



SSF

STUDENT SUCCESS FUNDING TASKFORCE

The Student Success Funding (SSF) is the district's funding formula that allocates funds equitably to schools based on the attributes of students.

Commit. Connect. Engage with us as we revisit the SSF formula ensuring that funds continue to be apportioned equitably to all schools in APS.

[EQUITY]

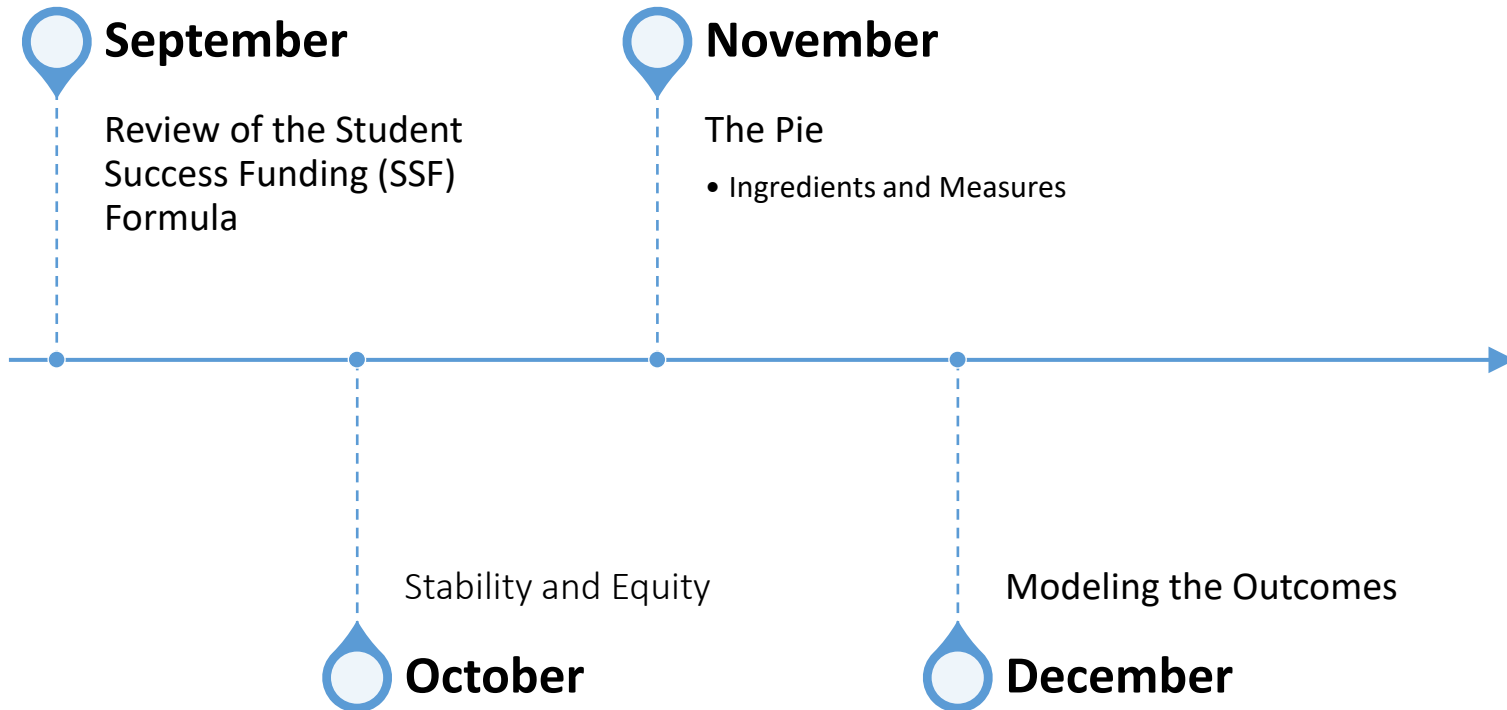
[PERSPECTIVE]

[GET INVOLVED]

[COMMIT TO THE PROCESS]

[TRANSPARENCY]

SSF TASK FORCE OVERVIEW



A GOOD ALLOTMENT MODEL SHOULD BE...

