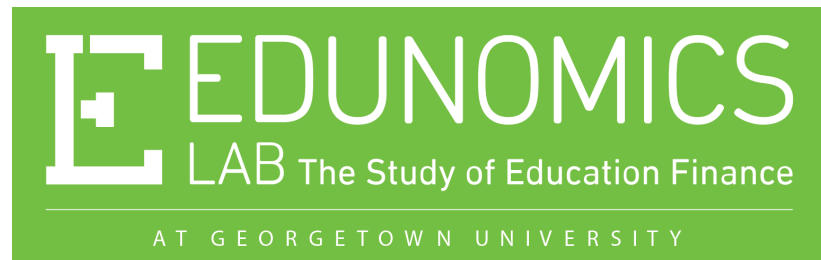


Financial Transparency Working Group: New Year's Edition

January 11, 2018



Agenda

1. New Year's resolutions!
2. Annual refresher of law, regs, guidance
3. What's the upside of FT again?
4. Preview of in-person meeting



WHAT EXACTLY IS
"A NEW YEARS
RESOLUTION"?

IT'S A
"TO DO" LIST
FOR THE
FIRST WEEK
OF JANUARY.

Happy New Year!

New to FiTWiG? Potential resolutions (to-dos)

1. Schedule a meeting of all departments at SEA who will be involved in this to discuss priorities for the FT data system.
2. Communicate to LEAs about the requirement.
ELab communications memo template may be helpful –
Use question box to request copy
3. Request data from subset of LEAs and run analyses.
Can use a) Basic table or b) SLFS converter



Basic table

	District 1			District 2		
	Elementary School #11	Elementary School #12	Middle School #17	Elementary School #13	Middle School #22	High School #31
	A: Enrollment	375	511	992	442	992
Site level						
B: Federal	\$456	\$209	\$164	\$197	\$222	\$356
C: State/Local	\$6,111	\$4,756	\$5,998	\$6,987	\$5,124	\$5,982
D: Site level total	\$6,567	\$4,965	\$6,162	\$7,184	\$5,346	\$6,338
Site share of central						
E: Federal	\$161	\$161	\$161	\$621	\$621	\$621
F: State/Local	\$5,378	\$5,378	\$5,378	\$4,921	\$4,921	\$4,921
G: Site share of central total	\$5,539	\$5,539	\$5,539	\$5,542	\$5,542	\$5,542
H: Total school expenditures	\$12,106	\$10,504	\$11,701	\$12,726	\$10,888	\$11,880
<p style="color: red; text-align: center;">This red number is the one that can be compared for schools in different districts</p>						
I: Total District Exclusions/ Total District Expenditures	\$2,416,986 \$21,514,686			\$5,531,868 \$41,409,428		
J: Excluded Expenditures	<i>Debt, capital, equipment, special education transfers to private schools, adult education, pre-K</i>			<i>Debt, capital, equipment, special education transfers to private schools, adult education</i>		
K: Enrollment Count Procedure	ADA, student count Oct. 1			ADA, student count Oct. 1		

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1. Schedule a meeting of all departments at SEA who will be involved in this to discuss priorities for the FT data system.
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3. Request data from subset of LEAs and run analyses.
Can use a) basic table or b) SLFS converter
4. Establish a working group of stakeholders.
Suggested members: diversity of LEA reps, affiliated associations
5. Request a one-on-one phone consultation with Edunomics Team.
Use question box to request consultation or email Katie.Hagan@georgetown.edu
6. Book tickets to in-person meeting! 😊



Veterans: Potential resolutions (to-dos)

1. Crosswalk your state's plan to IFR Criteria.
From Dec. 4 webinar (document coming)
Can send state reporting plans or draft instructions to LEAs to us, and we'll do the crosswalk for you.
2. Schedule summer training and analyses of 2017-18 data.
For LEAs: Might cover improved data recording and usage, visualization, communicating with stakeholders
3. Expand current analyses to explore equity patterns in districts (next meeting will focus on equity analyses).
4. Book tickets to in-person meeting! 😊

What Elab/BSCP resources currently exist?

