



Boston Public Schools

Reimagine School Funding Project

2023



Final Report & Recommendations

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I. Introduction

ReImagine School Funding Project Overview

Boston Public Schools annually allocates over \$650 million dollars to school budgets. Since 2012, the main method of allocation has been through Weighted Student Funding (WSF), a formula that factors in each school's projected enrollment and the levels of need for each projected student, for the 2021-22 school year the total was \$524M. This formula has been continuously reviewed and updated over the years. With enrollment decline a stark reality in our district, and a phenomenon affecting different schools and student groups unequally, we are concerned that the current WSF model may not be equitably distributing resources in the way we'd intended. In addition, approximately \$150 million dollars are allocated to schools through means besides WSF.

The ReImagine School Funding Project (RSF) is a BPS initiative that seeks to equitably develop an updated school funding policy through authentic collaboration with community stakeholders.

This 18+ month process was designed to bring student, family, community, and school leader voices to the center of the funding redesign process so BPS can rethink together how our funding policy can better serve BPS students, and support BPS schools with a focus on those BPS students and families who have been historically most marginalized and left out of funding decisions.

Why Now?

The ReImagine School Funding work is the foundation that will advance our other initiatives. BPS faces two sustainability challenges in 1) the end of ESSER¹ Federal funding and 2) sustaining the "hold harmless" strategy for schools experiencing declining enrollment since the pandemic. It is essential to do this now alongside the other comprehensive changes, such as the district wide expansion of Inclusive education environments and new multilingual learner programming. BPS is working towards better serving students and the RSF project is a critical part of the work as funding is connected to everything else. It is an integral part of the system and the way we fund our students and our schools is what allows these other initiatives to be successful.

Project Goals

The goal of RSF was to redesign the funding policy to more equitably support each child to achieve and thrive with a focus on BPS students and families that have been historically marginalized. A successful reimagined funding policy will:

Provide more equitable support for each child to achieve and thrive with a focus on BPS students and families that have been historically marginalized.

Be clearly articulated and well-understood across our constituents.

Make explicit connections to other aspects of resource equity beyond the funding allocation that merit further review.

1

ESSER refers to the Federal [Elementary and Secondary School Emergency Relief Funds](#) from the Covid-19 pandemic



Components of the Funding Policy

The RSF project developed three components to the new funding policy that will collectively serve to bring a greater level of transparency, clarity, and equity to the budgeting process.

- Transparent “**Funding Allocations**” set clear methodologies for position or funding allocations, so schools will better understand their budget allocations.
- The “**Funding Use Policy**” will also specify, for each specific allocation, the degree of flexibility for any intended fund. Allocated funding will therefore reach its intended goal and/or work within the guidelines of any set allocation.
- Lastly, the “**Budgeting Process**” seeks to redesign a budget season sequence that increases community engagement and authentic collaboration that will support school leaders in building successful school teams.

Together these components are critical aspects to implementing a funding policy that will meet our goal.



Funding Allocations

Funding priorities
Calculation methodologies
(The “formula”)



Funding Use Policy

Flexibilities to promote strategic resource use
Essentials to ensure necessary supports



Budgeting Process

Opportunity for School Community Engagement
District/School Collaboration



II. ReImagine School Funding Process

Community at the Helm

From the outset, the project team put community voice at the center of this project. The design of the RSF project has therefore put those most impacted by the new funding policy - students, community members, and schools - at the core of the work with the purpose of working collaboratively to develop the new funding priorities and funding policy recommendations.

The RSF project structure elevates the “Steering Committee” as the central and driving voice behind the funding policy recommendations. RSF established four groups to complete this work but have elevated the “Steering Committee” as the main recommendation making group that developed this proposal.

Additionally, this project’s structure intended to disrupt and subvert traditional hierarchies and decision making roles and truly center community voice throughout the process. In considering the [BPS Racial Equity Planning Tool](#) Spectrum of Community Engagement (see below) we aim for the community-led Steering Committee to operate primarily in the spaces of empowerment while also collaborating with all other working groups (Principals, Funding Policy Design, Engagement and Communications) to collectively share perspectives, data, impact, ideas, and redesign and reimagine a more equitable school funding system together.

INCREASING IMPACT ON THE DECISION

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

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Working Group Design

The working group structure (see image below) was designed to bring together community, school, and district leaders to approach this work from their unique perspectives through four working groups. The purpose and goals for each are critical to successfully designing and implementing an updated funding policy. Included below is a description of each working group, along with their charge for the RSF project:



Steering Committee: This is a group of BPS community members engaged as critical stakeholders in the BPS Reimagine School Funding Project. This group is made up of 12 individuals. There are two students from the Boston Student Advisory Committee (BSAC), three parents of students with disabilities representing SPEDPAC, three community members representing the District English Learner Advisory Committee (DELAC), one parent leader of the Citywide Parent Council (CPC), one OAG Taskforce representative, and two advocates from the English Language Learners (ELL) Task force.

This group is empowered to make a recommendation for the new BPS school funding policy to the Superintendent that is representative of community voice and desired community outcomes for BPS students. The Reimagine School Funding Project amplifies the voice and perspective of the Steering Committee through intentionally designed working group meetings. The Steering Committee met separately from the other working groups for the first few meetings (Dec-March). This structure made sure that their voice did not get pushed aside by central office employees and school leaders. Steering committee requested specific data sets, gave feedback on nascent policy proposals, and advocated for the needs of their specific communities.



Principals Working Group: This is a group of key internal stakeholders brought together to offer insight and expertise on the funding policy from the perspective of their respective schools. The school leaders are also key stakeholders in gathering input and perspective from their peers. One of the first activities that this working group completed was a peer interview process. They were specifically tasked with interviewing a school leader from a school with a completely different context than theirs. This activity exemplifies the critical role that school leaders play in sharing insight and recommendations for funding policy and process.

There are 12 administrators in the principals' group and they represent multiple school types that navigate the BPS funding systems in their own unique ways. In this working group, there are administrators from transformation schools (1), K-8 schools (2), elementary schools (7), and high schools (2). There was intentionality in bringing together administrators that represent very different schools in the district by racial demographic, geographic location, and school type.

Funding Policy Design: FPD members are key internal stakeholders that bring a passion and enthusiasm for disrupting historical inequities. They bring incredibly valuable perspectives about the history of this work and an expertise in the goals that are critical to reimagining a new funding policy, product, and process. On top of bringing expertise, this group is creative, solutions-oriented, and collaborative with the Steering Committee and Principal Working Group.

This group consists of 18 individuals. They include representatives from the following departments: Finance, Inclusion, Special Education, Academic Superintendents, and ESSER.

Engagement and Communications Group: This is a group of key internal stakeholders that provide guidance and direction on the engagement methodologies used in this project (e.g., communication channels, protocols, engagement groups, messaging, and timing). They provide expertise on connecting with BPS community members, families, and other stakeholders, supporting access via translation services, designing approaches and engagement events for historically marginalized groups. Provide feedback on the decisions/deliverables of all working groups connected to the BPS Reimagine School Funding Project.

Please visit the [Boston Public School's Reimagine School Funding Project website](#) for additional details on meeting schedules, objectives and materials.

REPT Process

The BPS Racial Equity Planning Tool (REPT) lays out a clear six-step process to operationalize BPS's commitment to ensure each decision made is aimed at closing opportunity gaps and advancing racial equity. The toolkit presents resources to guide the development, implementation and evaluation of significant policies, initiatives, programs, professional development, instructional practices and budget decisions.

The RSF project utilized the REPT process and updated it twice throughout the course of the project. The [REPT documentation](#) for the RSF project can be found here.



Engagement Process

In Summer/Fall 2022, the consultant team conducted an initial set of 50 interviews with BPS community stakeholders (e.g., families, central office stakeholders, and school), a survey of over 250 community members, as well as an analysis of the official notes taken at BPS ESSER Listening Series, Community Equity Roundtable (CERT) Meetings, and School Committees Meetings provided to the Afton and UPD consulting teams by BPS staff in order to build on the history and context that BPS community members and staff were working from.

Additionally, the RSF project held monthly meetings with each working group from November 2022-June 2023 and 1-on-1 meetings with members of each working group in March/April 2023. These meetings have been instrumental in shaping policy proposals and iterating on previous drafts. The consultant team keeps notes and takeaways from each engagement and several members of the Steering Committee, especially those from SPEDPAC, have demonstrated their increased impact on the project decisions by requesting data, additional 1-on-1 meetings, and prompting feedback even outside of structured working group meetings.

In April 2023, the Relmagine School Funding team also conducted focus group conversations with stakeholders from the Transformation Schools department, Citywide Parent Council (CPC), BSAC, SPEDPAC, and a student group from the Hernandez Dual Language K-8 school. These additional conversations have served an important purpose of getting the word out about the Relmagine School Funding project, surfacing individual stories, and recommendations on new policies.

In order to move forward, the final policy proposals will receive a formal recommendation from the Steering Committee members. Once approved and recommended by the Steering Committee (in the summer/fall of 2023) the consultant team will engage CPC, BSAC, SPEDPAC, and DELAC to present final policy proposals.

The Relmagine School Funding project impacts all stakeholders within Boston Public Schools - students, families, educators, and central office staff. Funding policy, in combination with several other dimensions of resource equity, determine the quality of a child's education.

The steering committee is made up of students, parents, and advocates representing some of the most marginalized communities in BPS. Their voice and impact on the school funding decisions disrupts a history of informing these communities about major decisions after decisions have already been made. The principals working group is probably the stakeholder group most impacted by the budget process. Their voice is instrumental in the realities of implementation, especially for schools that have high-needs populations. The Engagement and Communications Group has supported the project with translation, engagement with community groups, and including voices that are often overlooked when districts embark on a new initiative.



Families: We have learned that it is an imperative for BPS to include Parents & Students in School-level Funding Decisions. BPS has made strides in creating systems for parents to follow and provide input on school-level budgeting activities, the set up of school site and parent councils does limit access to participation – this is primarily because school site councils are elected officials and parent site councils meet at inopportune times for groups that have historically been left out of school-level budgeting decisions (e.g., working families, single parents, homeless families). While on paper BPS does have a system of equity roundtables that are open to all parents, the set up, utility, and quality of these forums varies greatly across the district.

School Leaders: The annual budgeting process, in combination with time constraints limits BPS' ability to offer uniform quality across schools. School leaders need more resources, staff, and professional development to help make updates to initial budgeting estimates, navigate central office bureaucracy, and involve parents' input into their funding decisions due to lack of internal capacity at the school-level.

Multilingual Learners: The funding policy does not allocate enough funding to meet the diverse needs of BPS' English language learners student population. BPS' funding policies do not allocate enough funding to meet its compliance standards with the U.S. Department of Justice or US Department of Education. Multilingual Learners have a diverse set of linguistic needs, and a one-size-fits-all approach is not satisfactory to meet the district's stated priorities or ESSER listening tour requests from students and parents. Although additional funding is allocated through BPS' Opportunity Index to economically disadvantaged schools, these funds are limited to activities related to partnership & contracts and do not supply school leaders with the necessary budget to meet BPS' demand for Multilingual Learner educators or services.

Special Education: Students with Disabilities have different needs. BPS' funding system (particularly WSF) does not account for the wide range of support needed for students with similar conditions. Staffing decisions happen before students have their Individualized Education Plan (IEP) meetings - which are opportunities for BPS Special Education staff, school leaders, educators, school support staff, and families to learn about a student's condition/disability and create a strategy that supports their learning needs.

At times, there is misalignment between the projected level of needs at a school level and the final students' IEP level of need. In order to adjust for this gap, the Strategic Enrollment Action Team (SEAT) process reviews enrollment/staffing issues on an ongoing basis throughout the year for schools where the budgeted school level teams are unable to match the needs of the students at the school site. This adjustment of the school level staffing attempts to resolve the unforeseen factors that occur after the budget process and attempts to prevent any gap in support for the student.



III. Current Context

Current Context and Outcomes

For more than a decade, Boston Public Schools has used a Weighted Student Funding (WSF) model (also referred to as student based budgeting) to determine the school level funding allocations. This strategy is based on projected enrollment that accounts for the needs of individual students in specific categories.

BPS launched this project as a part of our [2020-2025 strategic plan](#), which had a commitment to Expand Opportunity by creating fair and equitable funding and welcoming environments. This has specific goals including 4.1) Fund all schools in a manner that meets the unique needs of the students they serve, with consideration given to English Learners, students with disabilities, economically disadvantaged students, students at risk of dropping out, off-track youth and other historically marginalized groups, and 4.2) Improve funding formulas and create mechanisms to ensure equitable distribution of resources generated through fundraising, partnerships, and grants. In addition, two more recent events have pushed BPS to implement revisions to school funding policy: 1) the end of ESSER Federal funding and 2) sustaining the “hold harmless” strategy for schools experiencing declining enrollment since the pandemic.

The needs of BPS students, families, and schools look different than it did ten years ago. BPS must adapt in order to support these changes. To that end, BPS launched this project to reevaluate and rethink how it funds schools. The aim is to ensure that the funding system developed reflects the priorities of students and families, equitably supports the unique programming at schools, and ensures a “quality guarantee” at all schools.

The WSF approach to determining school level funding decisions is closely tied to school enrollment. As the district experiences persistent enrollment declines, a funding system that rewards student enrollment may no longer be able to create the desired conditions. Rather than encouraging successful academic outcomes for all of our students, WSF may be perpetuating some of the inequity in the district that WSF initially sought to disrupt.

Boston Public Schools must move with intention and urgency to confront the core challenges that prevent our students from reaching academic success.

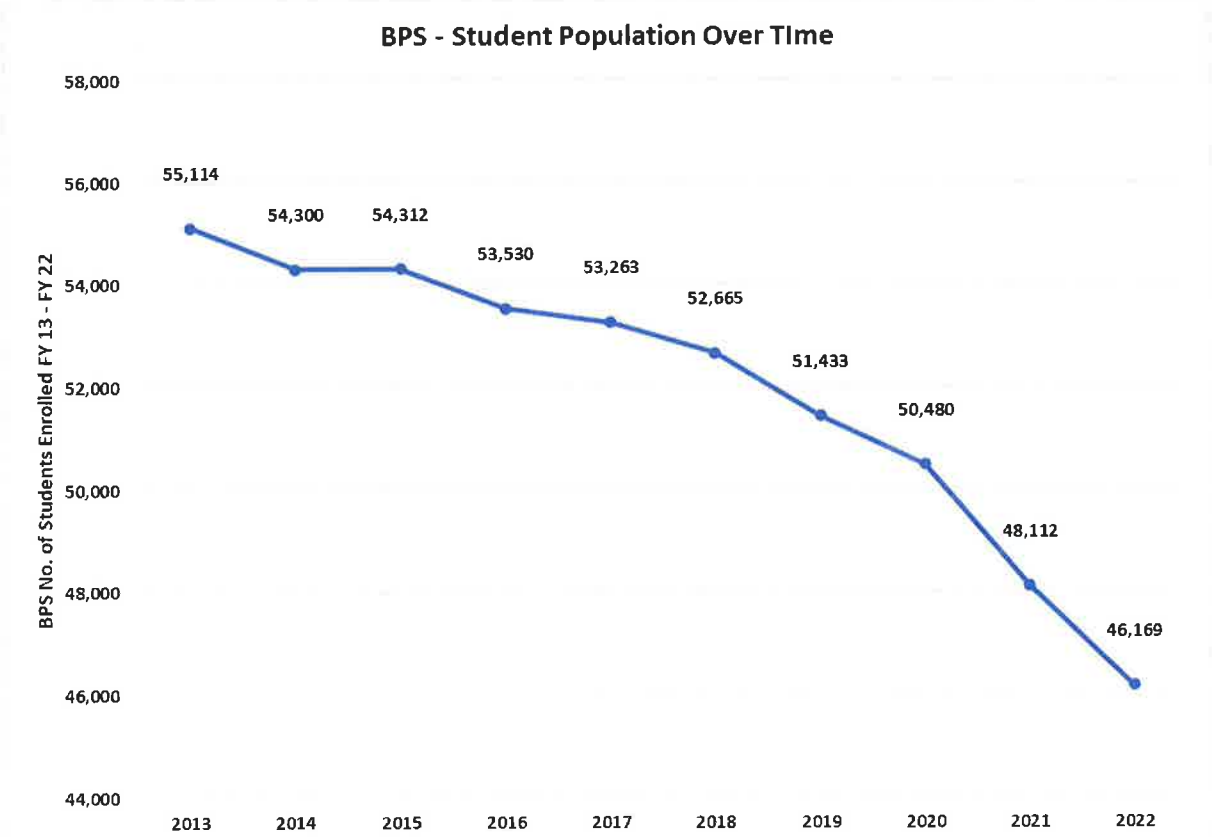
To measure the success of this work through student outcomes, we must acknowledge and overcome the challenges that hinder progress of our Theory of Action:

*IF we give every student what they need, earn the trust and true partnership of families, community members, and stakeholders through authentic engagement and shared leadership, deliver excellent service to students and families, and provide educators and staff with professional development and clear expectations... **THEN we will become a high-performing, nation-leading district that closes gaps and improves life outcomes for each student.***

As BPS assesses the opportunity and achievement gaps that persist across our schools, and particularly across different racial groups, it needs to be clear about the ultimate goal of the work. This funding model project is aimed to improve student outcomes.

