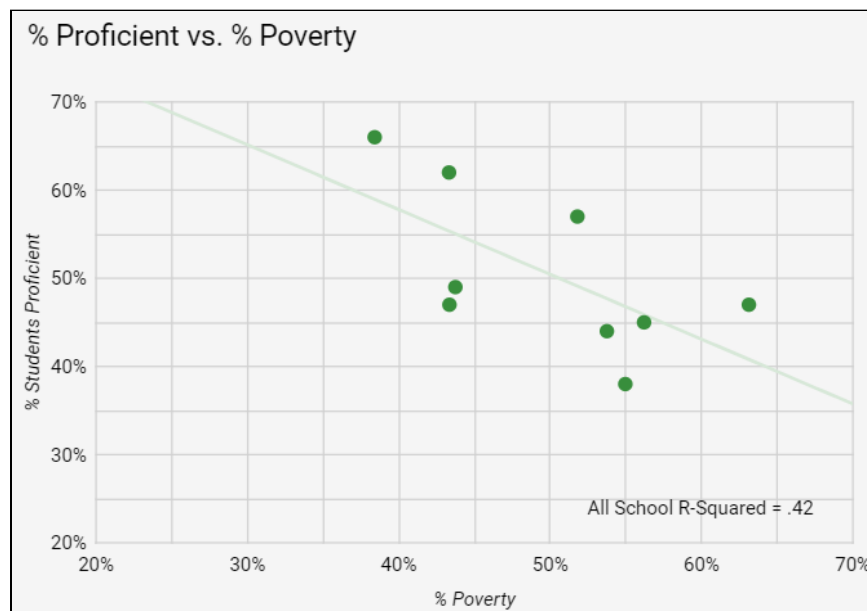
A deeper dive into the general education spending per pupil highlighted that the correlation between spending and poverty was high (R^2=.09), but several schools were well off the trend line. If BSD is going to break the link between poverty and outcomes, there must be a significant and focused investment in those students.

General Per Pupil Spend vs. % Poverty

Gen Ed $pp

All School R-Squared = .09

% Poverty
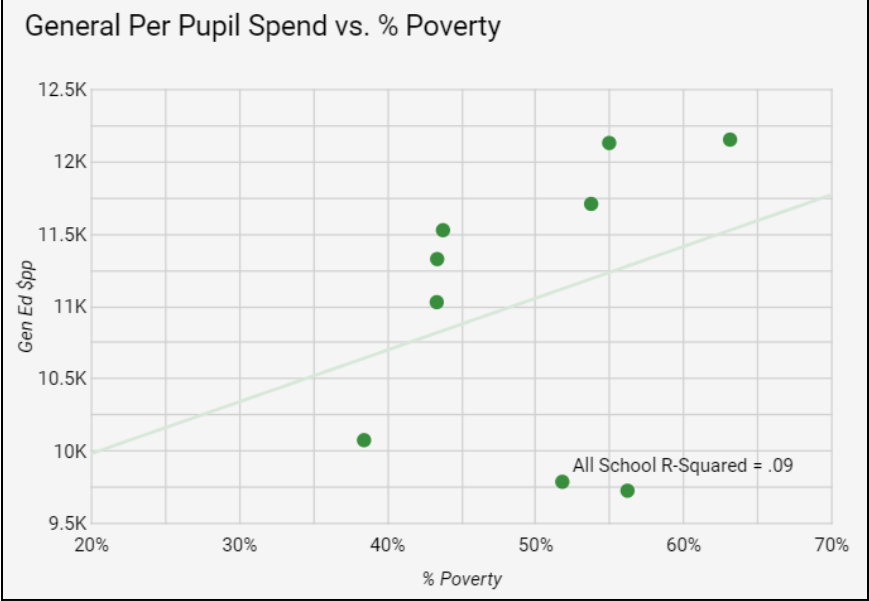
Beyond looking at funding differences, Work Group members also dug into the staffing levels at each school. They found that there were instances where schools had a similar number of students but different numbers of teachers and found positions at some schools that didn't exist at other schools. Taken together, this assessment made the case for a budget model that could be applied more clearly and consistently across schools while empowering school leaders to make decisions for their own unique school population.

Engagement Overview

We know we serve students better when we bring together many different views and voices. The Equitable Budgeting and Staffing Work Group, composed of BSD Principals and other District leaders, was convened early in 2021 to engage with stakeholders and develop an Equitable Budgeting and Staffing Model for allocating resources to BSD schools. Through small group discussions and a survey, we received input from more than 500 stakeholders.

Community Survey

The working group developed and distributed a community survey to the Burlington community in spring 2021. It was distributed via all school newsletters, the BSD website, via Front Porch, and through targeted dual language outreach to families of multilingual learners.

