

2017-2018: Sequence of Events for Flexible Allocation Budget Process

Timeframe	Event
October 2016	The Budget Request Process team (Planning and Evaluation and Finance) recommended that the Superintendent and Cabinet identify priority areas so that cost center heads could determine whether to submit a request and tailor requests to these priorities.
End-of November 2016	Finance was tasked with asking cost center heads to estimate any projected funding needs with no restrictions on requests.
Early December 2016	Supervisors reviewed budget requests and gave some initial feedback to cost center heads on how to modify those asks.
Mid-December 2016	The Budget Request Process team provided training for cost center heads based on the recommended process and provided guidance on how to make submissions.
End-of January 2017	Cost center heads submitted budget requests. No priorities were set in advance of the opening of this process by the Superintendent and Cabinet.
Mid-February 2017	The Budget Request Process team began to review submitted requests to identify common areas of need. This review process was based on an established scoring rubric focused on alignment with Vision 2020, demonstrated need, and clarity in objectives and planning.
End-of February 2017	Before the Budget Request Process team completed their review, the Superintendent convened Cabinet and Assistant Superintendents to identify broad priority areas of need.
Early March 2017	The Budget Request Process team shifted their focus from reviewing most submitted requests to reviewing only high cost items aligned with the three broad areas of need. Reviewers still followed the scoring rubric and also considered evidence of previous program efficacy (for existing programs). In addition, Planning and Evaluation staff examined the submissions from an equity lens (e.g., priority vs non-priority schools; other programs already in place at schools). These analyses were shared with the Superintendent to inform Cabinet's review and selection of requested funds.
Mid-March 2017	The Superintendent ultimately decided to divide the flexible funds between school-initiated programs and district-initiated programs with a greater proportion of funds directed to district programs. Additionally, Academics received a larger portion of the overall allocation with most funds directed to schools. Cabinet members and Assistant Superintendents then were asked to prioritize submissions made by their cost center heads within that allocated amount. The three areas of need identified by Cabinet did guide some of these selections.
Late March 2017	Final award decisions were communicated to cost center heads.
Mid-April	The Board received notification of the final list of selected funding requests.
Late March 2017	Due to the change in review process, Planning and Evaluation recommended conducting a final review of selected submissions to identify any proposals with significant misalignment between their goals and targets or between their requested staffing and students served (i.e., unreasonable number of students served by a single staff member). As a result, cost center heads were required to adjust these points of misalignment in their proposals before funds were released for their selected proposals.