OVERALL POPULATION

BPS student enrollment declined over the past decade. Since SY2012-2013, BPS enrollment has dropped by 16.2% (or 8,945 students).

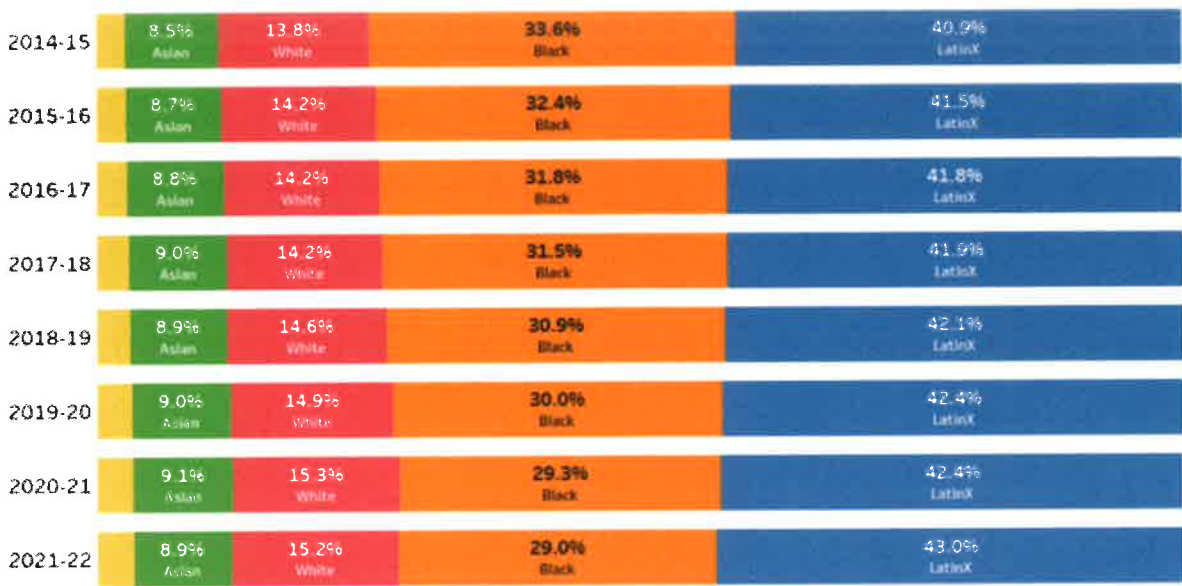


Enrollment of students of all racial backgrounds declined during this period. However, Black students have seen disproportionately higher rates of exit from the BPS system than other racial groups.

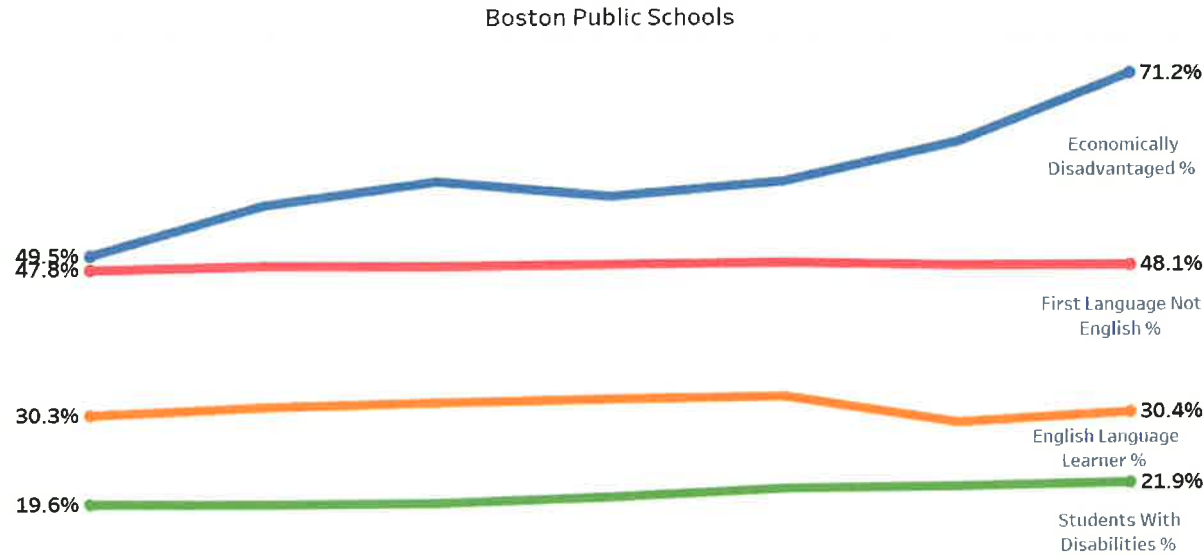
	Other/Mixed Race	Asian	White	Black	Latinx
Rate of <u>exiting</u> BPS since 2015	6.3%	-11%	-6.4%	-26.6%	-10.6%

Since SY2014-2015, the concentration of Latinx students in BPS has increased by about 2.1%, while the concentration of Black students has decreased by 4.6%. This makes sense, as the rate of Black students entering the system declined, the proportion of other racial groups increased as part of the whole.

Student needs have shifted over time, and the proportion of BPS students requiring specialized supports is rising. In addition, the concentration of economically disadvantaged students has increased by 43.8% over the last seven years.



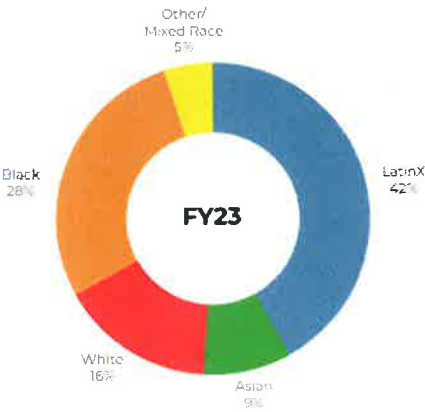
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BPS’s 46,169 students today are majority students of color. Three of every four students are considered economically disadvantaged, two of every four students do not speak English as their first language, and one of every five students has a disability. The baseline of what the BPS student population needs is higher than traditional district “general education” students.



Race/Ethnicity



Student Need

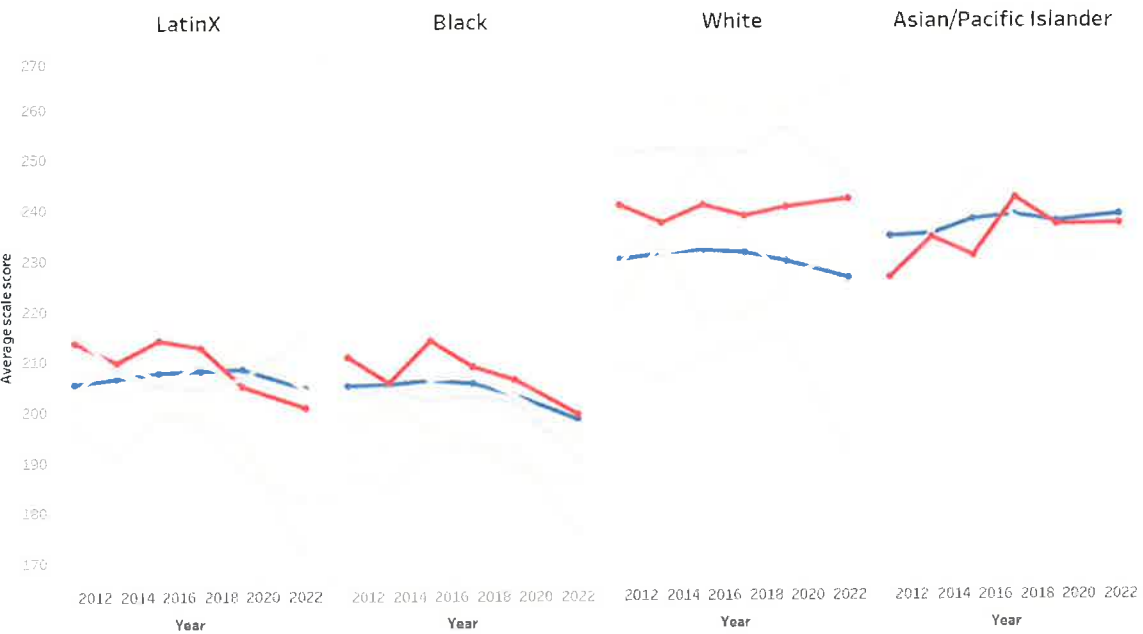


STUDENT OUTCOMES

Inequities in student outcomes by race/ethnicity are significant and growing. This takeaway is consistent across multiple data sources.

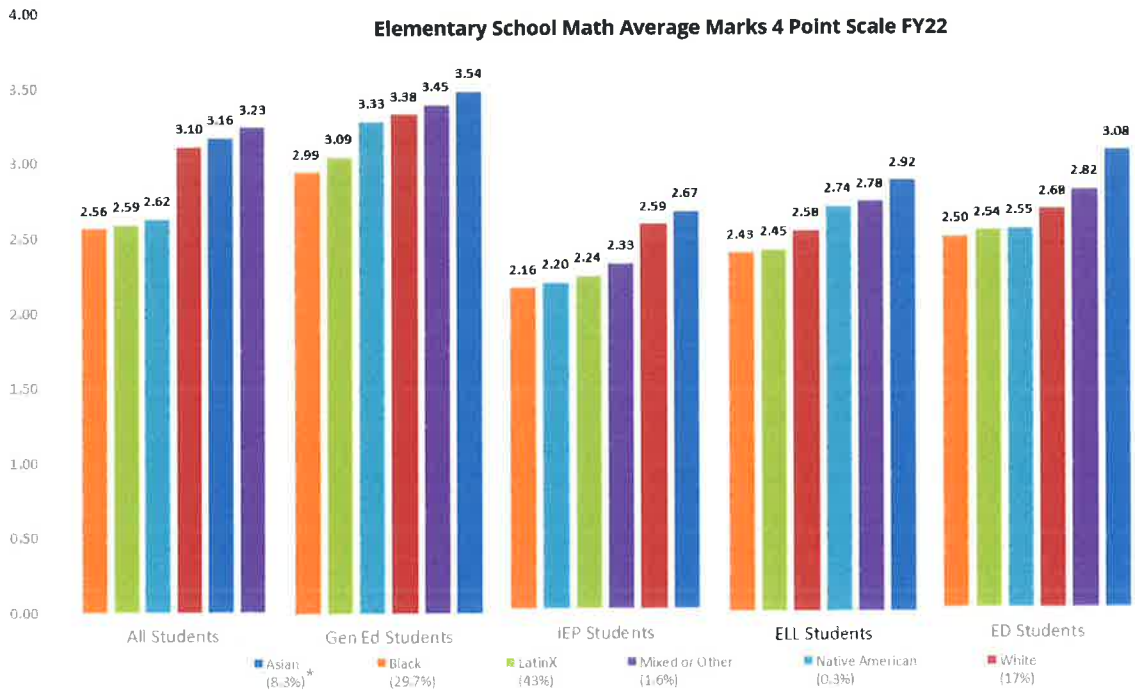
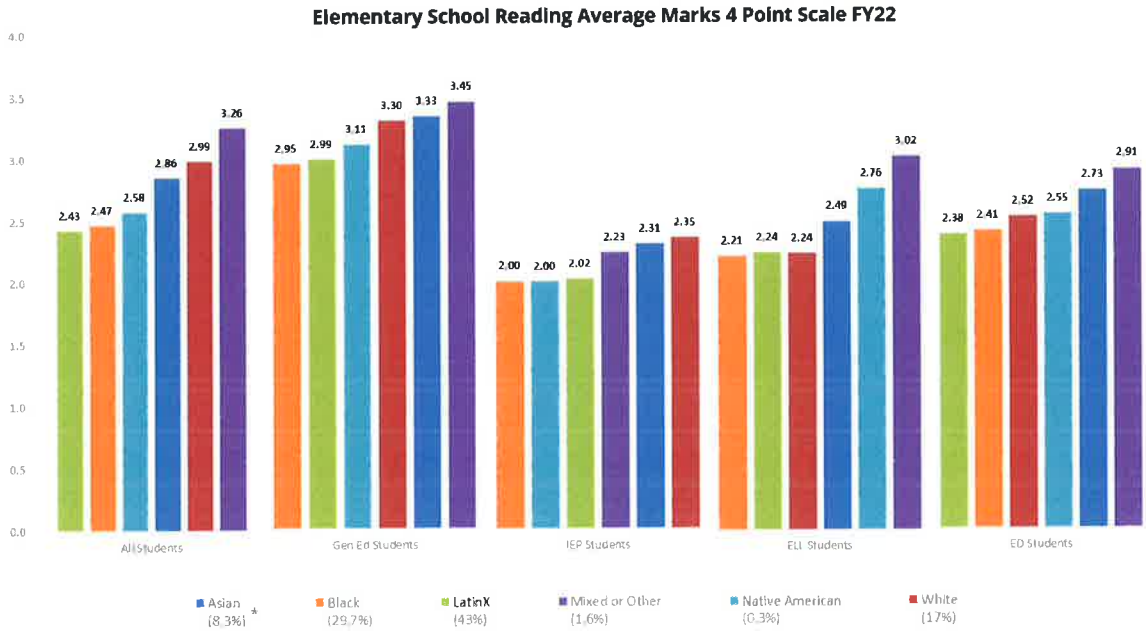
NAEP (National Assessment of Educational Progress) scores for Black and Latinx students in BPS declined at a higher rate than the national average for public districts. NAEP is a national assessment most large districts participate in. The chart below shows BPS in red and the national average in blue. Other peer districts are in light colors. This graph is just 4th grade reading scores, and one can see the gap between Latinx and Black students is widening from those of White and Asian/Pacific Islander students over time. This same trend holds with other NAEP grade level and subject categories.