We heard from:

- 450+ students, family members, staff, and community members
- Individuals affiliated with every BSD school and program
- 43.2% of our respondents' students receive free or reduced lunch
- 21.7% of our respondents' students receive special education services
- 20.9% of our respondents self identified as BIPOC
- 14.4% of our respondents speak a language other than English in their home

Key takeaways from the survey included:

*72% of all respondents and 79% of BSD staff **strongly agree or agree that resources should be allocated in a way that supports the students who need them most** - even if it means reducing the resources at their school(s).*

- There is work to be done to increase engagement with families, so they better understand the resources at schools now and how to give input for the future.
- Most say the way they find out about the resources at their school is by talking to the staff at their school (65.1%), so it is important that all BSD staff receive information on the budgeting process.

Small Group Discussions

In addition to the community survey, small group discussions were facilitated with several groups of key stakeholders to allow for feedback as the model was developed.

- **Students:** Superintendent Flanagan and other District leaders held focus groups with diverse groups of students at Burlington High School and Hunt and Edmund Middle Schools.
- **Teachers**: The Superintendent's Teacher Advisory Group and Burlington Education Association (our local teacher and paraeducator union) leadership were consulted and affirmed their support for transparent, equitable budgeting across the District.
- **Cabinet**: The BSD Cabinet is made up of the Superintendent, BSD Principals, and other leaders within the central administration. A subset of this group made up the working group that was most involved in developing the model, and the entire Cabinet was consulted at several points in the process.
- **Burlington Board of School Commissioners**: The BSD School Board was given monthly updates in writing and was update publicly at several board meetings. They also had the opportunity to give critical feedback, which was incorporated into the final budget model and annual proces

Overview of Annual Process

Each year, BSD will build a budget for the following fiscal year. This process will begin with a BSD Town Hall-type meeting in September and formally end with the Town Meeting approving the budget in March. BSD has established a standard annual budget development process in an effort to increase transparency, predictability, and increase community participation.

Annual Process

The following table shows the highlights in the budget development process including the key opportunities for the community to get involved in the process. A more detailed calendar with specific dates will be available on the BSD website during each budget season.

	Process	Engagement Highlights
September	**Staff Roster Confirmation** Just after the start of the school year, Principals will review the rosters of the current staff in their building, so all district data systems are updated and correct.	**BSD Town Hall** BSD will host a Town Hall to explain the budget development process, key dates, and ways to participate. An emphasis will be placed on supporting participation from historically disenfranchised communities. All info will also be posted online after the meeting.
October	**Enrollment Projections** Principals will confirm that the projected enrollment for the following school year is accurate and takes into account any anticipated population changes.	**Advisory Groups and Feedback Form** The Superintendent will provide a budget update to his Student, Teacher, and Family Advisory Groups and request their input. An online feedback form will be posted on the BSD website for the Burlington community to share thoughts.
November	**Budget Allocation** Principals will receive a budget allocation for their school including an allocation of positions for staff, non-personnel funds for items like supplies and field trips, and a RISE Allocation.	**Engagement with Key Stakeholders** Principals will meet with key groups throughout October, November, and December to inform their RISE Allocation Proposal and overall budget submission. These groups include but are not limited to: • School Advisory Group (SAG) • Staff • Students • October Parent Teacher Organization (PTO) meeting • Focused engagement with families of English learners and students with individualized education plans
December	**Finalize School Budget Submission** Principals will engage with their SAG, Parent Teacher Organization (PTO), students, and others to finalize their schools budget submission including RISE allocation proposal.	
January	**Finalize District Budget for Board** The Superintendent will submit the final district budget to the Board for approval later in the month.	**Message from the Superintendent** The Superintendent will share the highlights of the overall district budget submission with the community.

Town Meeting to approve district funding level in March.

Principal Leadership

We believe that the leaders who know their students best and are best equipped to build a budget that meets their needs is the principal at each BSD school. Under this new model, principals have been empowered to lead a robust community engagement process at their school and then, using that input, develop a staffing and budget plan for their school that makes sense for their school.

School Advisory Groups

We believe that community engagement must be both deep and wide to be effective and that school budgets cannot be "one size fits all." When budget development is decentralized, it leads to more creativity, smarter spending, and better outcomes for students. For these reasons, each school will convene a School Advisory Group (SAG) made up of at least two family members, students, and staff representatives to directly advise the school's principal as they create the school's budget. These community representatives will go deep to become local experts on the budgeting process and their school's budget and will use that expertise to provide their principal substantial, ongoing input.

The SAG will meet at least two times in the fall to:
- Receive a brief training on the BSD budget development process and model.
- Share what they believe is going well and areas where additional investment could be helpful.
- Review the school's budget allocation including its RISE Allocation.*
- Make very specific recommendations for how the school's RISE Allocation can be budgeted to implement focus initiatives to support the priority student groups.

*See pages 7 and 8 for more information about RISE Allocations.*

Final Budget Approval

Principals will consider recommendations from their SAG and other members of their community before submitting their school's RISE Allocation proposal and school budget to the superintendent for final approval and inclusion in the District's budget. The District's budget is approved by the Burlington School Board in January before the District's funding for the coming year is approved by voters on Town Meeting Day in March.