Papers / Documents:

- Data Inventory
- Moving from Inventory to Action
- Four Approaches to Assigning Costs
- SEA FT communication template

For past webinars:

www.edunomicslab.org/financial-transparency-working-group

For most other materials, visit:

<http://www.bscpcenter.org/ftresources/>

For communication template: please use question box or email Katie.Hagan @georgetown.edu

Tools & Videos

- All past FitWiG recorded webinars
- Financial Transparency 101 webinar
- Equity & Financial Transparency video series
- The Productivity Opportunity activity guide
- School Level Finance Survey Converter Tool



State-Developed Resources:

Stakeholder communication:

- Illinois: Webinar slides and Q&A
www.isbe.net/essa under the "Site-Based Expenditure Reporting" header
- Indiana: communications memo via email
- Nebraska: new coding structure

<https://www.education.ne.gov/fos/annual-financial-report-school-district/201819-essa-financial-coding-information/>

State Instructions to LEAs:

- New Jersey accounting guidance
<http://www.state.nj.us/education/finance/fp/af/ESSAPerPupilExpenditures.pdf>
- Missouri: ESSA coding changes

<https://dese.mo.gov/financial-admin-services/school-finance/fy-2019-accounting-changes>

Does your state have resource that can be shared with the group?

Use question box or raise hand to share.



Accounting Rules/SEA Instructions for LEAs

- Emphasis on value proposition – even though the doc is about compliance, it doesn't have to skip the benefits of FT
- Clear role delineation – readers know who (state or LEA) is doing what (e.g. apportioning costs)
- Accuracy – no citing of repealed regs or guidance

For states that have already created these documents, what's been helpful? Any pitfalls to avoid?

COMING SOON: ELab template for instructions to LEAs that SEAs can modify based on the IFR. Hoping to release in advance of in-person meeting.



True/False: Financial Transparency Regs/Guidance

- T/F 1. ESSA requires that each state report spending by school on district report cards.
- T/F 2. The U.S. DOEd has in effect, a set of regulations and guidance about the financial transparency reporting requirement.
- T/F 3. Prior regulations and guidance regarding the per pupil expenditure reporting was repealed by Congressional Review Act in early 2017.
- T/F 4. States must develop a uniform way for all LEAs to apportion funds to school and district levels to meet the requirement
- T/F 5. The main component states have to base decisions around per-pupil spending reporting on is the one sentence in the law.

Title I, Part A, Sec. 1111

Annual State Report Card Requirements

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.

REPEALED 2016 Regulations & Guidance:

Guidance and regulation websites are still “live”, but policies are no longer in effect.

As of now, U.S. Dept. of Ed has not released any *new* guidance, as they hinted they might do before the end of 2017. *Our recommendation: use IFR Criteria and forthcoming IFR “Instructions to LEAs” template.*

What to do? Can defer to IFR.

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True/False: Financial Transparency & Extension

- T/F 1. The Department of Education issued a “Dear Colleague Letter” that granted an extension such that states can begin reporting for the 2018-19 school year.
- T/F 2. To receive an extension to postpone until 2018-19 SY, states must apply to the DoE.
- T/F 3. To delay until 2018-19 SY, states must provide on report cards for the 2017-18 school year a brief description of how it will meet the requirement for 2018-19.
- T/F 4. Extensions can be revoked in states where elementary students refuse to eat their spinach.

What's so great about FT?

Can pair outcomes by school with spending by school!!!!

- Enable school leaders to **benchmark** how well they are able to leverage resources to maximize outcomes == trigger more ownership
- Encourage leaders to **discover** spending and outcomes patterns across like-peers and **adopt** strategies that have been successful elsewhere. (Improve use of \$)
- Prompt district leaders to be more thoughtful or **equitable** when deploying funds across schools.
- Prompt healthy dialogue and engagement within communities about **tradeoffs**.



FiTwiG In-Person Meeting: Feb. 7, 2018

- Where: Washington, D.C.
 - *Renaissance Washington Hotel, 999 Ninth. St. NW*
- When:
 - Opening reception: evening of Feb. 6
 - Main meeting: Feb. 7, 8am-4pm
- Look for email from CCSSO for registration details, costs covered by CCSSO for one person from each state (add'l attendees at cost of SEA)
- Agenda includes: federal updates, state collaboration and problem solving, final IFR criteria, LEA training discussion, and data visualization



Next virtual meeting:

- Jan. 23, 1-2pm ET, Spotlight on Equity
- Katie will send invites after this call

Need some one-on-one, state specific assistance? Set up a call with us! Email Katie to schedule (katie.hagan@georgetown.edu).



FiTWiG Supporters

BILL & MELINDA
GATES *foundation*