4th Grade Reading

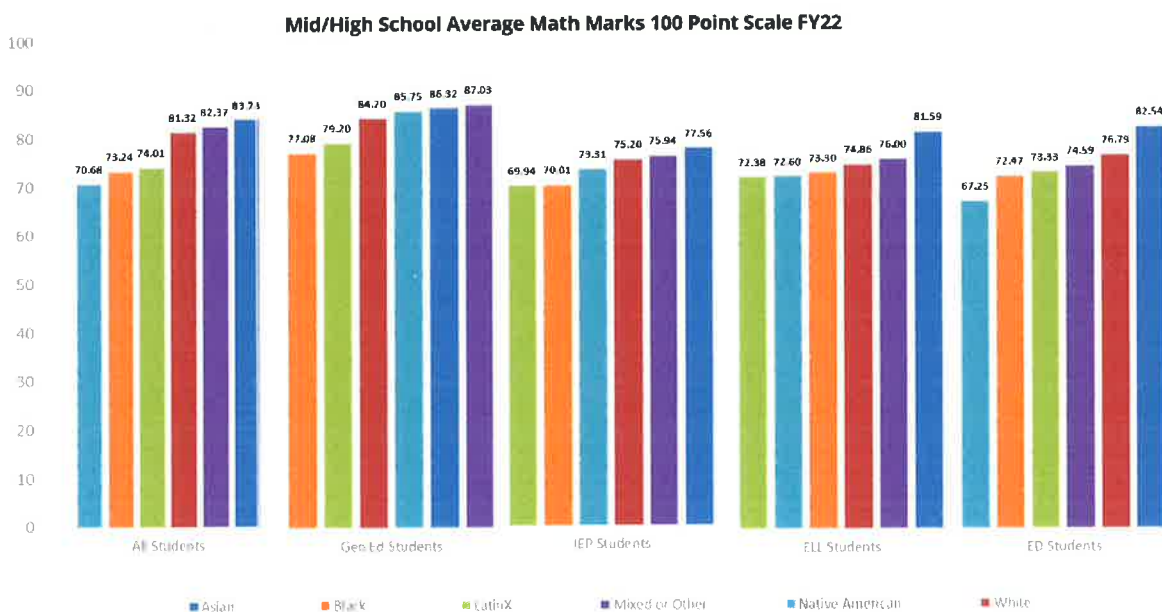
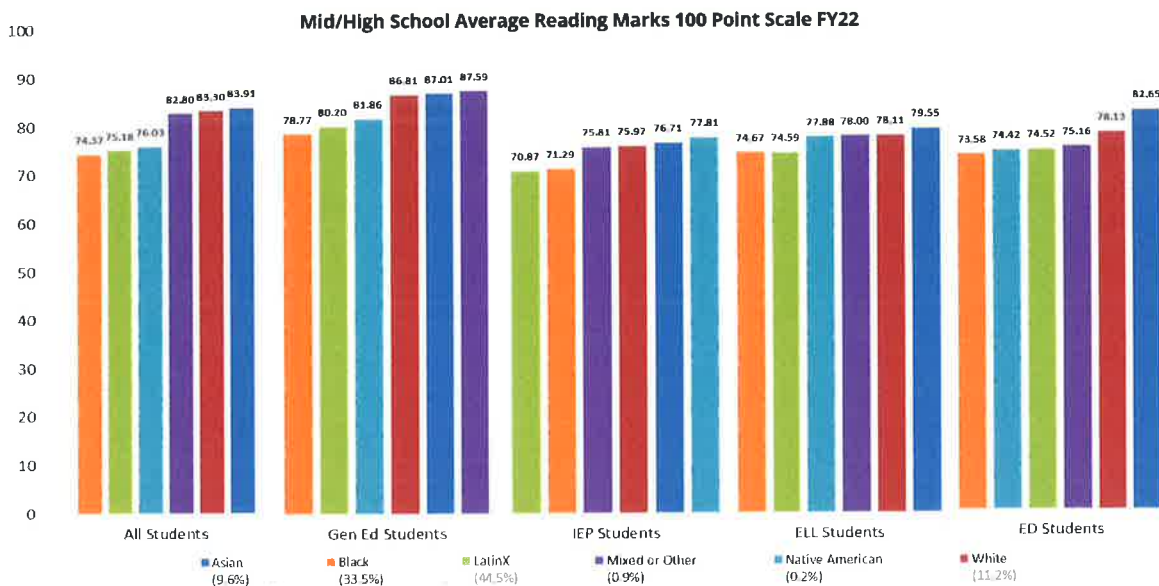




When reviewing actual student grades and growth in subject area over time, the gap in student outcomes by race is a continuous pattern. Elementary students who identify as mixed or other, Asian, or White have higher reading and math marks than students who identify as LatinX or Black, across all subpopulations. Larger graphs with citations can be found in the [Appendix](#).



Secondary students who identify as Black and Latinx have lower reading and math marks than students of other racial groups.



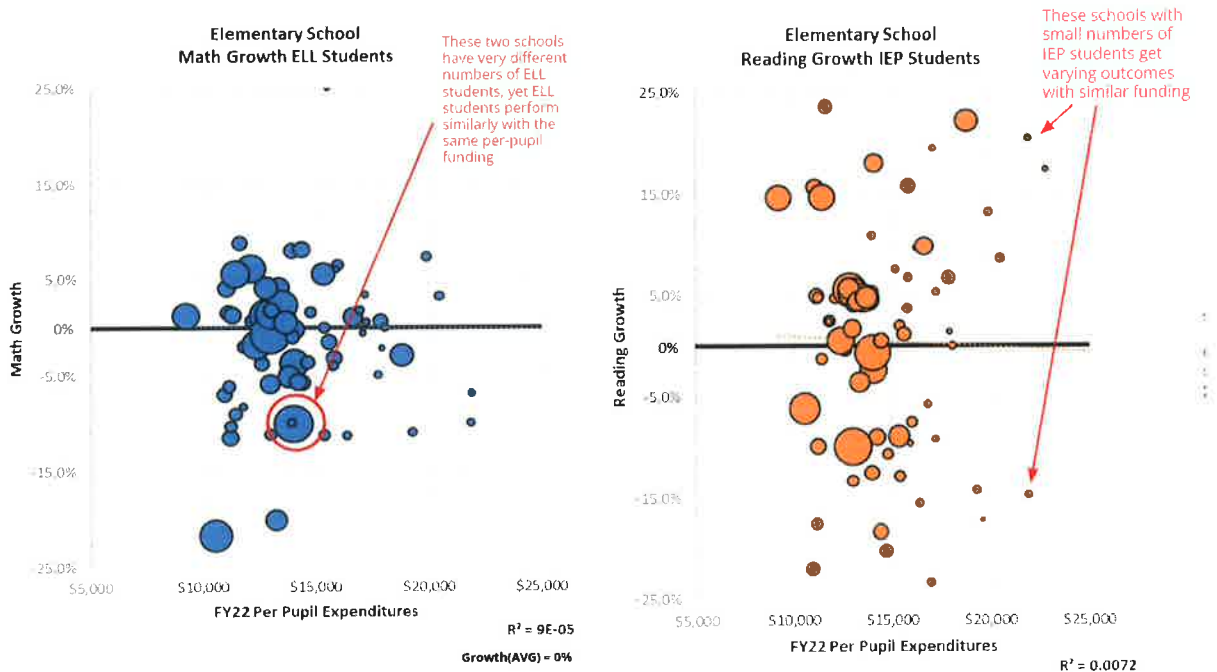
STUDENT OUTCOMES AND SCHOOL FUNDING

After an initial data review, the following key takeaways were found:

- Some student subpopulations have stronger outcomes across the system than others, regardless of school attended.
- No clear high-level trend between school-level expenditures and outcomes across gradespan or any included subpopulations.
 - › This means we need to look deeper to understand how to address outcomes challenges.

- High variability of outcomes and funding, even at the subpopulation level.
 - › This means that some schools are seeing greater growth for similar populations than others with similar per pupil expenses, so there are great opportunities to explore what is working for subpopulations at certain schools.
- There is a wide range in per-pupil spending across schools.
 - › Some of this is expected based on funding allocations, as schools with different student profiles currently receive different funding amounts. It does not seem to be correlated to student racial groups.
- There are schools serving students well across all subpopulations and racial groups.
- There does not seem to be a pattern between enrollment size and outcomes or population size within a school and outcomes.

The [slidedeck](#) includes 28 graphs detailing enrollment and outcomes across different sub-populations. Two examples are included below:



RACIAL INEQUITIES

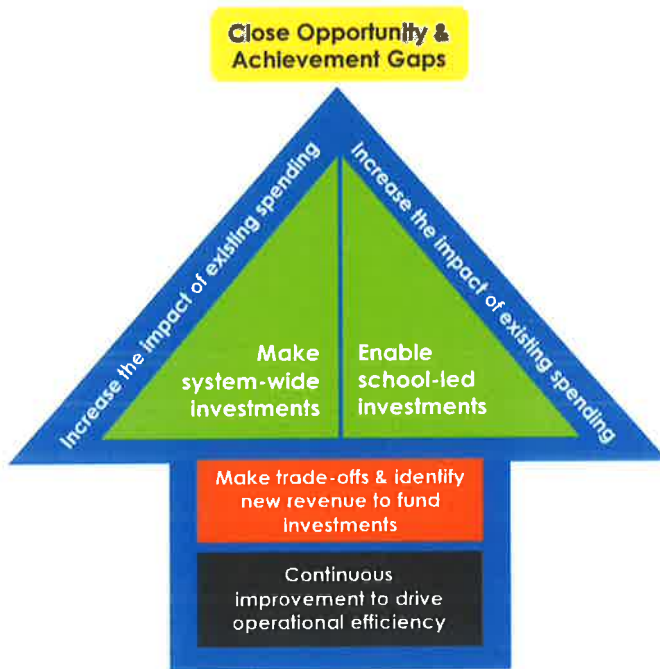
The history of racial inequities as they pertain to BPS funding policy are long and the causes nuanced, and the collective learning from quantitative and qualitative data reveals a possible disconnect between student outcomes and spending across the district.

The forces that have largely driven spending in recent years are connected with operational considerations that play large roles within the district, despite them having little positive impact on student learning and outcomes, they have driven increases across the district. These operational considerations include items such as collective bargaining agreements, district footprint, transportation, and special education identification rates. Several



additional factors have also led to money not being spent on things closely aligned with outcomes, including under-enrolled programs within single schools, school leader autonomy, and the budget process cycle and timeline.

From 2016-2018, the Budget Equity Working Group developed a framework to more tightly align the goal of closing opportunity and achievement gaps to investments. Out of that emerged the Opportunity Index.



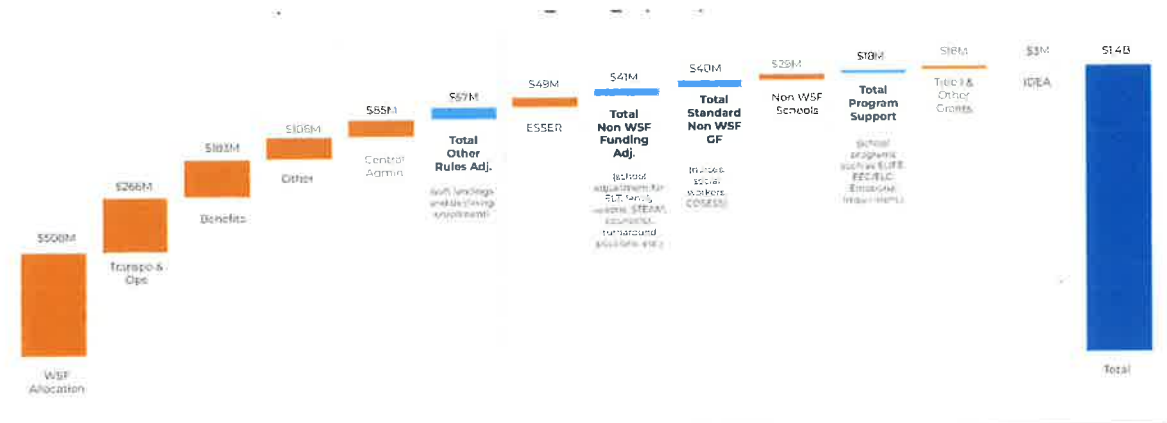
The total BPS population has declined while the budget has increased. There is a relationship between how full a school is and race/ethnicity within BPS. In a weighted student funding system, schools that have classrooms that are filled close to capacity have more flexible funding than schools that have fewer students per classroom (i.e. under enrollment at the classroom level). This is because classrooms must be 87.5% full to pay for the teacher in the classroom. If a classroom is 95% full, the difference between 87.5% and 95% is flexible funding that goes back to the school. If a classroom is 80% full, the school must offset the teacher’s salary with other funds and has no flexible funds

left from that classroom. Schools that serve higher percentages of Black and Latinx students are less likely to be full and therefore less likely to have as much flexible funding available to the school.

BPS has made adjustments to how schools are funded based on demographic shifts, but it has not been enough. Some attempted solutions have included soft landing funds which provided supplemental funds equal to the first 2% of budget reduction to schools experiencing enrollment shifts. In response to the COVID-19 pandemic and the associated enrollment shifts the district employed a “hold harmless” approach to maintaining school budgets despite large enrollment shifts across the district. Throughout the pandemic period, BPS also increased programmatic supports by adding positions to all schools such as psychologists, nurses, and family liaisons. BPS knows this is not sustainable and our students deserve a funding system that can support their success.



This graph below highlights the total BPS budget (large blue bar on the right). The light-blue bars are investments the District has made to try and offset some of the challenges enrollment fluctuations had within the WSF structure. This graph displays the strategies used to allocate funds in the district's budget, and many of these have been introduced in recent years.



Other Rules Adjustment: Includes Soft landing funds and Declining Enrollment Supplements to make school budgets whole in a declining enrollment environment
Non WSF Funding Adjustments: Includes individual school adjustments for ELT, family liaisons, STEAM, counselor, turnaround position & other position
Standard Non WSF Allocations: Includes funding for nurses social workers and COSESS
Programmatic Supports: Includes funding for individual school programs such as SLIFE, EFA, EEC/ELC, Emotional Impairment

At a school-level, incremental changes have impacted overall allocations, but not enough to change outcomes. The graph below is in the [slidedeck](#) and shows a specific school example with allocations in the line-chart and enrollment in the orange bar.

Over the last 4 years, School X has seen:

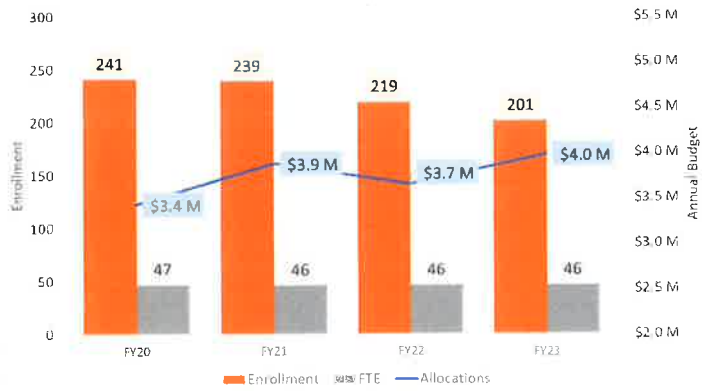
- declining enrollment
- increasing allocations
- flat FTEs

And through this, no change in DESE score*

- FY19 DESE Score: 7%
- FY22 DESE Score: 7%

This demonstrates the opportunity for us to explore the school and student experience

Small School Trends: Projected Enrollment, Budget, and FTE for School X, FY20-FY23



*A DESE accountability percentile between 7 and 99 is reported for results in this category as an indication of the school's overall performance relative to other schools in the same graduation year high schools. Middle/high schools and high schools take a cumulative rating up to two years of data for accountability indicators.