Principle	Description
Student-focused	Provides resources based on students, not on buildings, adults, or programs
Equitable	Allocates similar funding levels to students with similar characteristics, regardless of which school they attend
Transparent	Easily understood by all stakeholders
Differentiated	Allocates resources through a comprehensive framework that is based on student needs
Predictable	School allocation process is predictable and is structured to minimize school-level disruption
Empowering	Empowers school-based decision-making to effectively use resources
Aligned with district strategy	Supports the district's multiyear strategic plan

Table provided by ERS



CHALLENGES OF A TRADITIONAL FUNDING FORMULA

EQUITY

- Allocations based on enrollment tiers created large disparities in funding with schools with similar need and similar enrollment
- Allocations distributed one per school create inequities in schools based on enrollment size
- Allocations did not tightly align with need, especially poverty.
- Allocations subject to “hold-harmless” decisions or rolling-over prior year decisions which create unintentional inequities and put the district at risk of not funding per the guidelines



CHALLENGES OF A TRADITIONAL FUNDING FORMULA

TRANSPARENCY

- Formulas were difficult to understand and explain
- Many formulas contained discretionary language such as “distributed by program manager”
- Lack of history or understanding of formulas original intent; “That’s just how we’ve always done it”

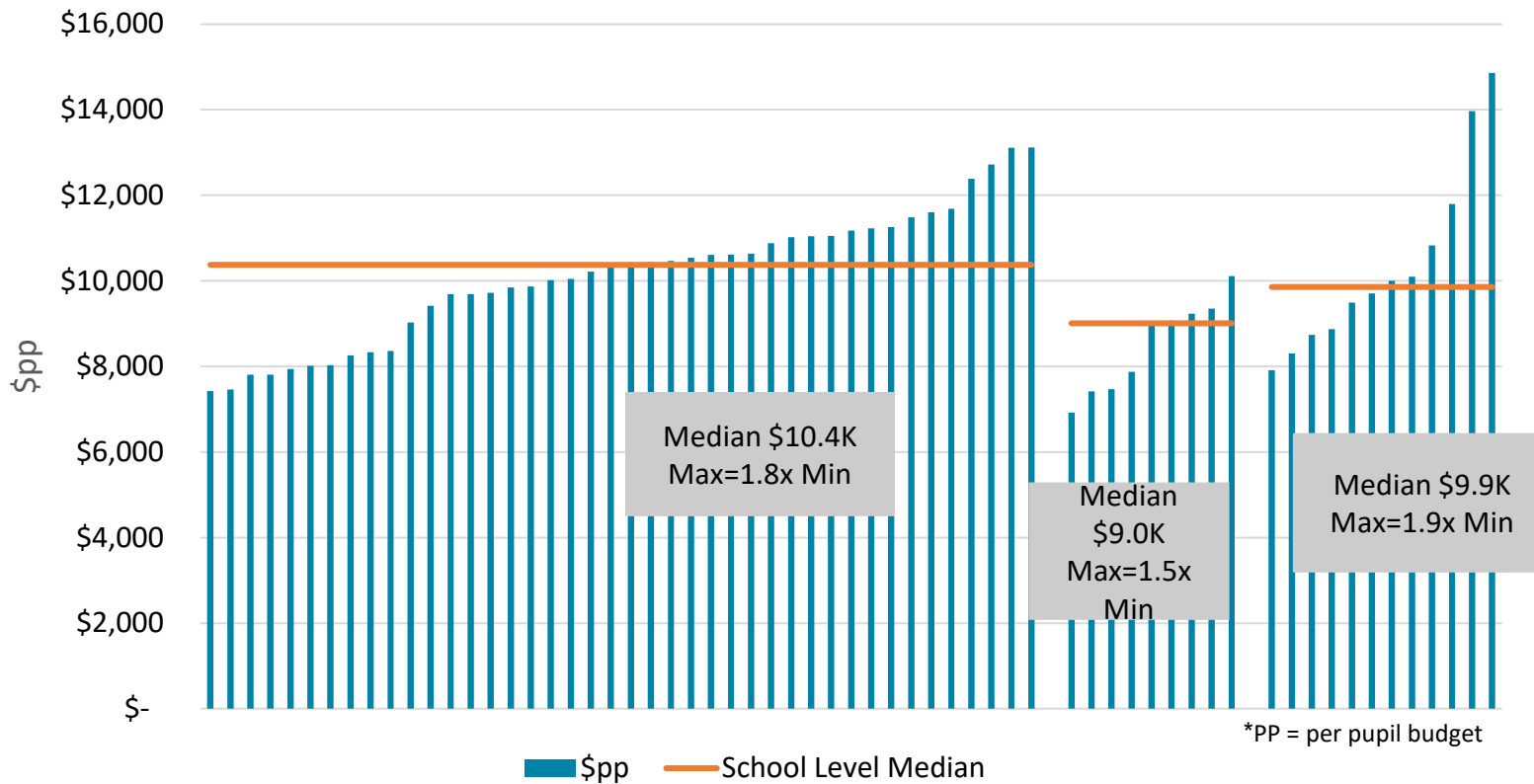
EMPOWERING

- Principals didn’t always know where they had flexibilities and what was restricted
- Adjustments from the allotments were small and incremental; did not lend itself to significant innovations