Model Overview

BSD is committed to aligning our budget resources with our shared belief in equity and to building an annual budget process that prioritizes engagement. Our new budget model is a formula for distributing our limited resources between schools and programs in a way that ensures every school has what it needs and the students who need the most get the most.

The Model
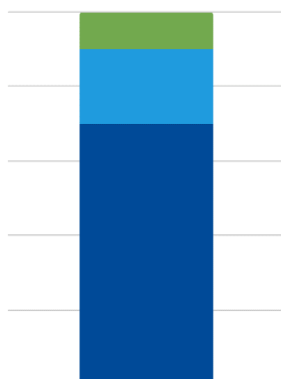
A **Recognizing Injustice and Seeking Equity (RISE) Allocation** will provide funding using a **weighted student formula**, meaning more funds in schools with greater need.

Non-personnel funds for supplies and materials will be allocated on a **per-student** basis.

A **baseline staffing model** will provide each school with its core staffing, using ratios of staff to students (e.g. 1 counselor for every 250 students).

Recognizing Injustice and Seeking Equity (RISE) Allocation

Our community wants to live its values; more than 70% of survey respondents agreed that resources should be distributed in a way that supports students who need them most, **even if it meant reducing resources at their own schools**. The Recognizing Injustice and Seeking Equity (RISE) Allocation will provide a budgetary home for that work.

Each year, BSD will set aside a significant amount of funding for equity-focused initiatives at the school level. Principals, in collaboration with their school communities, will create plans to use these resources tied to our strategic plan goals.

RISE Allocations will be determined using a *Weighted Student Formula*, where dollar amounts are multiplied by the number of students at each school in the student group(s) that have been targeted for support in the upcoming school year. The weight given to each group will be based on the Pupil Weighting Factors Report prepared by the Vermont Agency of Education in partnership with the University of Vermont, Rutgers University, and American Institutes for Research. After receiving their allocation, schools will design plans to use these funds to invest in the students who need the most, including desired outcomes.
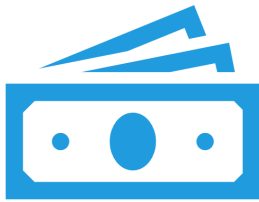
Non-Personnel Funds

Each school will receive $250 per student in non-personnel funds. These are used to purchase supplies and materials, and to support activities like field trips. Middle and high schools will also receive an allocation to support the purchase of replacement textbooks.

Baseline Staffing Model

Positions will be allocated to each school based on the projected number of students who will be enrolled the following school year. Individual schools may have additional staff beyond these baseline allocations that will be incorporated into this model in future years.

RISE Allocation Internal Grant

Each year, the District's leadership will identify student groups that are in need of additional support based on student learning data and focus initiatives tied to BSD's strategic plan. Schools will then be invited to submit plans for equity-based funding to support innovative approaches for increasing the achievement of students furthest from opportunity and closing the opportunity gap in BSD. It is likely that the priority student groups and/or focus initiatives will be adjusted each year as student performance improves.

Academic leadership teams should propose supports that are goal-driven, aligned to student outcomes, and provide the most struggling students with access to grade-level learning. Schools may use funding for new initiatives or existing programs, and may use the funding to support both personnel and non-personnel items.

Application Process

1. **Focus Area Selection**

   In the first phase of the planning process, school leadership teams will engage their SAG and identify which focus area they wish to support, with principal's bringing those areas to the superintendent for discussion. Once focus areas have been mutually agreed upon, schools can begin planning in detail.

2. **Proposal & Budget Development**

   Using a template, schools will describe their intended proposal(s) and the items they wish to fund using their RISE Allocation. The form will also include intended outcomes (goals) and the measures they will use to assess impact.

3. **Program Review**

   All proposal(s) will be shared with the BSD Cabinet for their feedback and suggestions. Principals will have an opportunity to use this feedback back to revise their proposals.

4. **Superintendent Approval**

   Ultimate approval will be given by the Superintendent.

Closing

We believe that our students receive a better education when all voices are heard. We look forward to continuing this conversation as we prepare for school year 2022-2023.

Thank you to the students, families, teachers, and other BSD staff who were instrumental in the creation of this budget model.

We would like to extend a special thank you to the following BSD leaders who made up the Equitable Budgeting and Staffing Work Group for the many hours they spent learning, listening, and collaborating to develop the BSD budget model and annual process.

Nathan Lavery, Chair
Executive Director of Finance and Operations

Kevin Robinson
Principal of Integrated Arts Academy

Ali Dieng
Former Parent University Manager/Founder

Mattie Scheidt
Principal of Hunt Middle School

Christy Gallese
Director of Expanded Learning Opportunities

Henri Sparks
Director of Equity and Safe inclusive Schools

Barry Gruessner
Grants Director

Karyn Vogel
Data Systems Coordinator

Lauren McBride
Principal of Burlington High School

Lashawn Whitmore-Sells
Principal of Flynn Elementary School

While much work has been done, there is still so much to do. As we implement this model for the first time during fall 2021, we are confident that we will get many things right but not everything. We appreciate your patience, and we hope to have your continued support as we make further improvements to the model based on the strong foundation we have built together.