Throughout the RSF project, the Steering Committee has pushed for policies that specifically support rectifying racial inequities in funding. This was supported by a variety of data analyses in which working groups examined school level funding, student performance, school characteristics, such as [Opportunity Index](#), enrollment trends, teacher



vacancy and tenure, Transformation School identification, and the relationship between student race. Some of the findings included:

- An increased Opportunity Index score is highly correlated with higher percentages of non-White students enrolled at a school and higher percentages of economically disadvantaged students at a school.
- Black students have a disproportionately high rate of IEPs. While Black students represent 29% of the student population, 36% of IEP students are black.
- Latinx students comprise 43 percent of all BPS students, but their disability rate is only 23 percent of all Latinx students. Of all students with IEPs, Latinx students comprise 45 percent.
- No clear macro trend between school-level expenditures and outcomes across gradespan or any included subpopulations.
- High variability of outcomes and funding, even at the subpopulation level.

Non- White Students



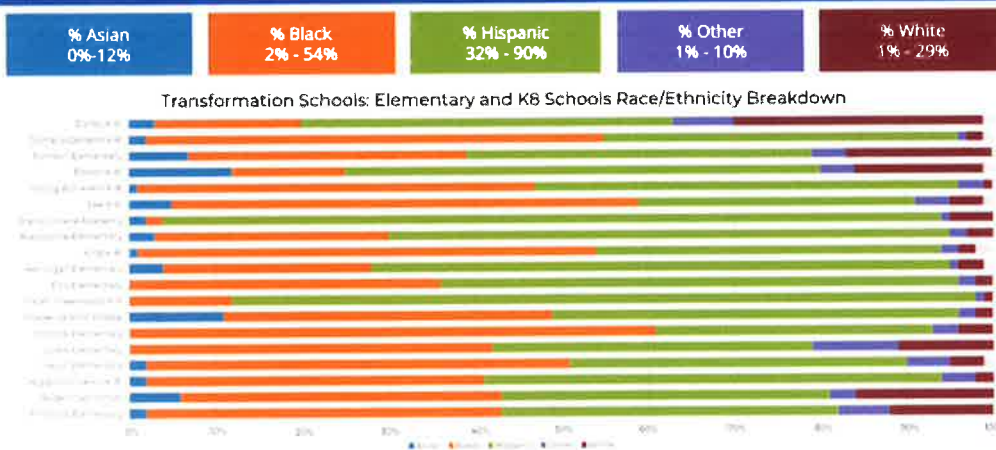
Teacher Vacancy





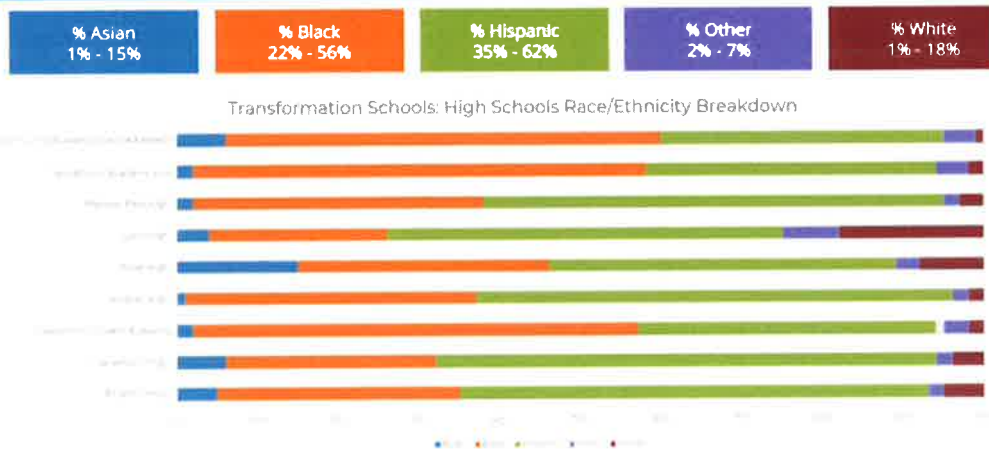
13

The race/ethnicity makeup of BPS Transformation Elementary and Middle Schools varies, depending on the school



14

The race/ethnicity makeup of BPS Transformation High Schools also varies, depending on the school



QUALITATIVE DATA

Interviews with internal BPS staff revealed opinions on funding inequities that need further exploration through data and family engagement. **The key takeaways below are confidential opinions voiced by BPS staff who were interviewed and are not reflective of official BPS policy.**

- The bulk of BPS stakeholders’ perception is that the current school funding methodology is a hybrid of student based budgeting and school resource allocation based (school quality guarantee + autonomy designations) because the current formula doesn’t support the full diversity of needs in schools.
- The school choice policy (and transportation policy), and unique building conditions of BPS schools have created significant operational costs that the WSF does not accommodate for. Schools are forced to make choices between education resources and operational resources.



- BPS decisions for giving school autonomy designations and understanding its outcomes is not fully known or transparent. This perpetuates inequities in the system because knowledge of navigating the process is disparate.
- Meeting the inclusive vision of Special Education is a challenge at BPS. The funding limitations and structures perpetuate a system where students with disabilities are not given the most inclusive environment possible. Lack of transparency and coordination between special education program launches with the Finance and Academics departments allows programs to be started that don't match the quality guarantee.
- Inconsistent rules and special exceptions, legacy funding decisions, and staffing limitations are made that lead to communication issues, distrust, and structural inequity. Schools with less voice or overwhelmed with the day to day operations do not have an advocate for equitable funding between schools and school models. Many of them are not reaching out, or if they are they are not aware of options.
- BPS funding and resources are not deployed where it is needed and there are opportunities to reduce wasteful spending.

An initial [engagement report](#) highlighted additional structural inequities that parents and community members perceive exist in the BPS funding system. See the link to the initial report which was published in December 2022.

A survey in winter 2023 collected responses from 435 parents, educators, staff, students and community members specifically to establish baseline inputs for a reimagined funding policy. Graphs of specific responses are in the [slidedeck](#). These are parent perceptions and shared lived experience from the community.

Some key takeaways included:

- **60.6%** of parent respondents indicated that they disagreed or strongly disagreed that BPS' funding formula and policies distribute funds equitably between schools.
- **54.7%** of parent survey respondents indicated that they disagreed or strongly disagreed they had sufficient resources to navigate their school's budgeting process.
- **49.2%** of parents with a child or children with an IEP and/or 504 stated that they disagreed or strongly disagreed they had sufficient information about BPS schools at the time of enrollment to make the best decision for their child or children.
- **58.2%** of parents with a child or children with an IEP and/or 504 stated that they disagreed or strongly disagreed that their child or children has access to the same quality of curriculum as students in other schools.
- **54%** survey respondents that indicated their child or children have an IEP and/or 504 plan stated that the disagree or strongly disagree that their school has the flexibility to use available funding resources to meet students' needs.



IV. Funding Policy Proposal

Established Values & Who to Center

The ReImagined School Funding Policy initiative developed a set of project values to be centered in every working group, meeting, and ultimately in the final recommendation. Those values included:

EQUITY:

Elevate the voices of historically marginalized groups who have had little or no voice in school funding decisions.

TRANSPARENCY:

Establish a process for transparent, authentic community engagement so the funding formula includes and honors the voices of the BPS community.

SHARED-DECISION MAKING:

Ensure that stakeholder input is valued and clearly reflected in the redesigned funding methodology.

STUDENT CENTERED:

Create a new or modified funding methodology that clearly centers and directly impacts students.

The initiative was guided by the [BPS Racial Equity Planning Tool \(REPT\)](#), which lays out a six-step process to ensure each decision made is aimed at closing opportunity gaps and advancing racial equity. The REPT also includes a [spectrum for community engagement](#), developed by [The International Association for Public Participation \(IAP2\)](#). The spectrum prioritizes engagement focused on involving, collaborating with and empowering the public.

The design of the initiative utilized the frameworks to put those most impacted by the new funding policy – students, community members, and school leaders, at the core of the work, with the purpose of working collaboratively and empowering Steering Committee members to develop the new funding priorities and funding policy recommendations.

One of the Steering Committee's first objectives was to identify the priority student populations that should be centered in any new funding policy. This work was done following a [Targeted Universalism](#) approach to equity, where universal goals are pursued by targeted processes to achieve those goals. Solutions developed with a Targeted Universalism approach support the most marginalized groups while simultaneously helping all students advance toward the shared goal.

The goal of RSF was to **redesign the funding policy to more equitably support each child to achieve and thrive with a focus on BPS students and families that have been historically marginalized.** The Steering Committee's identification of those specific student and family groups laid the foundation for a final recommendation which includes specific, targeted support for these groups.



Recognizing the intersectionality between these groups, the primary student groups identified to center in this process included (in no prioritized order):

- Students with disabilities
- Multilingual learners
- Multilingual learners with disabilities
- Students who are low-income
- Students who identify as Latinx
- Students who identify as Black
- Students who identify as BIPOC
- Students who are immigrants
- Students who are homeless or housing insecure
- Students who have experienced trauma
- Students who are over-aged and under-credited
- Students who are incarcerated or formerly incarcerated
- Students who are historically lower performing

The Steering Committee's main charge was to **establish tenets and guiding principles** for any new funding policy to use as a guide. The following tenets served as the framework for the final recommendations:

- All students and schools must be served intentionally by the policy, focusing on the whole child and schools' ability to meet each child's needs.
- Acknowledge that our whole student body deserves strong supports; core services must be redefined to include services and supports that ensure our students' well-being, and funding policy must support this.
- We must acknowledge inequities for students who identify as Black and Latinx, for Multilingual Learners, and for students experiencing poverty and trauma; resources must be equitably available to support schools serving these students who have been historically marginalized.
- We must ensure the resources for inclusion success are available; schools and staff should be structured to serve the vast majority of students, including learners with special education needs, in the general education setting, while supporting the specialized needs some students have.
- We must aim for equity in allocation amount; some groups of students may need additional supports beyond an already increased level of supports for a new understanding of "general education" including students with disabilities and multilingual learners.
- We must also aim for equity in process, training, and capacity building of school leaders and have more uniform supports available to navigate their funding and budgeting decisions.
- We must demonstrate trust in school leaders, and communities who know their unique needs and populations best by providing for some level of school leader and community decision-making and flexibility, while balancing the need and desire to ensure all students, regardless of school, have access to essential resources.

- Policies must be grounded in BPS values and strategy, with the ability to allow for a multi-year implementation of District priorities (such as a multi-year phase-in to inclusive classrooms) and the ability to withstand changing dynamics at the school and system level over time.
- The policy must be transparent and easy to understand.

High Level Policy Proposal Recommendations

Utilizing these tenets as a guiding framework, the Steering Committee developed recommendations categorized into the three primary funding policy components:

FUNDING ALLOCATIONS:	FUNDING USE POLICY:	BUDGETING PROCESS:
The methodologies which are used to calculate staffing, resource, and/or funding allocation amounts to schools.	The rules and guidelines which specify, for each specific allocation, the degree of flexibility a school has over use of that allocation.	The process in which the District, schools and the community go through to determine staffing, resources, and funding in each school.

Funding allocations are currently the primary way schools receive funding to meet their student and staff needs and innovate around education. The Steering Committee heard a resounding desire for families to have predictability in a baseline set of services within every school at BPS. They also recognize the local context of each school community, and the importance of the school leader’s voice in resourcing decisions. The recommendations separate funding allocations from funding use policies, and as such set forth guidelines for a baseline set of allocated positions in addition to fully flexible funding, with flexibility built into the funding use policy to allow community input into the innovative adjustments that school leaders and communities may want to see to meet their own school communities’ needs.

These recommendations are intended to be a roadmap for BPS to achieve greater equity in school-based funding and better serve students who are the most marginalized in the system currently.

FUNDING ALLOCATION RECOMMENDATIONS

The goals of the funding allocation policy are to:

- Prioritize funding first to those most inequitably served.
- Provide the necessary resources and support for all students to achieve and thrive within their school.

To achieve these goals, the Steering Committee recommends the following funding allocation policies:

- A. Fully fund resources needed for students with disabilities and Multilingual Learners first, at every school. This could look like:



1. All classrooms will be funded to meet the staffing, programmatic and scheduling needs of their approved and academically appropriate program model, regardless of student enrollment in each program, which may include but is not limited to:
 - a) For students with disabilities: general education classrooms, inclusion classrooms, partial-inclusion classrooms, and sub-separate classrooms.
 - b) For multilingual learners, including those with disabilities: Dual-language, SLIFE, Transitional Bilingual Education (TBE), SEI, and inclusion classrooms, based on students' ELD levels.
2. Fully and directly funding pull-out and push in resources as defined in student IEPs, 504 plans, and English as a second language (ESL) services by English language development (ELD) level.
3. Providing funding to ensure student's environments are conducive to learning and succeeding, including but not limited to lighting and other sensory adjustments.
4. Increasing school psychologists to ensure they have capacity to meet student's required needs and can support robust evaluation processes.
5. Supporting families and students who participate in special education or ESL programming and students with limited or interrupted formal education (SLIFE) through:
 - a) Increased administrative support for schools with multiple classroom models.
 - b) Increased Family Liaisons for schools with special education programs, SLIFE and Transitional Bilingual Education programs to ensure these families are supported specifically.
 - c) A minimum guaranteed, full-time COSE in every school to support inclusion and special education needs.

B. Ensure a baseline of funded resources that students and families can expect within all BPS schools, this could look like but is not limited to:

1. Fully-funded instructional staff to meet the programmatic needs of the approved program model and to support all students.
2. Increased baseline of positions that support student health and wellbeing, with ratios based on industry practice or better, including:
 - a) Increased social worker allocations in all schools.
 - b) Increased Guidance Counselor allocation for all schools to support student development (academic, social and emotional, college and career) as well as grade transition support.
 - c) Guaranteed, full-time school nurses in every building.
 - d) Guaranteed school psychologists in every building to support all students, with a minimum of 0.5 FTE.



3. Increased Specialist Teacher allocations to provide more access to art, music, physical education, computer science, and other non-core instruction and extracurricular activities.
4. Increased administrative supports so school leaders can prioritize instructional and operational leadership, including but not limited to:
 - a) A minimum of two administrators² at every school regardless of enrollment or size to ensure there are no single-administrator buildings.
 - (i) Additional Assistant Principals or other evaluation-level administrators based on staff sizes to support staff growth and development.
 - b) Clerical staff to support the programs and families within the school.

C. Better equip schools with resources to support academic and behavioral interventions could look like:

1. Increased Administrator allocation based on the number of teachers within a school to support operations and evaluations.
2. Ensure FTE minimums at each school to meet the purpose of the position, through fixed allocations regardless of school size.
3. Support the scheduling process by allocating partial positions in 0.5 FTE only.
4. Guaranteed funding for supplies and high-quality instructional materials based on the enrollment at their school (number of students + grade level).
5. Guaranteed funding for enrichment opportunities including, but not limited to field trips, before and after school programming, and partnerships.
6. Directly allocate required positions, such as lunch monitors.

D. Allocate resources based on need rather than purely building or student count. This could look like:

1. Fully fund classroom models based on the program model regardless of enrollment and without trading off other vital staffing resources.
 - a) Allocate elementary classroom teachers on a classroom-basis within a school.
 - b) At the secondary school level, allocate teachers to ensure all students can graduate on time to meet the BPS graduation requirements.
2. Increase Social Worker allocations at schools with high percentages of students experiencing poverty to support non-instructional needs and trauma.
3. Allocate instructional coaches to schools with more novice teaching staff and/or high turnover rates.

² Please note while some recommendations around position allocations may appear duplicative, the individual recommendations highlight different areas of need within a school and the ways in which potential support could be provided.



4. Provide additional supports specific for Transformation Schools, including but not limited to guaranteeing:
 - a) Cluster Substitute allocations to ensure consistency in the adult presence across the school.
 - b) Instructional Coaches to support instructional practices.
 - c) Additional administrator (e.g. operations manager or equivalent) to support school operations.
5. Increase allocations of family liaisons and social workers for schools with SLIFE and Newcomer programs to ensure families who are new to the USA and district are supported.
6. Flexible funding allocations based on per-pupil percentage of students in poverty, with accelerations for schools with exceptionally high percentages of students in poverty, regardless of size.
7. Guaranteed administrative support (i.e. Assistant Principal) specific for middle school grades to support the unique needs of that student population.
8. Schools with students who have recurring needs should automatically be allocated resources specific to those needs annually, without requiring annual requests. An example could include wheelchair evacuation equipment and training.

