FTWG
(Financial Transparency Working Group)

November 16, 2016

"Fitwig"

Participating SEAs

Arizona: Mark Masterson
Colorado: Jennifer Okes
Connecticut: Kathy Demsey
Delaware: David Blowman
Florida: Mark Eggers
Hawaii: Amy Kunz
Illinois: Robert Wolfe
Maine: Tyler Backus
Maryland: Kristy Michel
Massachusetts: Rob O'Donnell
Mississippi: Donna Nester
Missouri: Chris Neale

Nebraska: Dean Folkers
North Dakota: Adam Tescher
Ohio: Colleen Grady
Oregon: Michael Wiltfong
Rhode Island: Cynthia Brown
South Dakota: Tami Darnell
Tennessee: Chris Foley
Virginia: Kent Dickey
Washington, D.C.: Shana Young
Wyoming: Jed Cicarelli

Participating LEAs

Boston, MA: Eleanor Laurans
Bristol Warren, RI: Pauline Silva
Cleveland, OH: Derek Ritchey
Durango, CO: Jennifer Macho-Seekins
Gulfport, MS: Dana Fleming
Houston, TX: Mark Smith
Indianapolis, IN: Weston Young
Milwaukee, WI: Shannon Gordon
Minneapolis, MN: Ibrahima Diop
New York City, NY: Karma Wilson
Revere, MA: Dianne Kelly & Matt Kruse

Western Heights, OK: Joe Kitchens
Woonsocket, RI: Brad Peryea

Partners

CCSSO
Chiefs for Change
ERS
Data Quality Campaign
Afton Partners
Education Strategy Group
Schoolzilla
Education First
Whiteboard Advisors
Collaborative Systems, Services
DMC
And more…

Every Student Succeeds Act Language

ESSA requires that SEAs report:

*"The per-pupil expenditures of Federal, State, and local funds, including actual personnel expenditures and actual nonpersonnel expenditures of Federal, State, and local funds, disaggregated by source of funds, for each local educational agency **and each school** in the State for the preceding fiscal year."*
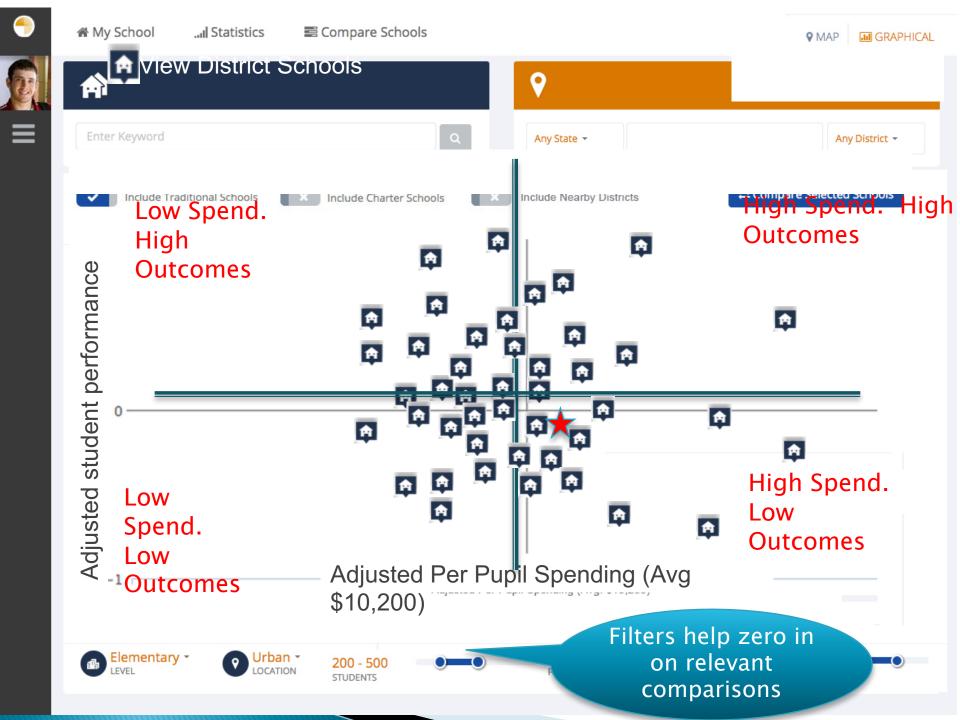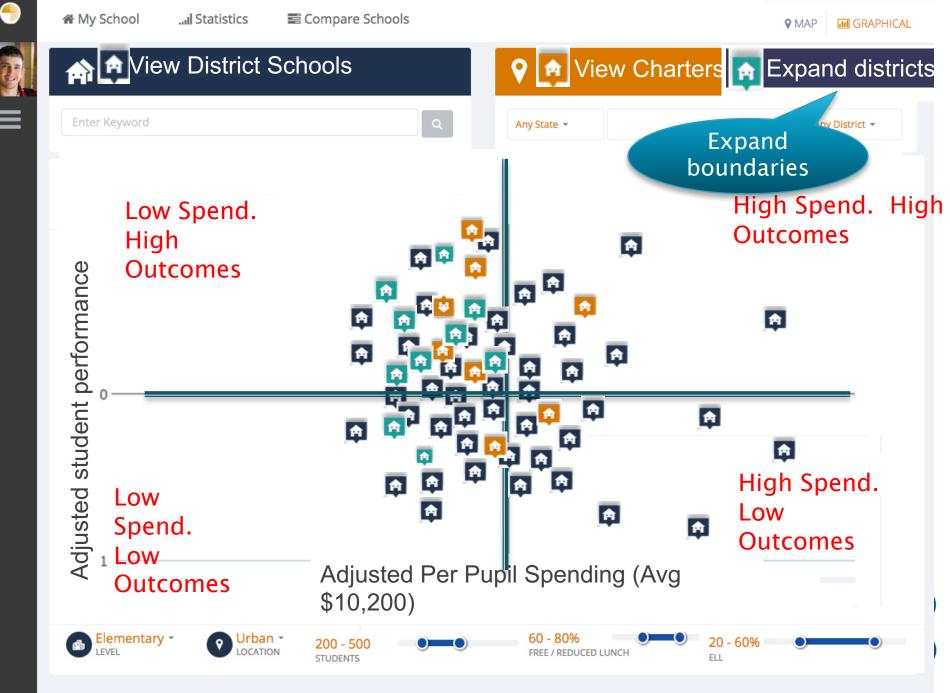
Deadline = Dec. 2018 for 2017-18 school year.