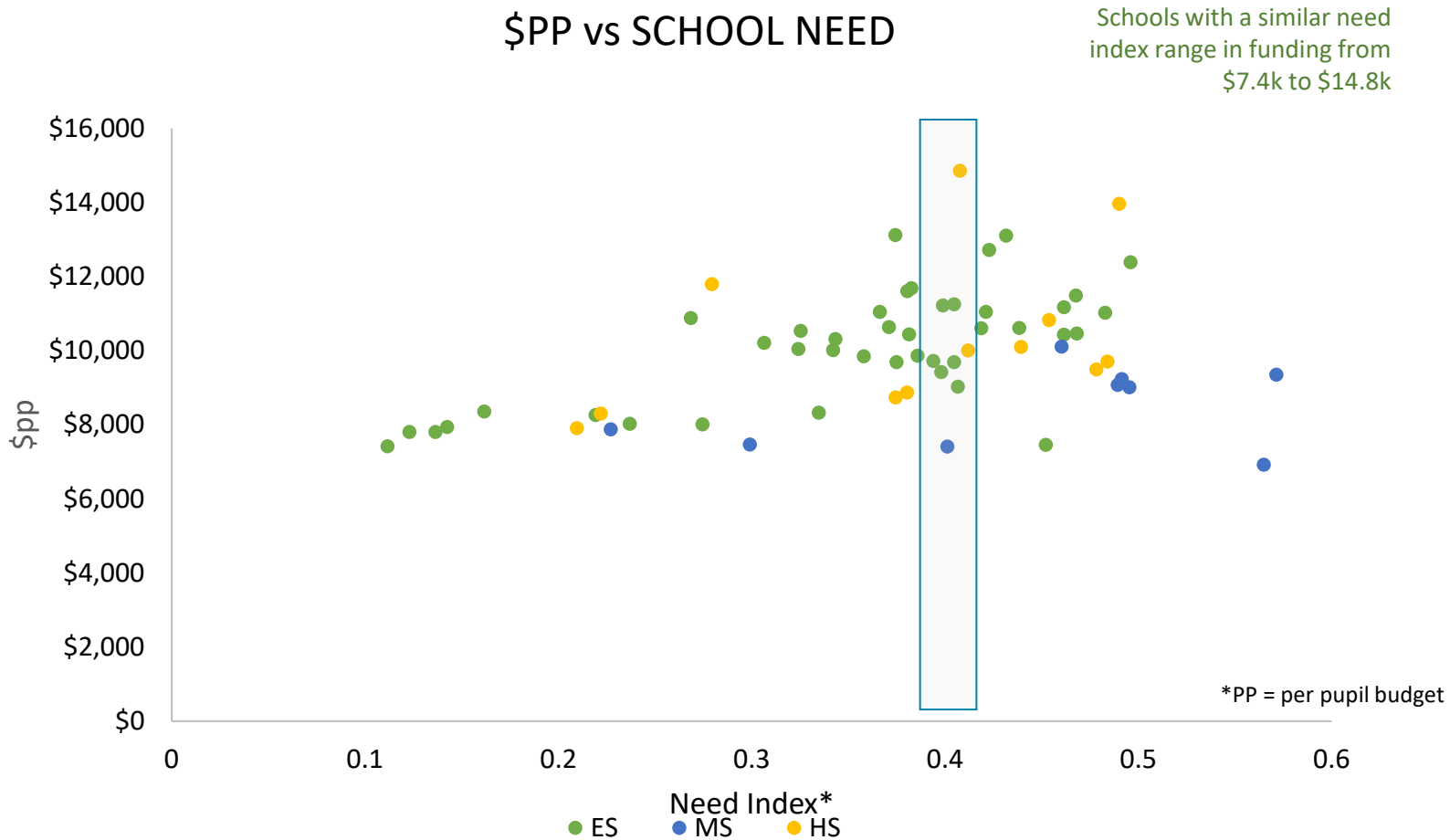


IN THE OLD MODEL: FUNDING LEVELS VARIED ACROSS SCHOOLS

\$pp by school



AND THAT VARIANCE WAS NOT TIGHTLY ALIGNED WITH STUDENT NEEDS



A COMPLETE SSF FORMULA STRIKES A BALANCE BETWEEN EQUITY AND STABILITY

STABILITY STRATEGIES:

- Baseline services ensures all schools are able to provide a minimum level of services
- Transition strategies ensure schools do not see large swings year over year



Equity

Stability



WHY DID MY BUDGET CHANGE???



Changes in “The Pie”



Changes in Enrollment



Changes in The Base



Changes in Demographics



Changes in Other Factors



CHANGES TO THE PIE