FUNDING USE POLICY RECOMMENDATIONS

The goals of the funding use policy recommendations are to:

- Balance the individual needs of school communities with equitable guarantees of services that students and families can expect at BPS schools.
- Utilize the strength of school leaders to develop innovative strategies and corresponding resourcing plans to support their students, staff, and communities.

To achieve these goals, the Steering Committee recommends the following funding use policies:

A. Specificity in intent; Flexibility in implementation.

1. The majority of school resources should come as position allocations, so school communities understand what the school's baseline level of resources could be based on the allocation rules.
2. The school leader, with community approval through the governing board, school site council, or other mechanism, may reallocate positions or services as long as the plan for adjustments meets the school's strategy and does not violate any law or policy requirements.
 - a) In cases where an allocated position is meeting a legal or contractual obligation, any reallocation decision made by a school leader and governing board/school council must also meet the same legal or contractual obligation.



3. If any adjustments to the allocations result in positions with lower average salaries than the initially allocated positions, schools should be able to retain the difference.
4. BPS should consider developing a flexibility scale matrix to provide guidance and transparency about which resources can be adjusted and which are more fixed, including which are legal or contractual obligations.

B. School-level hiring and management decision-making.

1. School leaders should make the majority of hiring and management decisions based on the approved budget allocations. The allocation of a position does not automatically imply centralized management of the particular staff members.

BUDGETING PROCESS RECOMMENDATIONS

The goals of the budget process recommendations are to:

- Improve transparency in BPS budgeting process for school leaders, parents, and community members.
- Ease the administrative burden for school leaders to enable their focus on equitably serving students.

To achieve these goals, the Steering Committee recommends the following budget processes:

A. Creating year-over-year funding stability through a rules-based system that is less reactive to small changes in enrollment and easier to navigate.

1. The method for determining the baseline budgets in each school should be transparent and rules-based, with each position or category of resource clearly defined.
2. Rules should be reevaluated through annual consultation with central office, school leaders, subject matter experts, best practice guidelines, and an ongoing budgeting advisory group.
3. Specific processes should be established for circumstances where projections under-estimated student needs, to ensure a fair, equitable, and transparent process across all schools.
4. School budgets should not decrease once set, even if projections are over-estimates.
5. Staffing allocations should be based on classroom-type and program needs.

B. Transparency in all resources within a school, regardless of fund-type or revenue stream.

1. School budget documents should include all resources within the school, regardless of fund-type or revenue stream.



- a) This includes positions such as custodians, food service, transportation, and support positions (e.g. PT, OT, SLP, etc.) that are managed centrally.
 - b) Private funds, partnerships, and donations should be included in school budget documents.
2. The original rules-based allocations AND final resourcing decisions should be included in final budget documents to provide transparency to the community about flexibilities and school-level decision making.

C. School communities should be directly engaged in budgeting decisions.

1. School Site Councils or Governing Boards, which all schools should have, should be empowered and supported to build capacity to support school leader budgeting decisions.
 - a) A process for community engagement around adjusted position allocations should be determined.
 - b) BPS budget process timelines should be adjusted to ensure communities have sufficient time to be true partners and decision makers.
2. An on-going district budget advisory group should be established to guide BPS budgeting priorities and process.
 - a) This group should include representatives from the community, parents, historically marginalized groups, and school leaders.

D. Processes between school leaders and central office teams should focus on resourcing plans to increase student achievement rather than compliance requirements.

1. All compliance checks should be completed by central office staff prior to the collab process (i.e. when preliminary budget estimates are released).
2. Alignment of budget process and District-wide strategic planning.

Enabling Actions and Uplifting Other Resource Inequities

The Steering Committee acknowledges that some of the recommendations may require changes to existing processes or policies that are outside the scope of this project. The Steering Committee also recognizes that resource inequities within BPS exist outside of the funding policy. This section outlines the enabling actions that may need to occur to fully implement the recommendations and uplifts inequities identified throughout this process for future consideration.

RECOMMENDATIONS ON ENABLING CONDITIONS FOR IMPLEMENTATION

- A. May need to **phase in instructional investments** over a multi-year RSF implementation plan.



- B. Develop transparent, **centralized processes for determining classrooms and programming at schools**, including number of classrooms open, special education and MLL strand placement, what inclusion models are used in which classes, and instructional program placement (e.g. IB, early college, Excellence for All, etc).
 - 1. This may require adjustments to existing job descriptions or work streams for the central office team members.
 - 2. This may require academic departments to adjust processes for determining program models and staffing.
- C. **Collect and standardize new data** on students with 504-plans, the needs of students receiving Special Education services, hours in least restrictive environment, special education evaluation waitlists and time-to-evaluation, criteria for sub-separate strand placement, and other data on student need or characteristics.
 - 1. This data should then be utilized to better meet the intent of the policies, including but not limited to:
 - a) Funding all special education services based on 504-plans and IEP minutes data as baseline for caseload, not student counts or disability code.
 - b) Funding school psychologists based on IEP minutes data plus waitlist times, plus a minimum for the school community as a whole.
 - c) Ensuring program models for classrooms are based on student needs.
- D. Ensure rules and **processes for non-instructional special education and MLL related services (such as physical therapy, speech and language pathology, etc.) and classroom/staffing model determinations are transparent and effectively communicated** to all stakeholders.
 - 1. This will require BPS to establish a system of controls to ensure funding of all IEP services and MLL services are actually occurring at the school level.
- E. Support schools to **share part-time positions**, thereby increasing student access and choice.
 - 1. This may mean shifting some responsibilities or roles to a regional structure.
- F. **Collect and make available all revenue information by school**, inclusive of philanthropy, fundraising, and other private sources.
- G. Create a **school-budget impact analysis process** for BPS central office and School Committee prior to any policy changes being voted on, ensuring funding policies are developed with trade-offs considered, and preventing unfunded mandates before new priorities are established.
- H. **Consider language requirements of staff** across administrative and non-instructional positions.
 - 1. This may require changes to job descriptions, creation of new job types, or discussions with collective bargaining units to better support the needs of students and families.
- I. **Continue the engagement process with stakeholders** that include, but are not limited to, school leaders, teachers, school staff, students and families, school



committee, etc. to continue discussion of opportunities and risks for potential implementation.

HIGHLIGHTING OTHER RESOURCE INEQUITIES

School funding is *one of many* dimensions of resource equity that impacts a student's experience and outcomes, and it enables many of the others. The Alliance for Resource Equity outlines ten [Dimensions of Resource Equity](#) that impact school and student experiences. Through the process of this Reimagine School Funding initiative, the Steering Committee heard and voiced many challenges to equity that stem beyond the direct funding policy.

The Steering Committee members recognize that the funding policy alone cannot solve all the institutional and structural obstacles that exist for students and families within BPS. Some members felt that the scope of funding policy was not broad enough to enact the changes they desired.

This section raises up other resource inequities outside the funding policy that emerged³.



1. Teaching Quality and Diversity

- a. *Definition*⁴: Does each student have access to strong teachers and teaching practices that meet their needs? Do the teachers reflect the diversity of the student population?
- b. *Steering Committee Highlights*:
 - i. Improve training and professional development for inclusion practices, the social/emotional needs of low-income students, and students who have experienced trauma or other mental health challenges.
 - ii. Adjust job descriptions to more flexibly meet school needs such as requiring specific language capacity.

³ Note: This list excludes the dimensions of school funding and high quality early learning

⁴ Definitions are from the [Alliance for Resource Equity](#). BPS acknowledges race, ethnicity, socioeconomic status, disability and language as important components of the diversity definition for the BPS community.



- iii. Make changes to staff evaluation process to ensure more targeted professional development and support.
- iv. Address teacher vacancies.
- v. Update policies around teaching credentials to ensure students have credentialed instructional staff.

2. School Leadership Quality and Diversity

a. *Definition:* Does each student have access to strong school leadership that meets their needs? Does the school leadership reflect the diversity of the students and staff?

b. *Steering Committee Highlights:*

- i. Prioritize additional administrative supports in schools to allow more time and capacity of school leaders to be instructional leaders.
- ii. Create mentorship opportunities for new school leaders.
- iii. Identify and analyze staffing vacancies and high turnover rates in order to identify strategies to better support and retain staff.

3. Empowering, Rigorous Content

a. *Definition:* Does each student have access to high-quality and culturally relevant curriculum, advanced courses, arts, and enrichment opportunities?

b. *Steering Committee Highlights:*

- i. Understand and align to new BPS graduation requirements in all high schools.
- ii. Clearly define and share definitions of programs, staffing requirements, and course catalogs.
- iii. SEL (Social Emotional Learning) curriculum.
- iv. MTSS (Multi Tiered System of Supports) implementation.
- v. Define strong pedagogy of MLL instruction and build curriculum based on current MLL student need, including native language supports.
- vi. Promote more innovative programming.

4. Instructional Time and Attention

a. *Definition:* Does each student who needs it receive additional instructional time and/or attention?

b. *Steering Committee Highlights:*

- i. Master scheduling process, timeline, and training. Move towards a more proactive scheduling process including creating a mock schedule that aligns with budget allocation.
- ii. Differentiated student need
- iii. MTSS (Multi Tiered System of Supports) implementation

5. Positive and Inviting School Climate

a. *Definition:* Does each student experience a safe and supportive environment, fair rules and policies, positive relationships with staff, and meaningful family engagement?



b. *Steering Committee Highlights:*

- i. Promote School safety
- ii. Field trips and school-based activities
- iii. Increase and formalize family engagement practices at BPS
- iv. There should be increased transparency and process with private fundraising

6. Student Supports and Intervention

a. *Definition:* Does each student have access to the social-emotional, physical, mental health, family, and post-secondary education support they need?

b. *Steering Committee Highlights:*

- i. Access to before and after school programming
- ii. Access to arts, athletics, other enrichment opportunities
- iii. Community partnerships
- iv. Restorative practices
- v. Supports for homeless students and those in the foster care system
- vi. Increase the number of school counselors at all levels to improve the BPS postsecondary outcomes and measurements

7. Learning Ready Facilities

a. *Definition:* Does each student attend schools with safe, well-maintained facilities? Does each student have access to functioning, up-to-date equipment?

b. *Steering Committee Highlights:*

- i. Inequities in facility quality across district
- ii. Inequities in access to heating, cooling, and HVAC across district
- iii. Outdoor spaces for learning and activities

8. Diverse Classrooms and Schools

a. *Definition:* Does each student attend schools and classes that are racially/ ethnically and socioeconomically diverse?⁵

b. *Steering Committee Highlights:*

- i. Assignment policies across the district
- ii. Tension between school needs and alignment with job descriptions and qualifications

Prioritization

The Steering Committee recognizes that achieving our proposed vision will take time and investment beyond today's funding levels. As a result, the Steering Committee has spent time throughout the RSF process to determine the prioritization of these recommendations. This has included discussions around what components of the recommendations may make

⁵ Definitions are from the [Alliance for Resource Equity](#). While disability and language are not included in their definition, BPS acknowledges disability and language as important components of the diversity definition in the BPS community.



the biggest overall impact for BPS students, and what the trade-offs may be for prioritizing one recommendation over another. The Steering Committee has determined the following policies and goals to prioritize within this recommendation:

- A. Structurally fund inclusive general education setting classrooms, based on the district's inclusion strategy roll-out and approved models. Ensuring that all schools and staff should be structured to serve the vast majority of students, including learners with special education needs, in the general education setting.
- B. Structurally fund programs that best serve multilingual students and multilingual students with disabilities at different ELD levels, including SLIFE, dual language, transitional bilingual education, and SEI programs, as well as general education inclusion classrooms.
- C. Ensure all positions required by law or policy, including those outlined in IEP and ESL services, are clearly articulated and are guaranteed. Ensuring that if a school needs to maintain certain classrooms and programs to serve their students specific needs, the School Leader should not need to "find" the funding to implement.
- D. Significantly increase investments in student mental health and well-being with a focus on those from higher needs backgrounds.
- E. Allocate additional staff and resources to provide students more equitable access to specials and enrichment, focused on a more joyful student learning experience.
- F. Allocate additional resources for schools with above average needs, including: Transformation Schools, schools with low teacher experience, and schools with highest levels of students experiencing poverty.
- G. Ease the administrative and operations burden for school leaders to enable their focus on equitably serving students.

Throughout this process, the Steering Committee has continued to center those BPS students and families who have been historically marginalized and have worked to ensure that the prioritization of recommendations would be most beneficial to these groups.

That being said, the Steering Committee feels it is important to name and recognize the injustices in the historical funding of BPS schools. While the Steering Committee recognizes the reality and limitations of present day funding levels, the ultimate end state for this work would be that all recommendations are funded and implemented with fidelity, helping to ensure that BPS students and families are able to receive rigorous, high-quality education in schools that meet their unique needs.



V. Anticipated Impact

Intended Impact of Policy Design

INTENDED SYSTEM WIDE IMPACTS

When BPS set out to reimagine its funding system the intent was to create a more equitable and transparent funding system and to do so in collaboration with the family, community members and school leaders most impacted by funding decisions. The BPS Racial Equity Planning Tool (REPT) was a grounding document for the work and drove much of the project structure and project processes. The BPS REPT sets forth the charge that:

Advancing equity requires ending individual, institutional, and structural racism and bias, and deliberately, thoroughly, and consistently applying a rigorous equity lens to our work. To foster a barrier-free environment where all students, regardless of their race or ethnicity, have the opportunity to achieve, we must disrupt status quo methods of decision-making, differentiate resource allocations, include community voice, and provide the support and authentic opportunities students need to thrive (p.1).

The Reimagine School Funding Project was anchored in the equity goals outlined above and through this report and it sought to do so by creating a funding redesign process that disrupted status quo decision and policy making by centering community voice in the design and the impact goals. The process led to a variety of outcomes from the district taking accountability for what they knew was not working and seeking real community input, to parents, advocates, and school leaders working together to understand their various perspectives and design a roadmap for building a better BPS. The intended impacts are outlined below and include direct to student impacts, community engagement impacts, and theory of change impacts in terms of how BPS now conceptualizes and approaches budget design and decision making.

A ROADMAP FOR EQUITABLE FUNDING

One of the broader impacts of the new funding design, based on feedback from the community, was focused on divesting from the funding model that previously tied school budgets to enrollment trends and instead focuses on prioritizing stability. This new model aims to have a more stabilizing and positive impact on the school system by ensuring BPS schools can provide a robust educational experience for students regardless of declining enrollment.

In addition, the model hopes to align funding with the district's instructional values by prioritizing classroom models focused on funding based on student need, with multilingual learners and students with disabilities being fully funded first in those classrooms. This helps drive toward the district's instructional inclusion model.



KEY SHIFTS TO STUDENT AND SCHOOL FUNDING

The Steering committee made four major recommendations (outlined in greater detail in Section IV of this report above) that help to create guidance for how the district can fund more systemic equity measures while also investing in some overall quality investments for every student and school in the system. The intended impact of these recommendations are:

1. Fully fund resources needed for students with disabilities and Multilingual Learners first, at every school.

Intended Impact: Ensure funding resources in the district go first to students with disabilities and multilingual learner students. Making the decision to fully fund students with disabilities and multilingual learners first at every school highlights them as a priority in the district. This could enable school leaders to have more time to get specialized programs, materials, equipment, and staff prepared to implement programming and support and it can ensure that as district budgets ebb and flow with city and federal funding changes, students with disabilities and multilingual learners remain as insulated as possible from funding limitations.