The value of school-level spending data

- **School as an important unit in the ed system.** We already report outcomes by school, and this step will add expenditures.

- **Activate school-level engagement in order to leverage dollars to do the most for students.** Research indicates that school-level behaviors/actions/factors play a big role in determining the relationship between expenditures and outcomes. School level financial data can help activate these factors

- **Explore equity implications.** With SEA-defined expenditure reports, these data can be presented in a way that enables communities to explore local solutions to address inequities over time.

IF YOU DON'T COMPARE YOUR FINANCES

I'M GONNA COME OVER THERE AND...

memegenerator.net

SEAs will be grouped by current access to school –level financial data

1. SEA has a common chart of accounts (COA) including a field for location

⇊

SEA collects G/L data with COA & location

⇊ ⇊

1.a. COA uses _real_ salaries:
RI,   DE
OH
MS
HI*

1.b. COA uses _average_ salaries:
MA

1.c. SEA hasn't yet collected G/L data from districts with COA & location (or is in pilot phase):
NE,   OR

2. SEA has SLFS (or similar) data by school (SLFS is a subset of school–level fin. data points):
CO, DC
ME, FL
WY, MD

3. SEA has real salaries/benefits of personnel with location

⇊ ⇊

3.a. All school personnel
CT

3.b. Only cert/inst. personnel
IL,

4. SEA does not yet have access to financial information by school:
ND   VA   AZ
SD   MO

All SEAs and LEAs will also need

2. School level demographic data:

3. School level outcomes/performance data:

Fitwig will provide:

1. Working virtual group meetings on topics related to meeting the requirement, with examples from FTWG members (2-3X/month)
2. In person meeting (Feb 8-10 in DC)
3. Tools/cases/reports/other materials on dedicated website
4. Individualized SEA/LEA support (see next slide)

Individualized SEA/LEA support will come in two forms

A. **Lighter Touch Support:** Available to all. During office hours and in group meetings. Can include:
   ◦ Review a data plan
   ◦ General data alignment issues
   ◦ SEA decisions about attribution of different expenditure types
   ◦ Review of SEA/LEA equity runs
   ◦ Guidance on visualization options, communications

B. **More Customized Support:** For SEAs/LEAs <u>consistently working at a faster pace</u>. Could include:
   ◦ Assistance with integration of data.
   ◦ Equity analysis of SEA/LEA data
   ◦ Import your data into a visualization framework
   ◦ Assist with drafting communication messaging
   ◦ *Will feed into sharable materials*

Near term meeting topics

- Review existing examples – what works, what's missing?
- Data inventory/Data plan
- Converting from average to real salaries
- How to marry SLFS data with other data to complete the financial picture
- Collecting financial data from districts
- Exploration of sample school-level data visualization
- Attribution rules (e.g. what's included, what's not, how to divvy up centrally managed expenditures, funds for special student types)
- What do the data runs show?
- Parsing data for different users

Likely meeting topics

☑ Strongly encouraged
✓ Based on your circumstances

Who should attend:	1	2	3	4	LEAs
Review existing examples – Dec. 1 Meeting	☑	☑	☑	☑	☑
Data inventory/Data plan	✓	✓	✓	✓	✓
Converting from average to real salaries	☑		☑	☑	
How to marry SLFS data or salary data with other data to complete the financial picture		✓			
Collecting financial data from districts			✓	✓	✓
Exploration of sample school–level data visualization to meet requirement	☑	☑	☑	☑	☑
Attribution rules (e.g. what's included, what's not, how to divvy up centrally managed expenditures, funds for special student types)	☑	☑	☑	☑	☑
What do the data runs show?	☑	☑	☑	☑	☑

In Person Meeting

- February 8–10, 2017
- Washington, D.C.
- Programming for SEAs and LEAs
- Co-hosted by CCSSO
- Many partners present

What's next

- Recorded webinar available online
- Follow-up email w/ access to member website & information for our next call
- Data inventory materials/requests to be circulated
- Next meeting date is: Dec. 1, 1-2PM EST
  - *Review Existing Examples*
- Edunomics Lab will stay on until 2:30PM EST to answer any additional questions