Every year, Budget Services recalculates the total amount that will be pushed out through SSF. Then weights are adjusted accordingly.

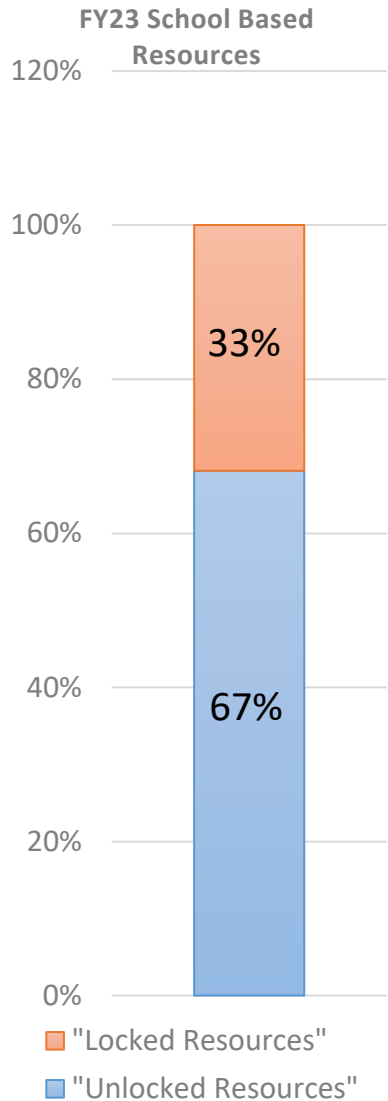
Last year, the initial total amount pushed out through SSF was \$280,476,855
This year it is \$267,302,625
Resulting in a change of -\$13,174,230

CHANGES TO "THE PIE" FOR FY2023 INCLUDE:

Changes in TRS rate, average salaries, and step increase	\$3,150,590
Changes in student enrollment and corresponding weighted FTE	-\$9,776,814
Media Specialist	-\$6,548,006



THIS YEAR, APS UNLOCKED \$267M OF RESOURCES THROUGH SSF and SCHOOLS HAD FLEXIBILITY IN THE USE OF SOME OF THE "LOCKED" RESOURCES