2. Ensure a baseline of funded resources that students and families can expect within all BPS schools.

Intended Impact: The intent of this recommendation is to ensure that there is a level of services and quality that all families can expect at BPS schools citywide. This set of guaranteed services could be determined a variety of ways as outlined in the recommendations in Section IV, however, the expectation would be that over time this set of services increases and becomes more stable school to school. The intent is to ensure that students and families experience continuity of services between school buildings and that school staff can expect a baseline set of school services to be guaranteed in all buildings regardless of enrollment trends.

3. Better equip schools with resources to support academic and behavioral interventions.

Intended Impact: This recommendation is intended to ensure that schools are able to be responsive to supports that students, families, teachers, classrooms, and schools communities need as they arise. This means both building capacity for schools to have the resources, training and support in advance of any issues arising and it means budgets being flexible, responsive and robust enough for staff to attain necessary supports and interventions in a timely manner in order to be responsive to students, families, classrooms and schools communities with the supports they need at exactly the moment they need them.

4. Allocate resources based on need rather than purely building or student counts.

Intended Impact: The intent of this shift is to allow instructional program design to drive funding instead of having funding determine instructional program design so that schools can plan resource allocations based on student need and not budget numbers. This requires both a budgeting shift, so that the budget is designed to be more responsive to need than numbers and it requires a programmatic shift that



articulates more clearly the programmatic design, instructional impact, and aligned allocation of resources needed for a specific program design. In this model the budget and the programmatic design have to work together to ensure that the quality of the schooling experience is scaffolded by a stellar instructional programmatic design to meet the needs of each student, which is in turn supported by a responsive budget formula, there to resource the classroom with all it needs to thrive.

PRECEDENT SETTING COMMUNITY ENGAGEMENT

The Community Engagement Model for the ReImagine School Funding Project is anchored in the International Association for Public Participation’s (IAP2) Spectrum of Community Engagement highlighted in the BPS Racial Equity Planning Tool (p.8).

The structure of that engagement was redesigned early on in the project based on direct community feedback from initial interviews conducted and initial community feedback forums such as the Citywide Equity Roundtable (Spring and Summer 2022) that the project structure, as initially designed, would perpetuate models of community engagement that were limited to one-way information sharing and minimal if any shared decision-making. As such, the project was restructured to move the community engagement pieces further along the spectrum of engagement and ensure those most impacted by the funding decisions were at the center of the design and decision making from the beginning of the project. *(In depth details about the final project structure can be found in this report in Section II and in the Engagement Report in the Appendices).*

INCREASING IMPACT ON THE DECISION

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

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Source: [International Association for Public Participation](#)



The intent of the final project structure was to empower the Community Steering Committee, after an almost year-long engagement with an ecosystem of connected collaborators from school leaders to district finance and academic staff to their community partners and constituents, to make a recommendation for the new BPS school funding policy to the Superintendent. This structure was designed intentionally to ensure that community perspective, voice, and leadership were central to determining the defining tenets of the RSF Project and ensured they had dedicated time and space to articulate their vision for a BPS where their representative groups could thrive. That time and dedicated space in the project structure was designed to ensure that community voice was not subsumed by traditional hierarchical policies and practices often enacted in school systems where community voice can be silenced, intentionally or not, by central office systems, structures and staff, especially when beginning a new initiative. The RSF Project intentionally sought to disrupt those traditional ways of beginning a new initiative and instead sought to truly center the community voice in the core tenets of the project and to be responsive to their leadership, perspective, ideas, requests, and designs along the way.

This community engagement model sets a new trajectory for deep collaboration and makes strides toward more community involvement in the design of BPS initiatives. It utilizes the expertise of an ecosystem of BPS community members to grapple with district wide problems and set the vision for the district direction while ensuring community members who do so are compensated for sharing their time and expertise. The model is responsive to community ideation with monthly cycles of discussion and new content developed based on their feedback and data requests. School Leaders shared expertise and implementation guidance about what works and doesn't while offering perspective and what would be limiting in their goals to serve students to the best of their abilities and what might make the most significant differences in supporting their students at the school level. Central staff primarily listened and learned, trying to understand application possibilities from varied and multiple perspectives, grappling with compliance parameters, and taking community direction and school leader challenges as shared work and problems to resolve together in the new funding system. Steering committee members requested specific data sets, gave feedback on nascent policy proposals, advocated for the needs of their specific communities, designed the core tenets of the new funding model, and made recommendations about both funding allocation and funding use policy for the district. The impact of this is an unprecedented BPS funding recommendation package that amplifies the voice and perspective of the community and their desired community outcomes for BPS students.

In order to build on this deepening foundation for community engagement and continue to invest in partnerships with community members we recommended that a committee of Steering and School Leader voices continue to offer leadership, guidance, and direction on funding decisions that impact students, families and school communities and that shared decision-making with the broader BPS community become the standard operating procedure for building a better BPS.

STUDENT AND SCHOOL SPECIFIC IMPACTS

The goal of the Reimagine School Funding initiative is to redesign the funding policy to more equitably support each child to achieve and thrive with a focus on BPS students and families that have been historically marginalized. BPS's Racial Equity Planning Tool

explicitly identifies certain student groups - Black, Latinx, multilingual learners, students with disabilities and economically disadvantaged students as those who have been historically marginalized. We anticipate that redistributing funds towards these student groups that have been furthest away from opportunity will provide support in the school building for each child to achieve and thrive.

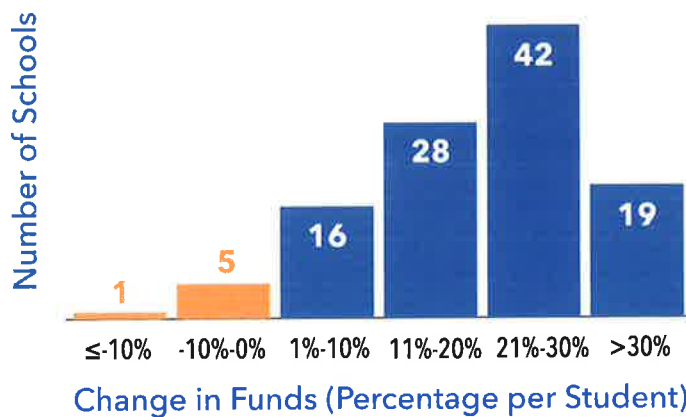
Schools are the locus of change. That has been a core tenet of this project from the very beginning. The proposed budget and tenets (detailed in Section IV) emphasize that trust in school leaders and communities is the pathway to ensure all students have access to essential resources, despite the variety in school population. Below we add details of the anticipated impact of the funding allocation and use components.

FUNDING ALLOCATION IMPACT

Note: The assumptions used to develop the impact analyses and “future state” below are AN EXAMPLE of how BPS could apply the recommendations.

This project used Targeted Universalism as a framework to center specific populations while setting universal goals. As a core principle of Targeted Universalism, you’ll see in Figure 1 and 2 (below) that while setting an intention to support the most marginalized groups, the proposed recommendation simultaneously helps all students to advance toward the universal goal of increased funding to schools.

**Number of Schools Receiving a Change in Funds
 From the Current School Year to the Next School Year**



The proposed policy includes significant new investments. Most schools can anticipate more funding per pupil.

Figure 1



School Group	Number of Schools Increasing Per Pupil	Number of Schools Decreasing Per Pupil
High % Economically Disadvantaged	52	3
Transformation Schools	26	1
Schools With High Teacher Turnover	26	0
Small Schools	64	3

Figure 2

The increased per pupil pattern also continues when looking at specific school types that the RSF project has targeted. On average, each of these school groups see a per pupil increase of \$3,100 to \$3,400 under the draft proposal.

To demonstrate the intended impact on specific student groups, Figures 3 and 4 (below) show the proposed budget's impact on small schools.

There is a relationship between enrollment size and economically disadvantaged within BPS (also a relationship with race). In a weighted student funding system, schools that have classrooms that are filled close to capacity have more flexible funding than schools that have fewer students per classroom (i.e. under enrollment at the classroom level). Schools that serve higher percentages of economically disadvantaged, Black, and Latinx students are less likely to be full and therefore less likely to have as much flexible funding available to the school.

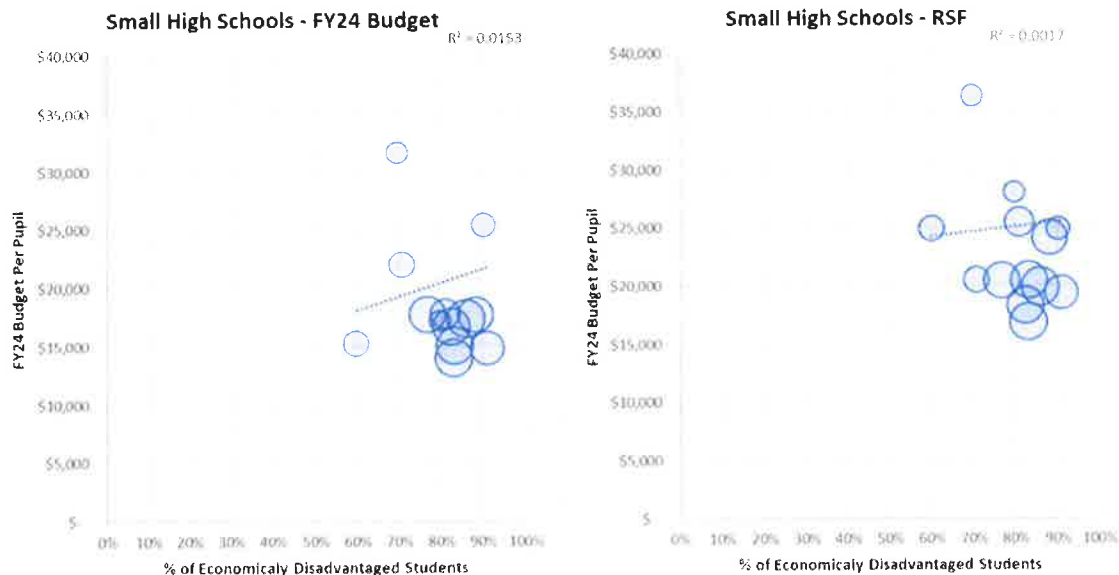


Figure 3

The proposed budget shows improved correlation when broken down the data by grades served and relative size, with both large and small high schools showing improvement.

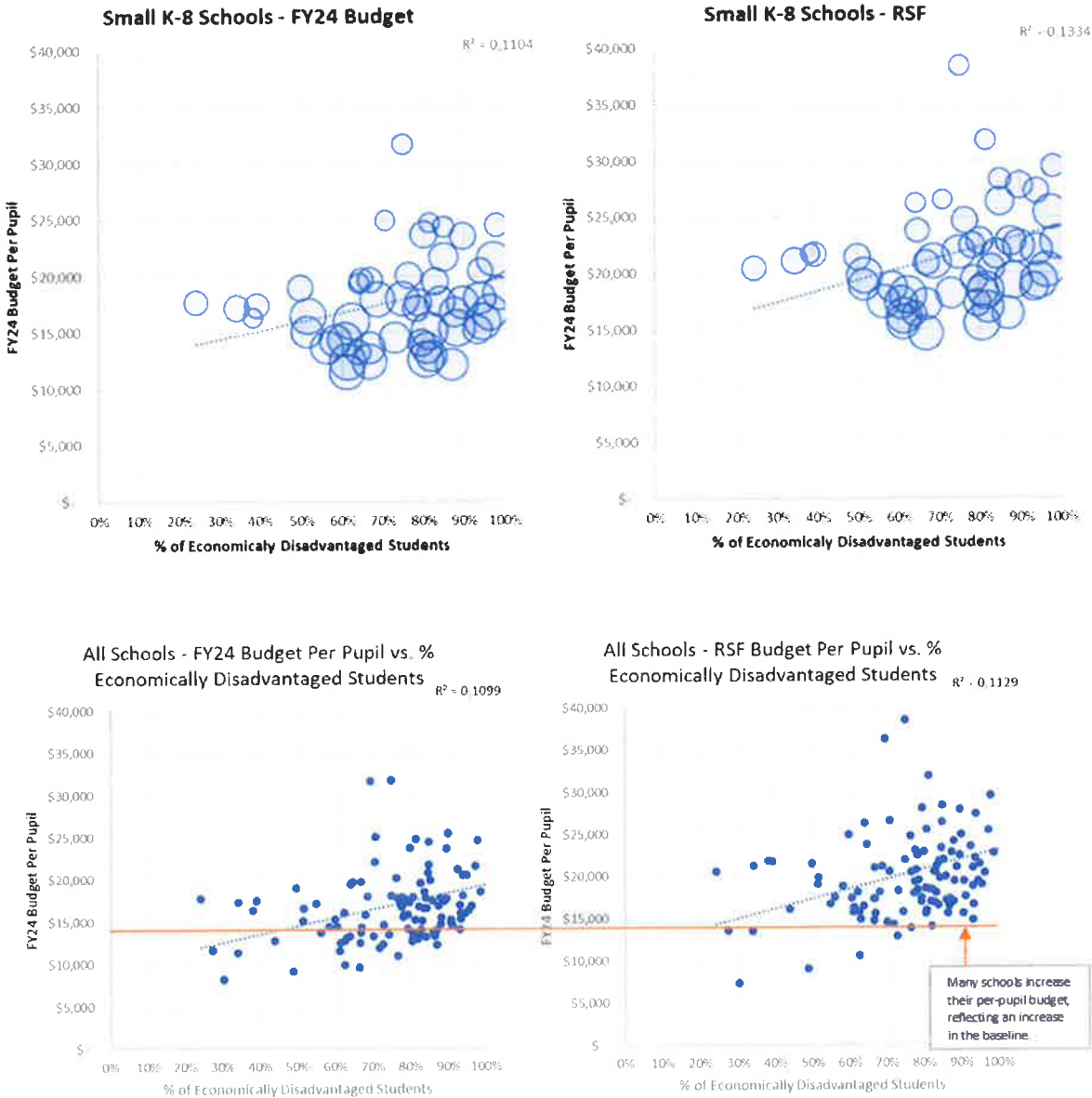


Figure 4
 The correlation between percent of students in poverty and access to more resources has improved from the current funding policy to the draft RSF funding policy with more schools expected to have higher per-pupil funding.



FUNDING USE IMPACT

The intended outcomes of the funding use policy recommendations are to:

- Balance the individual needs of school communities with equitable guarantees of services that students and families can expect at BPS schools.
- Lean into the strength of school leaders to develop innovative strategies and corresponding resourcing plans to support their students, staff, and communities.

Funding Use Rule Recommendation	Intended Impact
<p>The majority of school resources should come as position allocations, so school communities understand what the school’s baseline level of resources could be based on the allocation rules.</p>	<ul style="list-style-type: none"> • Ensures all positions required by law or policy are clearly articulated and are guaranteed. • Eases the administrative burden for school leaders and allows them to focus on equitably serving students through instructional leadership.
<p>The school leader, with community approval through the governing board, school site council, or other mechanism, may reallocate positions or services as long as the plan for adjustments meets the school’s strategy and does not violate any law or policy requirements.</p>	<ul style="list-style-type: none"> • Better equip schools with resources to support academic and behavioral interventions. • Allows for more flexibility for school leaders and can lead to a significant investment in more mutually designed schools that attend to specific needs and desires of a community.
<p>BPS should consider developing a flexibility scale matrix to provide guidance and transparency about which resources can be adjusted and which are more fixed, including what is contractually or legally obligated.</p>	<ul style="list-style-type: none"> • Flexible funding allocations based on per-pupil percentage of students in poverty, with accelerations for schools with exceptionally high percentages of students in poverty would redistribute funds to the highest need groups identified in the Racial Equity Planning Tool.



School leaders should make the majority of hiring and management decisions based on the approved budget allocations. The allocation of a position should not imply centralized management of the particular staff members.

- Enables school leaders to make strategic and responsive hiring decisions in partnership with the community.

