FiTWiG

Financial Transparency Working Group

How Ready Are You for FT Reporting?
Use the Checklist to Find Out

May 15, 2018

Agenda

1. A checklist for the SEA in preparing for school level financial transparency

2. Check in on state questions

Two possible state timelines for FT reporting:

1. Report PPE for the 17-18 SY on report cards – "**Overachievers**"

2. Delay reporting until 18-19 SY – "**Most states**"

"Overachievers"	"Most States"
CO, FL, GA, LA, MA, MS, OH, RI, WY	AZ, CA, CT, DC, DE, HI, ID, IL, IN, IA, ME, MD, MI, MO, MT, NE, NJ, NY, NC, ND, OR, SD, TN, UT, VT, VA, WA, WV, WI

Is your state classified correctly?

IF YOU COULD STOP OVERACHIEVING AND MAKING US ALL LOOK BAD

THAT'D BE GREAT

quickmeme.com

For those delaying until 2018-19 SY

T/**F**   1. To receive an extension to postpone until 2018-19 SY, states must apply to the DoE.

T/F   2. 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

2018-19 SEA Checklist Big Categories

1. Inventory existing data

2. Develop school level PPE data plan

3. Plan for data capture, recording, verification, and reconciliation

4. Communicate data plan

5. Data reporting and visualization

6. Review, reflect and revise, based on Year 1

7. Additional communication, training, tools, etc.

Action	Responsible Party	Timeline / Completed
1. Inventory existing data		
a. Follow steps in BSCP Center Data Inventory		
2. Develop School Level PPE Data Plan (mechanics of how PPE is calculated)		
a. Assemble a team/task force		
b. Clarify any prescriptions for separating school vs central		
c. Clarify exclusions		
c. Compare plant to Interstate Financial Reporting (IFR)		
e. Explore existing data from LEAs in context of the plan		
f. Verify plan works for special cases (small LEAs, charters, special education centers, transfers, pre-K, payments to regional cooperatives, etc.)		
g. Share data plan with Edunomics Lab for feedback		
h. Make any needed changes to COA		
j. Identify relevant roles for SEAs and LEAs (e.g. clarify who will allocate central/shared costs, LEAs or SEA)		
k. Issue formal instructions to LEAs		
l. Educate/train LEAs on the plan		
m. Share data plan with vendors, if appropriate		
3. Plan for data capture, recording, submission, reconciliation and verification		
a. Identify how data will be submitted/captured		
b. Set deadline for data submission to SEA (*align with F-33 data submission if appropriate*)		
c. Establish process for validating/reconciling data (e.g. with F-33 data sources)		
d. Identify process for providing support to LEAs as issues arise during year		
e. Communicate data capture, validation, and support process to LEAs		
f. Prepare data system for submission/collection		
g. Identify how PPE figures are aggregated once LEA data is received (who will do what?).		
h. Identify data/process by which final PPEs will be shared with LEAs prior to public reporting		
4. Communicate data plan to key groups		
(via webinars, conferences, meetings, email, FAQs, data collection templates, etc.)		
a. SEA leaders and staff		
b. State Board of Education		
c. Legislature		
d. Statewide membership organizations (ASBO, Sup's Assoc., School Boards Assoc., Principals Assoc.)		
e. LEAs		
f. Local school boards		
etc.)		
5. Data reporting and visualization		
a. (For those starting in 2018-19) Ensure report card has information for one-year extension		
office)		
c. Identify questions you want visualization to answer. See Edunomics activity		
d. Determine if SEA will build own visualization or issue a contract to a vendor (if contract, issue RFP)		
e. Model potential reports and visualizations with available prior year data		
f. Share sample data visualizations with LEAs for feedback		
g. Ensure data are accessible via report cards (if visualization is different from report cards)		
h. Educate constituencies on how to utilize final and published data visualization and reporting tools		
6. Review, reflect, and revise efforts based on Year 1		
a. Solicit feedback from LEAs on all aspects of Year 1: data plan, capture, reporting and visualization		
b. Consider adjustments where appropriate		
c. Communicate any changes to LEAs and others as needed		
7. Additional communication, training, tools, etc.		
(this section is under development, but could include the following)		
a. Communicate with stakeholders about release of school level PPE data		
b. Communicate value/limitations of the data		
c. Develop resources/training on data utilization by LEAs etc. (equity analyses, productivity analyses)		
d. Other?		