"Unlocked" Resources \$267M	"Locked" Resources \$131M
✓ Core teachers	✓ Signature funds**
✓ Extended core	✓ Turnaround funds**
✓ Principals/APs	✓ Title I funds**
✓ School admin (<i>including clerks, secretary, registrar, and program admin</i>)	✓ Title IV funds**
✓ Gifted	✓ Field Trip Transportation funds
✓ Gen ed paras (<i>Kindergarten</i>)	✓ CTAE positions
✓ Counselors	✓ ESOL positions
✓ EIP/REP teachers	✓ SWD positions
✓ Graduation Coaches	✓ Psychologists
✓ Athletic Directors	✓ Nurses
✓ ISS Monitors	✓ Social Workers
✓ Textbook funds	✓ ROTC
✓ Substitutes	✓ Custodians & Site Managers
✓ Base, flex, cluster, and small school supplement	✓ Instructional Technology Specialists
	✓ Media Specialist
	✓ SROs
	✓ Schools not funded through SSF

***Flexibility within resources exists*



FY23 SSF ALLOCATION OVERVIEW

	Distribution	Description	Amount
EQUITY	Student Weights	Funds distributed throughout ten need base weights:	
		1. Base weight	\$159M
		2. Grade level	\$18.3M
		3. Poverty	\$43.4M
		4. Gifted	\$9.7M
		5. Gifted Supplement	\$1.2M
		6. Incoming Performance	\$1.9M
		7. ELL*	\$1.1M
		8. Special Education*	\$566K
		9. EIP/REP	\$20.3M
10. Concentration of Poverty	\$3.8M		
STABILITY	Small School Supplement	Funds distributed through a weight to supplement smaller schools	\$6.9M
	Baseline Supplement	Supplements provided to schools whose allocation falls below a defined threshold based on the set of resources that a school needs in order to provide basic educational programming	\$807K

* Teaching positions for these programs are allocated to schools outside of the SSF formula



HISTORY OF SSF WEIGHTS

GRADE LEVEL

Grade Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Kindergarten	0.60	0.65	0.60	0.60	0.60
1 st Grade	0.25	0.30	0.25	0.25	0.25
2 nd Grade	0.25	0.30	0.25	0.25	0.25
3 rd Grade	0.25	0.30	0.25	0.25	0.25
4 th Grade		0.10			
5 th Grade		0.10			
6 th Grade	0.05	0.05	0.05	0.03	0.03
7 th Grade			0.02		
8 th Grade			0.02		
9 th Grade	0.05	0.05	0.02	0.03	0.03
10 th Grade			0.02		
11 th Grade			0.02		
12 th Grade			0.02		

PRIOR ACADEMIC PERFORMANCE

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.	0.10	0.10	0.10	0.10	0.10
Middle	0.10	0.10	0.10	0.10	0.10
High	0.05	0.05	0.05	0.05	0.05

POVERTY

CONCENTRATION OF POVERTY

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.	0.50	0.55	0.50	0.50	0.50
Middle	0.45	0.50	0.50	0.50	0.50
High	0.60	0.55	0.50	0.50	0.50

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.			0.06	0.06	0.06
Middle			0.06	0.06	0.06
High			0.06	0.06	0.06



HISTORY OF SSF WEIGHTS

SPECIAL EDUCATION

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.	0.03	0.03	0.03	0.03	0.03
Middle	0.03	0.03	0.03	0.03	0.03
High	0.03	0.03	0.03	0.03	0.03

ENGLISH LANGUAGE LEARNERS

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.	0.10	0.15	0.15	0.15	0.15
Middle	0.10	0.15	0.15	0.15	0.15
High	0.10	0.15	0.15	0.15	0.15

GIFTED EDUCATION

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.	0.60	0.60	0.60	0.60	0.60
Middle	0.60	0.60	0.60	0.60	0.60
High	0.60	0.50	0.50	0.50	0.50

GIFTED SUPPLEMENT

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.	0.60	0.60	0.60	0.60	0.60
Middle	0.60	0.60	0.60	0.60	0.60
High	0.60	0.50	0.50	0.50	0.50

SMALL SCHOOLS

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.-450	0.40	0.40	0.40	0.40	0.40
Middle-550	0.40	0.40	0.40	0.40	0.40
High-650	0.40	0.40	0.40	0.40	0.40