Accountability Systems and Considerations

ONGOING ACCOUNTABILITY MECHANISMS

Because the RSF project aimed to reimagine the BPS funding model to more equitably support each child while focusing on BPS students and families that have been historically marginalized, impact checks need to analyze both the whole system and the disaggregated focal student groups intended to be centered in this change. As noted above, the BPS Racial Equity Planning Tool explicitly identifies focal student groups, on whom an initiative's impact must be explicitly considered and named throughout a project, including Black, Latinx, multilingual learners, students with disabilities and economically disadvantaged students as those who have been historically marginalized. The Reimagine School Funding project has taken this accountability responsibility seriously and we anticipate that redistributing funds towards these focal student groups, and others who are equity deserving in the BPS community, will provide supports in the school building for each child to achieve and thrive.

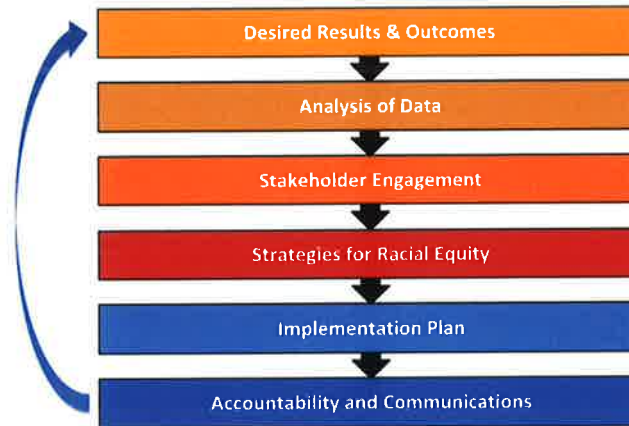
End of project feedback from one Steering Committee member indicated in October 2023 that, "this [new] funding model is focused exactly on the kids that we have to focus on." In order to check that the funding model continues to maintain focus and impact on focal students once implemented, the series of ongoing accountability checks below are recommendations to ensure that its intended impact can be continuously assessed and adjusted.

ACCOUNTABILITY STEPS IN THE BPS RACIAL EQUITY PLANNING TOOL (REPT)

The BPS REPT outlines a set of key steps required for Central BPS teams to hold themselves accountable for meeting the equity outcomes of their initiative and adjusting where necessary.



BPS RACIAL EQUITY PLANNING TOOL COMPONENTS



We focus here on three main components of those accountability measures and how BPS can check in on the intended impact of the new funding design once implemented and report out about it publicly. Those sections are: Strategies for Racial Equity, Implementation Planning, Accountability and Communications. (For more information about the Desired Outcomes, Data Analysis, and Stakeholder Engagement of the RSF Project please see Sections I-III of the report).

STEP 4: STRATEGIES FOR RACIAL EQUITY

Given what we learned from steps #2 and #3, what are our strategies for advancing racial equity?

- Do our strategies address conditions that perpetuate inequities instead of “fixing” students/other people?
- Who may benefit from or be burdened by the proposal? What are potential unintended consequences?
- How could the proposal be modified to enhance positive impacts or mitigate negative impacts?
- Are there complementary strategies that we or our partner(s), can implement?
- How will we collaborate with stakeholders for long-term positive change?
- Are the impacts aligned with our desired outcomes defined in Step #1?

STEP 5: IMPLEMENTATION PLAN

What is our plan for implementation?

- Is the plan realistic and adequately resourced?
- Does it include leaders and personnel who are Black, Latina/o/x, and/or Asian, and bring a racial equity lens?



- Does it ensure ongoing data collection, public reporting, and community engagement?
- If any of these answers is no, what resources or actions are needed, who will perform them and when?

STEP 6: ACCOUNTABILITY & COMMUNICATIONS

How will we ensure accountability, including evaluating and communicating results?

- How will impact be documented and evaluated, including whether we achieve the anticipated outcomes, advance racial equity and close opportunity gaps?
- How are we disaggregating and presenting data to highlight how this strategy is impacting Black, Latina/o/x, Asian, EL, Special Education, and other historically marginalized communities?
- How will we continue to partner and deepen relationships with students, families, and communities of color to make sure our work to advance racial equity is effective and sustainable for the long-haul?

EMBED EQUITY CONSIDERATIONS IN RECURRING BUDGET PROCESSES

The BPS REPT “tool is cyclical...to facilitate evaluation and monitoring” (p. 1) and as such can be embedded in BPS finances regular operating procedures across the fiscal year to ensure there are multiple checks on the impacts of the new funding model. BPS teams can embed accountability checks and continued equity considerations into their regular cycles of work for the Finance Division and across Central Divisions as well to create coherence in BPS funding ensuring equitable funding extends across the district as requested by members of the RSF working groups.

MAKE ADJUSTMENTS TO THE ANNUAL EQUITY ASSESSMENT

BPS currently conducts an annual Equity Assessment as a part of their regular budgeting process. This process recurs annually and reflects BPS aim of ensuring that investments made in the system “balance per pupil equity with a foundation for quality that ensures consistent and high-quality opportunities at all schools” (BPS Equity Analysis FY23, Slide 2).

We recommend they continue the practice of:

- Completing an analysis on per-student spending to evaluate the equity of the BPS budget.
- Replicating year to year methodology to provide greater comparison over time.
- Continuing to analyze overall budget spending data through the lenses of student race and ethnicity (Black, Latinx, White, Asian, Slide 3) and select student demographics (students with disabilities, English language learners, low income, not low income, Slide 4).
- Consider both equity (Slide, 4, 6, 7) and parity (Slide 5) in annual budget analyses.
- Consider per pupil investments in annual budget analyses.



- Ensuring that their analysis continues to demonstrate the successful direction of more resources to high need students over time including the deliberate allocation of resources to students who experience opportunity gaps.

Previous equity analyses are contained in [BPS school committee budget presentations](#).

We recommend several adjustments to continued goals above in the annual Equity Assessment in order to anchor it more deeply in the racial equity goals of the BPS REPT and ground it in the overarching goals of the RSF project. They are:

- **Completing a robust analysis on per-student spending to evaluate the equity of the BPS budget.**
 - › **Equity Expansion:** Expand the Annual Equity Assessment to its own document to analyze the entirety of the BPS budget beyond the incremental funding included previously. This should include all the elements in a school budget and all central office funding targeted towards schools and students.
- **Replicating year to year methodology to provide greater comparison over time.**
 - › **Equity Expansion:** The RSF funding design recommends some significant shifting to monies historically allocated to schools from the Central level and by other means. As pieces of the RSF recommendation are put into place assessment methodologies for checking their impact annually with need to show how:
 - **Processes have changed from previous funding distribution pathways,**
 - ◇ *Consider and Communicate:*
 - *Do our processes address conditions that perpetuate inequities or do they uphold systemic barriers to equitable funding?*
 - *How could our processes be modified to enhance equitable impacts or mitigate inequitable impacts? (Adapted from BPS REPT, p. 14).*
 - **How those dollars have shifted in the new funding design policy in terms of impact, and**
 - ◇ *Consider and Communicate:*
 - *How will impact be documented and evaluated, including whether we achieve the anticipated outcomes, advance racial equity and close opportunity gaps? (Adapted from BPS REPT, p. 14)*
 - **How those shifts are intended to direct monies and resources to meet the goals of the project.**
 - ◇ *Consider and Communicate:*
 - *Are the impacts of the funding shifts aligned with our desired outcomes of the RSF project defined in Step #1 of the BPS RSF Project REPT? (Adapted from BPS REPT, p. 14)*
- **Continuing to analyze overall budget spending through the lenses of student race and ethnicity (Black, Latinx, White, Asian, Slide 3) and select student demographics (students with disabilities, English language learners, low income, not low income, Slide 4).**
 - › **Equity Expansion:** Expand select student demographics to include the focal student groups highlighted in the REPT as central to the work of the RSF project,



show annual spending data disaggregated by race, select student demographics, focal student demographics and cross referenced as well annually. Focal student groups highlighted by the RSF working groups are specifically:

- Students with disabilities
- Multilingual learners
- Multilingual learners with disabilities
- Students who are low-income
- Students who identify as Latinx
- Students who identify as Black
- Students who identify as BIPOC
- Students who are immigrants
- Students who are homeless or housing insecure
- Students who have experienced trauma
- Students who are over-aged and under-credited
- Students who are incarcerated or formerly incarcerated
- Students who are historically lower performing

- **Consider both equity in annual budget analyses.**

- › **Equity Expansion:** The RSF project makes the case for both fixed and flexible investments and decisions made for each grounded in the expertise of systems leaders, schools leaders and community members.

- › *Consider and Communicate:*

- *Do our strategies address conditions that perpetuate inequities instead of “fixing” students/other people?*
- *Who may benefit from or be burdened by the proposal? What are potential unintended consequences?*
- *Is the plan realistic and adequately resourced? (Adapted from the BPS REPT, p. 14)*

- **Consider per pupil investments in annual budget analyses .**

- › **Equity Expansion:** Consider per pupil investments, per classroom investments and per school investments as side by side comparisons in year over year equity reviews. Given the feedback of community members that the intended design of weighted student funding did not always align with the experienced impact of ensuring resources dedicated for specific students made it to the classrooms that served them, setting up systems to compare investments at multiple tiers of the organization can support in showing system barriers and can help show grain size comparisons across the system.

- **Ensuring that their analysis continues to demonstrate the successful direction of more resources to high need students over time including the deliberate allocation of resources to students who experience opportunity gaps.**

- › **Equity Expansion:**



- Consider showing in the Equity Analysis annually not just increased resources being directed toward high need students over time but also how the district is working to align resources and supports toward addressing specific student needs. Flooding students and schools with money and resources without aligned and strategic support for their schools, staff, parents, and the programs that support them will make little effort in disrupting systemic inequities. Ensuring students are funded for all the resources they need and their school, classroom and home environments have the aligned strategic supports to utilize them are part of the continued work of disrupting the inequity. BPS's annual equity analysis can begin to show year over year, how BPS funding and programmatic systems are creating more intentional and aligned coherence in support of BPS's equity goals.

◇ *Consider and Communicate:*

- *How are we disaggregating and presenting data to highlight how this strategy is impacting Black, Latinax, Asian, EL, Special Education, and other historically marginalized communities?*
- *How will we continue to partner and deepen relationships with students, families, and communities of color to make sure our work to advance racial equity is effective and sustainable for the long-haul? (Adapted from BPS REPT, p. 14)*

CREATE A CENTRALIZED SYSTEM FOR COHERENT CROSS SCHOOL INVESTMENT ANALYSIS AND EQUITABLE REDISTRIBUTION

Investments in schools and students happen in a multitude of ways across the BPS system. This is not unusual in a school system as large as BPS and is often the cumulative result of new policies, initiatives, leadership, and funding streams being created in isolation or to serve a singular purpose. For example a Central office may pay for a few additional teachers per school due to a grant designed to serve multilingual learners that then gets carried over indefinitely. Or a set of schools may receive a full time instructional coach as part of a multi-year pilot to improve reading scores and then it becomes a co-teacher model for that school. Or a cluster of schools in a particular zip code may raise significant private funds annually to reinvest in their school annually while those schools further from opportunity are not afforded that privilege nor do they get to share in the extra supports for their students. However, without a consistent lens to view them through and a coordinating system to analyze them, these investments, often created to bolster limited resources and even address an inequity, can build up over time or get repurposed and can end up perpetuating the system-wide inequities they sought to address.

As such, we recommend BPS create a process to identify and analyze the schools that Central prioritizes funds for in all departments across the district.

While intentional investments are a strong path to upending system inequities, and in fact the new funding design uses this theory as its basis, without tracking and assessing all district investments over time, BPS funding as a whole may be in inadvertently creating resource pockets and patterns that perpetuate inequities in the system. This would work against the redesign of the Reimagine School Funding project writ large and as such we



recommend that all district investments go through the same equity analysis and REPT review to ensure that all district funding is working toward BPS’s larger funding equity goals.

Racial Equity Planning Tool: Accountability and Communications

In accordance with the BPS Racial Equity Planning Tool our recommendation is that BPS publicly report the items in the REPT Step 6: Accountability and Communications in these ways at these times:

ACCOUNTABLE COMMUNICATION ACTIONS

With each communication action BPS will:

- Communicate final funding decisions including their intended impact and anticipated outcomes, in advancing racial equity, and more equitably supporting each child to achieve and thrive with a focus on BPS students and families that have been historically marginalized.
- Share data aligned to decisions that is disaggregated and presented to highlight how this strategy is impacting Black, Latina/o/x, Asian, MLL, Special Education, economically disadvantaged, and other historically marginalized communities.
- Outline how BPS will continue to partner and deepen relationships with students, families, and communities of color to make sure the funding policy redesign goal of advancing racial equity is effective and sustainable (Adapted from the BPS REPT).

Timeline from Superintendent Funding Decision	Action
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1 week post	Share final Superintendent funding decisions and schedule discussion with ReImagine School Funding working groups to discussion the final decision in more depth.
1 month post	Have scheduled discussion with RSF working groups about funding decisions, what was included and not, plans to move forward with the tenets outlined, and continue making progress toward ReImagine goals.
6 months post	Outline implementation plans for new funding design to go “live” that have incorporated school leader and community feedback; share with schools, staff and community members impacted by the coming funding design changes.



ACCOUNTABLE IMPACT REPORTING

With each accountable impact reporting milestone BPS will respond to the following impact measures:

- How will impact be documented and evaluated, including whether we achieve the anticipated outcomes, advance racial equity and close opportunity gaps?
- How are we disaggregating and presenting data to highlight how this strategy is impacting Black, Latina/o/x, Asian, EL, Special Education, and other historically marginalized communities?
- How will we continue to partner and deepen relationships with students, families, and communities of color to make sure our work to advance racial equity is effective and sustainable for the long-haul? (Adapted from the BPS REPT)

Possible timelines and actions for responding to those measures are as follows:

Timeline from new funding system launch	Action
1 month before Implementation launch	Share implementation outlines and intended impact with students, schools, staff, and community members impacted by the new funding design.
Launch	Launch new funding design and name shifts those impacted can expect, where they can go for questions and information and forums for community engagements and feedback throughout the first year of implementation
3 months from launch	Have initial implementation feedback rounds with school leaders and regional superintendents about implementation barriers, especially those implicitly or explicitly upholding inequitable systems or blocking the equity goals of the project, and adjust as necessary.
6 months from implementation	Conduct feedback rounds via a variety of methodologies to hear from students, parents, families, community members, staff, school leaders, teachers, and regional superintendents and district staff how the new funding system is being experienced by those most impacted by funding design changes.



Timeline from new funding system launch	Action
1 year from implementation	Conduct a full assessment of year 1 implementation and impact, ensure data collected is system-wide and disaggregated by the focal student groups and schools highlighted as central to the RSF project, reconvene the RSF working groups to consider implementation and impact, assess and adjust for intended impact and equity outcomes.
18 months from implementation	Communicate Year 1 findings, share aligned implementation adjustments, improvements to the funding design, refinements to support increased impact and stronger outcomes, fix implementation barriers and address system-wide inequities. Highlight any new pieces of the original recommendation that will be implemented in the upcoming year.
2 years from implementation	Conduct a full assessment of Year 2 implementation and impact, ensure data collected is system-wide and disaggregated by the focal student groups and schools highlighted as central to the RSF project, reconvene the RSF working groups to consider implementation and impact, assess and adjust for intended impact and equity outcomes.