Action	Responsible Party	Timeline / Completed
1. Inventory existing data		
a. Follow steps in BSCP Center Data Inventory		
2. Develop School Level PPE Data Plan (mechanics of how PPE is calculated)		
a. Assemble a team/task force		
b. Clarify any prescriptions for separating school vs central		
c. Clarify exclusions		
d. Compare plan to Interstate Financial Reporting (IFR)		
e. Explore existing data from LEAs in context of the plan		
f. Verify plan works for special cases (small LEAs, charters, special education centers, transfers, pre-K, payments to regional cooperatives, etc.)		
g. Share data plan with Edunomics Lab for feedback		
h. Make any needed changes to COA		
i. Identify relevant roles for SEAs and LEAs (e.g. clarify who will allocate central/shared costs, either LEAs or SEA)		
j. Issue formal instructions to LEAs		
k. Educate/train LEAs on the plan	**State example: IL**	
l. Share data plan with vendors, if appropriate		

Action	Responsible Party	Timeline / Completed
3. Plan for data capture, recording, submission, reconciliation and verification		
a. Identify how data will be submitted/captured		
b. Set deadline for data submission to SEA (align with F-33 data submission if appropriate)		
c. Establish process for validating/reconciling data (e.g. with F-33 data sources)		
d. Identify process for providing support to LEAs as issues arise during year		
e. Communicate data capture, validation, and support process to LEAs		
f. Prepare data system for submission/collection		
g. Identify how PPE figures are aggregated once LEA data are received (who will do what within the SEA?).		
h. Identify data/process by which final PPEs will be shared with LEAs prior to public reporting		

State example: RI, GA

Action	Responsible Party	Timeline / Completed
4. Communicate data plan to key groups *(via webinars, conferences, meetings, email, FAQs, data collection templates, etc.)*		
a. SEA leaders and staff		
b. State Board of Education		
c. Legislature		
d. Statewide member orgs (ASBO, Sup's Assoc, School Boards Assoc, Principals Assoc.)		
e. LEAs		
f. Local school boards		
g. Develop a public version of data plan instructions to explain PPE (for advocacy, news, stakeholders, etc.)		

State example: NY Board of Regents

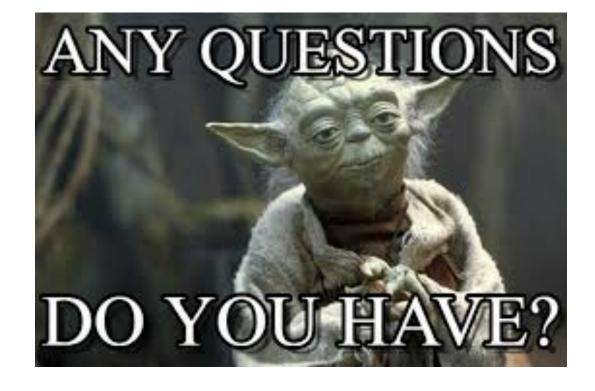| Action	Responsible Party	Timeline / Completed
5. Data reporting and visualization		
a. (For those starting in 2018-19) Ensure report card has information for one-year extension		
b. Convene individuals involved in data & visualization at SEA (e.g. CIO, accountability office, comms office)		
c. Identify questions for visualization to answer. See Edunomics activity		
d. Determine if SEA will build own visualization or issue a contract to a vendor (if contract, issue RFP)		
e. Model potential reports and visualizations with available prior year data		
f. Share sample data visualizations with LEAs for feedback		
g. Ensure data are accessible via report cards		
h. Educate constituencies on how to utilize final and published data visualization and reporting tools		

State example: CO

Action	Responsible Party	Timeline / Completed
6. Review, reflect, and revise efforts based on Year 1		
a. Solicit feedback from LEAs on all aspects of Year 1: data plan, capture, reporting and visualization		
b. Consider adjustments where appropriate		
c. Communicate any changes to LEAs and others as needed		
7. Additional communication, training, tools, etc. *(this section is under development, but could include the following)*		
a. Communicate with stakeholders about release of school level PPE data		
b. Communicate value/limitations of the data		
c. Develop resources/training on data utilization by LEAs etc. (equity analyses, productivity analyses)		
d. Other?		

What'd we miss?

- For states that have already made significant progress: did we miss anything that you've done that you'd recommend?

- What other things are you considering doing that were not on the timeline?

We know time to finalize data plans is coming – do you all have any pressing questions, concerns, or comments for the group?

Next virtual meeting:

June 6, 1-2pm ET

Topic: TBD – office hours or small district concerns

Anyone planning to be at the STATS-DC conference in July (25-27)?

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

FiTWiG Supporters