Early Intervention (EIP) and Remedial Education Programs (REP)

School Level	FY19 Weight	FY20 Weight	FY21 Weight	FY22 Weight	FY23 Weight
Elem.		1.05	1.05	1.05	1.05
Middle		1.05	1.05	1.05	1.05
High		1.05	1.05	1.05	1.05



CHANGES IN ENROLLMENT AND BASE

- Changes in enrollment are typically the most impactful change in your allocation from one year to the next. For FY2023, student enrollment has decreased.
 - If your budget has a LARGE surplus or deficit, the FIRST thing you should do is revisit enrollment. If there are big swings at your school, check your class-size and adjust your staffing as appropriate.
 - Almost ALL schools can be balanced by simply aligning staff to their current year's enrollment projection
- The base allocation for SSF will adjust each year to account for changes in average salaries, increases in compensation, and changes in benefit costs. To calculate the change in your allocation that can be attributed to changes in the base, multiply your current enrollment by both last years and this year's base allocation



BASELINE SERVICES

Positions

- Principal
- Assistant Principal
- School Secretary
- Counselor
- School Clerk
- ISS Monitor (1.0 MS/HS)
- Registrar (1.0 HS)
- Graduation Coach (1.0 HS)
- Flex Teacher (1.0 ES/MS, 1.5 HS)

Teacher Grade Level	Student: Teacher Ratio
K-3	21
4-5	23
6-8	24
9-12	25

Resource Type	\$ per School
Cluster	\$35,000

Resource Type	\$ per Pupil Elementary	\$ per Pupil Middle	\$ per Pupil High
Supplies & Materials	\$101	\$96	\$129
Substitutes	\$120	\$120	\$120
Additional Flex	\$40	\$40	\$40
Textbooks (Replenishments)	\$53	\$53	\$53



CHANGES IN ALLOCATIONS OUTSIDE OF SSF

Certain positions are allocated to schools by program managers and must be allocated as earned. Changes in these position allocations can impact your overall budget allocation but may not impact your "purchasing power". These allocations include Special Ed (teachers and paras), ESOL Teachers, CTE Teachers, ROTC, Custodians, Site managers, Operations Managers, Resource Officers, Nurses and Psychologists. Funds for the Media Specialist position are not included in the SSF formula for FY23. Instead, schools will earn an FTE allocation from the program manager and must be allocated as earned. **Signature programs updated the funding formula for FY2023.**

Other allocations on top of SSF can also change your overall budget:

	FY2022	FY2023	Change
Signature	\$100,000	\$136,100	\$36,100
Turnaround	\$684,261	\$684,261	\$0
Title I	\$496,260	\$549,079	\$52,819
Title I School Improvement	\$75,000	\$0	-\$75,000
Title IV	\$90,981	\$95,700	\$4,719
Title I Family Engagement	\$0	\$15,000	\$15,000
Field Trip Transportation	\$25,806	\$22,677	-\$3,129
Dual Campus Supplement	\$0	\$0	\$0
District Funded Stipends	\$45,003	\$48,503	\$3,500
Total	\$1,517,311	\$1,551,320	-\$34,009



TRANSITION STRATEGY

- A transition strategy ensures schools do not see large swings year over year (not subject to changes in enrollment) and creates a temporary cap on what percentage of per pupil funding a school can lose or gain in one year. Transition policy was implemented only when moving to SSF. Currently, there are no hold-harmless mechanism in the formula.
- Other strategies to offset losses included leveraging foundations, the Partnerships Office, special revenue and grant opportunities, etc. We also allowed schools to carryover up to 20% (a range from \$0 to \$104,247) of their unused non-personnel allocations from the previous year to offset future year losses or to accrue funds.



WRAP UP AND NEXT STEPS

NEXT SSF TASKFORCE MEETING:



Tentative Agenda:
Stability and Equity

Internal Taskforce:
October 19, 2022
2:00pm-4:00pm

**BFAC/External
Taskforce:**
October 20, 2022
6:00pm-8:00pm