Timeline from new funding system launch	Action	Timeline from new funding system launch	Action
30 months from implementation	Communicate Year 2 findings, share aligned implementation adjustments, improvements to the funding design, refinements to support increased impact and stronger outcomes, fix implementation barriers and address system-wide inequities. Highlight any new pieces of the original recommendation that will be implemented in the upcoming year.	Year 2 findings, share aligned implementation adjustments, improvements to the funding design, refinements to support increased impact and stronger outcomes, fix implementation barriers and address system-wide inequities. Highlight any new pieces of the original recommendation that will be implemented in the upcoming year.	Continue cycles of implementation as outlined above. Consider how using community-based organizations in the greater Boston area will be implemented in the upcoming year.



COMMUNITY ACCOUNTABILITY MECHANISMS

There has been a significant investment in building trust and transparency in the BPS budgeting process throughout the Reimagine School Funding Process. Prioritizing community members and school leader voice has been integral to the structure and success of the project and it is integral to be accountable.

Throughout the RSF process, community members and school leaders have named that if the new policies are working as intended, we would see:

1. All schools have baseline core academics fully funded.
2. All students have access to physical and mental health services during the school day every day.
3. A desire for all students to have access specials and extracurriculars.
4. An infrastructure for School Site Councils and Equity Roundtables reflected in increased capacity, participation, and partnered decision-making.

Below, there are suggested structures for hearing from community members if the reimaged funding policy is working as intended.

RECURRING COMMUNITY FEEDBACK FORUMS

To ensure the budgeting system remains responsive to the community, forums for continuous feedback and structured discussion must be explicitly created. These spaces should be anchored in the principles of inclusion and belonging, should center students, families and BPS community members most impacted by the budget, should have multiple, meaningful ways for BPS community members to offer feedback on the impact of the new funding design. This can include but is not limited to:

- Establishing a committee of community members that meets regularly to assess impact on BPS the students, with specific disaggregations for the focal student groups outlined as central to the project by the Steering Committee specifically:
 - › Students with disabilities
 - › Multilingual learners
 - › Multilingual learners with disabilities
 - › Students who are low-income
 - › Students who identify as Latinx
 - › Students who identify as Black
 - › Students who identify as BIPOC
 - › Students who are immigrants
 - › Students who are homeless or housing insecure
 - › Students who have experienced trauma
 - › Students who are over-aged and under-credited
 - › Students who are incarcerated or formerly incarcerated
 - › Students who are historically lower performing



- A bi-annual feedback form, modeled after the RSF form, that checks for impact at the student, family and school leader level.
- Bi-annual visits to parent and community advocacy meetings citywide to discuss budget implications and limitations with community members directly and share disaggregated student data.
- A small set of longitudinal questions added to the annual BPS survey that assesses the impact of the new budget design over time on communities most directly impacted.
- A small set of longitudinal questions added to recurring school leader and regional leader BPS surveys that assesses the impact of the new budget design over time and any implementation barriers school leaders face in the new design.
- A long term study conducted in partnership in the broader Boston academic community to consider how the funding recommendations impact student populations, what the impact of the new funding policy is on the BPS system writ large, and how BPS’s new program models and funding models intersect and interact to impact students and the broader BPS community.
- A recommendation to replicate the model of community engagement via the Community Steering Committee and Principal working group for other Finance Division initiatives.

Additional Supports and Considerations

STAFF AND SCHOOL SUPPORTS

Funding Use Rule Recommendation	Staff and School Supports
<p>The majority of school resources should come as position allocations, so school communities understand what the school’s baseline level of resources could be based on the allocation rules.</p>	<ul style="list-style-type: none"> • <i>Central office staff should take the lead on all compliance checks prior to the collab process. This will support school leaders to focus on resourcing plans to increase student achievement rather than compliance requirements.</i>



Funding Use Rule Recommendation

Staff and School Supports

The school leader, with community approval through the governing board, school site council, or other mechanism, may reallocate positions or services as long as the plan for adjustments meets the school's strategy and does not violate any law or policy requirements; If funds are redirected to services or a position with a lower average salary than that of the allocated position, the school shall receive the amount of funds that equals the average salary of the allocated position.

- *Schools should be supported by School Site Councils or Governing Boards, which all schools should have, as a structure to build capacity and support school leader budgeting decisions. A process for shared decision-making of adjusted position allocations should be determined.*

BPS should consider developing a flexibility scale matrix to provide guidance and transparency about which resources can be adjusted and which are more fixed, including what is contractually or legally obligated.

- *An on-going budget advisory group, similar to the Steering Committee, should be established at the district level to guide BPS budgeting priorities and process.*

School leaders should make the majority of hiring and management decisions based on the approved budget allocations. The allocation of a position should not imply centralized management of the particular staff members.

- *Encourage school leaders to participate in professional learning communities where they can collaborate with their peers, share best hiring practices, and learn management strategies from one another.*

SCHOOL PROFILES

The new funding design helps to ensure we are building toward our BPS school profiles of the future and sets us on a path to ensuring clear rules for how resources get assigned to schools that are transparent to the broader BPS community. It helps us create system-wide goals and outlines prioritized guidance for what the community wants to see in BPS schools for BPS students to thrive and outlines what BPS staff need to make that vision become a reality. This roadmap helps us prioritize our funding investments over time to enable these school profiles to fully come to life and to do so in a way that enables that funding to stay stable over time.

Of note there are BPS schools who are funded via alternate methods for a variety of reasons. Those schools will not be fully subject to the new funding design policy and are noted below. The budget process and transparency recommendations would still pertain to these schools.



- Carter School
- Mel King Schools
- Horace Mann School

FUTURE CONSIDERATIONS

The Reimagine School Funding project surfaced many areas for re-design in the budget process and funding policy. Working group members surfaced potential innovations and considerations that did not make it into the current version of the recommendation but should be considered as potentially impactful policies that may move BPS closer to achieving the goals of an equitable school system. At minimum, each of the listed considerations should be discussed for further study.



Accountability Checks

BPS and the RSF project are accountable to its constituents. As previously stated in this report, the RSF project recommends formalizing the Steering Committee as a new system for authentic community engagement. The infrastructure for monthly meetings, community requests of data sets, and financial compensation of time have already been established. Continuing this engagement structure will support the BPS in the future when they embark on impact checks of the RSF project in future years.

Classroom-based Instructional Allocation

BPS should consider moving to a true classroom based allocation model - including general education, inclusion, and sub-separate teachers and aides. This funding policy consideration is a more expansive and inclusive budget model that allows schools and the BPS system to be more responsive to student, school and community needs.

Tailoring Supports for Transformation Schools

AFTON and UPD Consulting completed a Systemic Improvement Plan (SIP) analysis of funding in Transformation Schools in the Fall of 2022. The SIP analysis surfaced that transformation schools receive more per pupil funding than comparable schools, on average. However, when compared to Non-Transformation School leaders, the analysis showed that, on average, Transformation School leaders have fewer years of experience in their leadership roles leading to spending inefficiency.

The engagement in the RSF project surfaced that transformation school leaders and central office staff feel that they are in competition for talent with other schools in the district. As a future policy, BPS may consider prioritizing and financially incentivizing high quality teaching staff and leadership to work at schools with Transformation Schools via increased salary or stipends.

Multi-Year Budgets

During working group meetings, BPS central office staff, school leaders, and community members considered the benefits of multi-year budgets for schools, rather than single-year budgets. This may allow for longer term planning and diminish the need, effort and time for redoing budgets annually.

ALREADY ALIGNING SUPPORTS WITHIN BPS

Funding is only one aspect of resource equity and all dimensions of resource equity are connected. Many frameworks consider the connections between academic supports, facilities, personnel supports, interventions, funding and all the other dimensions and these connections were highlighted throughout the Reimagine School Funding Project frequently using the Dimensions of Resource Equity Framework developed by the Alliance for Resource Equity.

In the face of a multitude of high priority and important initiatives and a series of city and state requirements, BPS has been working to align these supports already. Connected worked supported by the better aligned, more equitable BPS funding but outside the direct scope of the RSF project include but are not limited to:

- A District-wide shift to an inclusive Instructional Model
- New Program Models for Inclusion Designed with Schools Communities

- Multi-tiered Systems of Support for Students
- Tiered Supports for School Leaders and Regional Support Staff
- The Green New Deal

We encourage BPS to continue to utilize these resources and others across Central office departments to make more explicit the connections between resources spent and the district priorities that it supports.



VI. Appendix

Facilitators & Members

STEERING WORKING GROUP MEMBERS

Name	Role	Affiliation
Roxi Harvey	Parent / Advocate	SPED PAC
Suzanne Lee	Community Advocate / Former Quincy School Leader	EL Taskforce
Dan French	(Former) Executive Director of Center for Collaborative Education	OMME Recommendation
Lisa Gonsalves	UMass Boston	OAG Taskforce
Karim Elrazzaz	The Islamic Society of Boston - Community Program Manager	DELAC
Jenny Marcelin	Parent / Advocate	DELAC
Jonathan Reovan	Parent / Advocate	SPED PAC
Jun Xie	Parent/Advocate	DELAC
Lisa Jeanne Graf	Parent/Advocate	SPEC PAC
Suleika Soto	Parent	Citywide Parent Council
Hajar El Ayoubi	Student	BSAC
Dorion Levy	Student	BSAC

PRINCIPAL WORKING GROUP MEMBERS

Name	Role	School
Richard Chang	School Leader	Quincy Upper School
Danielle Costello	Operational Administrator	Hernandez & Umana
Traci Walker Griffith	School Leader	Eliot
Hai Son	School Leader	Mather Elementary School
Meghan Welch	School Leader	Sumner
William Thomas	School Leader	New Mission High School
Lee Franty	Budget Administrator	Murphy K-8 School
Geoffrey Walker	School Leader	Fenway High School
Katie Grassa	School Leader	Curley K-8
Joanna Cruz	School Leader	Samuel Adams



Emily Spoviero	School Leader	O'Donnell
Kristen Goncalves Redden	School Leader	PJ Kennedy
Andrew Bott	School Leader	Brighton
Sidney Brown	School Leader	Madison Park Technical Vocational High School
Walter Apperwhite	School Leader	William Monroe Trotter
Rebecca Gadd	School Leader	BTU Pilot
Lauren Clarke-Mason	School Leader	BTU Pilot

FUNDING POLICY DESIGN WORKING GROUP MEMBERS

Name	Role	Affiliation
Ethan D'Ablemont	Assistant Superintendent Inclusive Education	Inclusion
Robert Bardwell	Executive Director of MssCore	Mass Core
Karen Book	PandA	Finance
Julia Bott	Executive Direct of Inclusion	Inclusion
Blair Dawkins	Asst Director	Transportation
Dan French	Executive Director at Center for Collaborative Education	Steering Rep
Lisa Jeanne Graf	Steering Committee Rep	Steering Rep
Keith Hellmund	PandA	Finance
Katie Kline	Special Projects Manager	Finance
Nate Kuder	CFO	Finance
Serena La Roque	Budget Director	Finance
Kristen Leathers	Multilingual Instructional Coach	OMME
Ted Lombardi	School Superintendent	Mass Core
Chris Panarese	Assistant Director	Sped
Jamie Racanelli	PandA	Finance
Steven Ramirez	Budget team	Finance
Daniella Reyes Saade	PandA	Finance
Patti Tao	School Scheduling	Finance



Name	Role	Affiliation
Stephanie Toledano	Multilingual Instructional Coach	OMME
Isa Welch	OMME	OMME
Tommy Welch	School Superintendent	Academic Supt.
Faye Karp	Executive Director	OMME
Ignacio Charparro	Dir of E&A	OMME

CONSULTING PARTNERS

Name	Role	Affiliation
Carrie Stewart	Managing Partner	Afton Partners
Katie Reed	Partner	Afton Partners
Kevin Wenzel	Senior Director	Afton Partners
Mollie Foust	Director	Afton Partners
Daniel Hegner	Senior Associate	Afton Partners
Lindsay Shanahan	Senior Associate	Afton Partners
Cole Chilla	Principal Consultant	UPD Consulting
Adha Mengis	Senior Consultant	UPD Consulting

Detailed Data Analysis

A number of different analyses were conducted throughout the ReImagined School Funding Project. Some of the questions the group sought to better understand included, but were not limited to, the following:

1. How has Boston Public Schools student enrollment changed over time?
2. How has Boston Public Schools budget changed over time?
3. How are student academic outcomes varied across race?
4. How are student academic outcomes varied across student type?
5. How are student academic outcomes varied across student type and race?
6. Are there correlations between academic growth and school per-pupil funding levels?
7. Are there correlations between academic growth and school per-pupil funding levels, by race?
8. Are there correlations between academic growth and school per-pupil funding levels, by student type?
9. How does the Boston Public Schools community including parents, teachers, students, etc. feel about the budget process and allocation of resources?



To view all the data analysis that was completed, please see the linked [presentation](#). Additionally, the slides in which these were presented to and discussed across working groups can be found on the BPS Reimagine School Funding [website](#).

Example Allocation Policies

BEST PRACTICE GUIDANCE FOR SPECIFIC RESOURCES

Resource	Best Practice Guidance
Nurse	<p>MA Dept of Public Health: 1.0 FTE per 250-500 students</p> <p>National Association of School Nurses:</p> <ul style="list-style-type: none"> • All students have access to registered nurse all day every day. • Other factors to use in determining ratios include: social determinants, acuity levels, community/school infrastructure, other responsibilities, barriers to care, use of technology. • Recommend workload model rather than caseload model. <p>BPS currently has a ratio of 1.0 FTE for every 337 students.</p>
School Psychologist	<p>National Association of School Psychologists: 1.0 FTE per 500 students</p> <p>BPS currently has 1.0 FTE for every 546 students on school budgets. If including centrally managed psychologists, BPS has a ratio of 1.0 FTE for every 478 students.</p>
Social Worker	<p>National School Social Worker Association: Recommends a general ratio of 1:250 students depending on the characteristics and needs of the student population served. Students with intensive needs would require a lower ratio.</p> <p>BPS currently has a ratio of 1.0 FTE per 275 students, excluding social workers specific to SLIFE and EI. In total FTEs, BPS has a ratio of 1.0 FTE per 227 students.</p>
Guidance Counselor	<p>American School Counselor Association: ASCA recommends a 250-to-1 ratio of students to school counselors, the national average is actually 408-to-1 for SY21-22.</p> <p>BPS currently has a ratio of 1.0 FTE per 386 students (using all students, not just secondary students).</p> <p>BPS currently has a ratio of 1.0 FTE per 127 secondary students (grades 9-12).</p>



Resource	Best Practice Guidance
Family Liaison	There is no national standard or unit for family and community engagement.
Community Field Coordinator	There is no national standard or unit for family and community engagement.
Second Administrators	No national standards exist on school-based administrative positions.
Secretary/Clerk	No national standards exist on school-based administrative positions. BPS currently has a ratio of 1.0 FTE per 340 students. This does NOT include program-specific clerks.
School Leaders	No national standards exist on school-based administrative positions.
Lunch Monitors	Lunch monitors are budgeted at 1.0 FTE per 90 K-6 students.

REPT

The BPS Racial Equity Planning Tool lays out a clear six-step process to operationalize this commitment to ensure each decision we make is aimed at closing opportunity gaps and advancing racial equity. The toolkit presents resources to guide the development, implementation and evaluation of significant policies, initiatives, programs, professional development, instructional practices and budget decisions. Advancing equity requires ending individual, institutional, and structural racism and bias, and deliberately, thoroughly, and consistently applying a rigorous equity lens to our work. To foster a barrier-free environment where all students, regardless of their race or ethnicity, have the opportunity to achieve, we must disrupt status quo methods of decision-making, differentiate resource allocations, include community voice, and provide the support and authentic opportunities students need to thrive. The [REPT documentation](#) for the RSF project can be found here.

Engagement Report

The goals of the [BPS Engagement Report](#) are to share the insights Afton and UPD have gathered with the Reimagine School Funding working groups, BPS staff, the school committee to inform their exploration into new and more equitable school funding policies. The report has been released in multiple stages to include community, parent, student, educator, and BPS staff engagement throughout the 18 month project.







