



General Fund Budget Development Process

Agenda

Review the Budget Development Process
Identify Concerns with the Current Process
Alignment to Goals and Priorities

Budget Development Process/Timeline

- September – State releases the annual Act 1 Index
- November – Official Enrollment published
- December/January – Enrollments Projections published and reviewed
- January – Principals receive Site-Based Budgets
- February/March – Governor’s Budget Proposal
- March – Site-Based Budgets provided to HR for staffing
- June – Deadline to certify not to increase taxes beyond index
- June – State Budget approved
- June – August – Departmental Budgets entered
- September – October – Department Budgets reviewed and finalized
- November – Release of Preliminary General Fund Budget
- December – Approval of the Final General Fund Budget

Budget Development Process/Timeline

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.
•State Act 1 Index Timeline	Yellow															
•Official Enrollment Published			Orange													
•Enrollments Projections Published, Reviewed, and Finalized				Orange												
•Site-Based Budget Process					Green											
•State Budget Process						Yellow										
•Departmental Budget Process											Green					
•General Fund Budget Release and Approval															Yellow	

Budget Workshops

- Adopted February 26, 2020 via Board Resolution
 - The Board authorizes that Board Operational Guideline 004 BOG 1 of 1 – Role of the Board of Public Education be amended to require that no less than three (3) Budget Planning Workshops be held as a Committee of the Whole to assist the Board in its duties to approve an annual budget.
 - That the Budget Planning Workshops described herein shall be scheduled by the Board President in consultation with the Superintendent.
 - That the agenda for each Budget Planning Workshop shall be created by the Business Finance Committee in collaboration with Administration.

Concerns with the Current Process

- What do you dislike about the current budget development process?
- What are some areas where the current process can be improved?
- What is your ideal outcome for the budget process?

Concerns with the Current Process

- What do you dislike about the current budget development process?
- What are some areas where the current process can be improved?
- What is your ideal outcome for the budget process?

<https://forms.office.com/r/LiciLsrKxH>



Performance Priorities

- At the November 19, 2022, Board Retreat, the Board of Directors approved the Performance Priorities set for the Superintendent:
 1. Invest in culturally responsive, evidence-based training, tools, and instructional practices.
 2. Construct safety, health, and wellness protocols.
 3. Expand stakeholder communication and partnerships.
 4. Design effective organizational systems.
 5. **Strategically allocate resources to ensure equity, excellence, and efficiency.**

These five priority goals articulate key strategies to improve Culture, Systems, and Instruction in the Pittsburgh Public Schools.

- Additional student outcome goals for math, literacy, science, college and career, career and technical education, graduation and suspension ratios have been articulated and disaggregated to close racial and special education disparities.

Performance Priority 5 - Strategically allocate resources to ensure equity, excellence, and efficiency.

- **Context:** Every child living within Pittsburgh Public Schools' footprint is entitled to a high-quality and robust educational experience, regardless of race, zip code, gender (including gender identity or expression), disability, sexual orientation, ethnicity, and economic designation. Therefore, our schools must strategically allocate resources and become vibrant community hubs that demonstrate fiscal responsibility through efficient operations while maintaining safe, effective, modern learning environments. Additionally, Pittsburgh Public Schools is committed to eliminating racial achievement disparities by investing in research, curriculum, assessment, data analysis, and accountability constructs that are culturally responsive and prioritize student needs and outcomes. To actualize this desire, we must utilize an equity lens of access, support, and services to drive decisions that impact student learning experiences and outcomes informed by data. Understanding that our mission is rooted in creating community, we embrace consistent collaboration, partnerships, and relationships with key stakeholders, inclusive of the most marginalized, to create optimal student learning experiences.

Performance Priority 5 - Strategically allocate resources to ensure equity, excellence, and efficiency.

- **Action Steps:**

- 1. Formalize and communicate definitions of equity, excellence, and efficiency in the Pittsburgh Public Schools.
- **2. Evaluate and assess how financial resources are currently allocated in ways that ensure equity, excellence, and efficiency.**
- **3. Investigate exemplar resources allocation models that advance equity, excellence, and efficiency.**
- **4. Work collaboratively with the Board of Directors and Leadership Team to create design principles that inform the strategic allocation and optimization of resources (human, financial, physical plant, infrastructure, instructional, etc.) to ensure equity, excellence, and efficiency.**
- 5. Create an informational resource outlining the potential impact of resource allocation rooted in equity, excellence, and efficiency to support the improvement of student experiences and outcomes.
- 6. Create and expand opportunities for stakeholder feedback regarding needed resources to ensure equity, excellence, and efficiency.
- 7. Design collaborative stakeholder teams to create core recommendations that begin the journey of addressing strategic allocation of resources to ensure equity, excellence, and efficiency.

Comprehensive Plan

- Approved by the Board on December 21, 2022
- Include a measurable goal of create a “New District Funding Model”
- Based on the comprehensive plan, the anticipated start date for this work is 1/16/2023 with and an anticipated completion date of 7/22/2025.

New District Funding Model

Action Plan for: Two Way Stakeholder Engagement						
Measurable Goals		Anticipated Output			Monitoring/Evaluation (People, Frequency, and Method)	
• New District Funding Model		New District Funding Model, Improved School Design			Quarterly	
Action Step	Anticipated Start Date	Anticipated Completion Date	Lead Person/Position	Material/Resources/Supports Needed	PD Step?	Com Step?
Create Design Principles. (Design Principles are value statements that frame decisions and support consistency across teams working on the same product or service.)	01/16/2023	05/30/2023	Superintendent of Schools	Leadership Team, School Board, Student and Parent Advisory, Consultant Support	Yes	Yes
Get Board Approval on the Initial Design Principals.	03/31/2023	06/30/2023	Superintendent of Schools	School Board	No	Yes
Design Two-Way Communication Engagement Channels	03/31/2023	05/31/2023	Chief of Staff	Consultant Support, Leadership Team	No	Yes
Gather Stakeholder Feedback on the Design Principles	06/01/2023	09/29/2023	Superintendent of Schools	Meetings, Engagement Tools	No	Yes
Modify Design Principles based on Feedback and Apply New Principles to the District Budgets (including General, Capital, and Supplemental).	08/03/2023	10/30/2023	Chief Financial Officer	other data points per the design principles	No	No
Share Implication of Design Principle results with Stakeholders	11/01/2023	12/30/2023	Superintendent of Schools	Results	No	Yes
Seek Board Feedback Approval and Begin Implementation of Results	01/09/2024	07/22/2025	Superintendent of Schools	Transparent and Robust Communication Plan, School Board, Leadership Team, Implementation Consultant Support	No	Yes

Next Steps

- Proposed Next Steps
 - Evaluate and assess how financial resources are currently allocated in ways that ensure equity, excellence, and efficiency.
 - Investigate exemplar resources allocation models that advance equity, excellence, and efficiency.
 - Work collaboratively with the Board of Directors and Leadership Team to create design principles that inform the strategic allocation and optimization of resources (human, financial, physical plant, infrastructure, instructional, etc.) to ensure equity, excellence, and efficiency.