



Illinois State Board of Education

EBF Spending Plan

Reporting Updates and Instructions for FY 2024

May 30, 2023

This webinar will be recorded and posted at
www.isbe.net/ebfspendingplan, where you can also find other EBF
Spending Plan resources

Equity • Quality • Collaboration • Community

Agenda

- I. Context for the Redesigned Spending Plan
- II. Navigating and Completing the Spending Plan
- III. Additional Resources

Evidence-Based Funding for Student Success Act

- **REQUIRES** each Organizational Unit (school districts, laboratory schools, ROEs, and ISCs) to complete spending plan that describes:
 - I. How it will improve student achievement and make progress toward state education goals
 - II. How it will utilize EBF
 - III. How EBF \$ specifically allocated for English Learners, special education, and low-income students will be spent



The EBF Spending Plan will now be completed within the budget form (for school districts) or via a standalone template (for all other organizational units). ISBE publishes district budgets and will publish stand-alone EBF Spending Plan responses from other Organizational units.

Background – ISBE's Strategic Plan

2.2.2 Educate advocates, stakeholders, and LEAs regarding equitably designating funds to focus on specific student populations, including birth-to-5, English Learners, special education, and low-income, resulting in diminishing achievement gaps.

- **2022 Metric:** ISBE will have convened an advisory group to establish a value proposition and guide integration of the EBF Spending Plan into other required plan(s) for maximum resource allocation alignment and benefit for identified student groups.

Advisory Membership

- Representative of organizational unit diversity (size, region, student demographics), with personnel holding program and finance roles included.
- Advocacy stakeholders spanning student groups and professional organizations
 - Including: Illinois Association of School Business Officials, Illinois Federation of Teachers, Illinois Alliance of Administrators of Special Education, Association of Illinois Rural and Small Schools, Illinois Advisory Council on Bilingual Education

- **2023 Metric:** By the end of the 2022-23 school year, the EBF Spending Plan revision will be completed and available for use.



Thank You Advisory Group Members!

Evidence-Based Funding Spending Plan Redesign - Original Advisory Group Membership		
Name*	District/ Organization(s)	Title
David Ardrey	Association of Illinois Rural and Small Schools	Executive Director
Eulalia Valdez	Berkeley School District 87	Director of English Learning
Linda Matkowski	Champaign Community Unit School District 4	Chief Financial Officer
Jennifer Porter	Community Unit School District 300	Chief Financial Officer
Stuart Parks	Grand Prairie Community Consolidated School District 6	Superintendent
Judy Sauri	Illinois Association of Multilingual Multicultural Education	President
Jorge Macias	Chicago Public Schools, Illinois Advisory Council on Bilingual Education	Chief, Office of Language and Culture Education
Michael Jacoby	Illinois Association of School Business Officials	Executive Director/CEO
Carolyn McCarty	Illinois Parent Teacher Association	President
Cyndi Sidor	Oak Park and River Forest District 200	Chief Financial Officer
LaShanta Williams	Rock Island-Milan School District 41	EL/Bilingual Coordinator
Dirk Muffler	Regional Office of Education 40	Director of Adult and Alternative Education
Michelle Mueller	Regional Office of Education 40	Regional Superintendent of Schools
Dr. Pamela Kibbons	Round Lake Community Unit School District 116	Assistant Superintendent of Business
Jon Baricovich	Summit School District 104	Director of Languages
Troy Whalen	Summit School District 104	Superintendent
Heather Wendell	Chicago Public Schools, Professional Review Panel	Chief Budget Officer
Elizabeth Degruy	Community Consolidated School District 59, Illinois Alliance of Administrators of Special Education	Executive Director of Educational Services
Ron O'Connor	Community Consolidated School District 59	Assistant Superintendent of Business Services
Nicole Pieranunzi	West 40 Intermediate Service Center	Director of Special Education Services
Kristin Dunker	Vermilion Association for Special Education	Director of Special Education
Lea Anne Frost	Park Ridge-Niles School District 64	Director of Student Services
Cynthia Riseman Lund	Illinois Federation of Teachers, Professional Review Panel	Legislative Director
Scott Hogan	Tri-County Special Education Association	Executive Director
Ryan Linning	Dimmick Community Consolidated School District 175	Superintendent

*Advisory group members are listed by their positions as of the inception of the group.



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Advisory Process

Project Scope

- Identify the value proposition
- Determine a place of integration
- Align plan content with value proposition

Convenings

- Monthly beginning winter of 2021-22
- Presentations from key ISBE staff to provide background knowledge
- Input on each iteration of the revised plan



Value Proposition – The EBF Spending Plan will Primarily Serve to.....

Inform resource allocation decision-making for state dollars and identified student groups (ELs, SPED, low-income) by incorporating the spending plan within broader financial planning processes.

Support Organizational Units in effective engagement of data-driven needs assessments in planning support for student groups most in need.

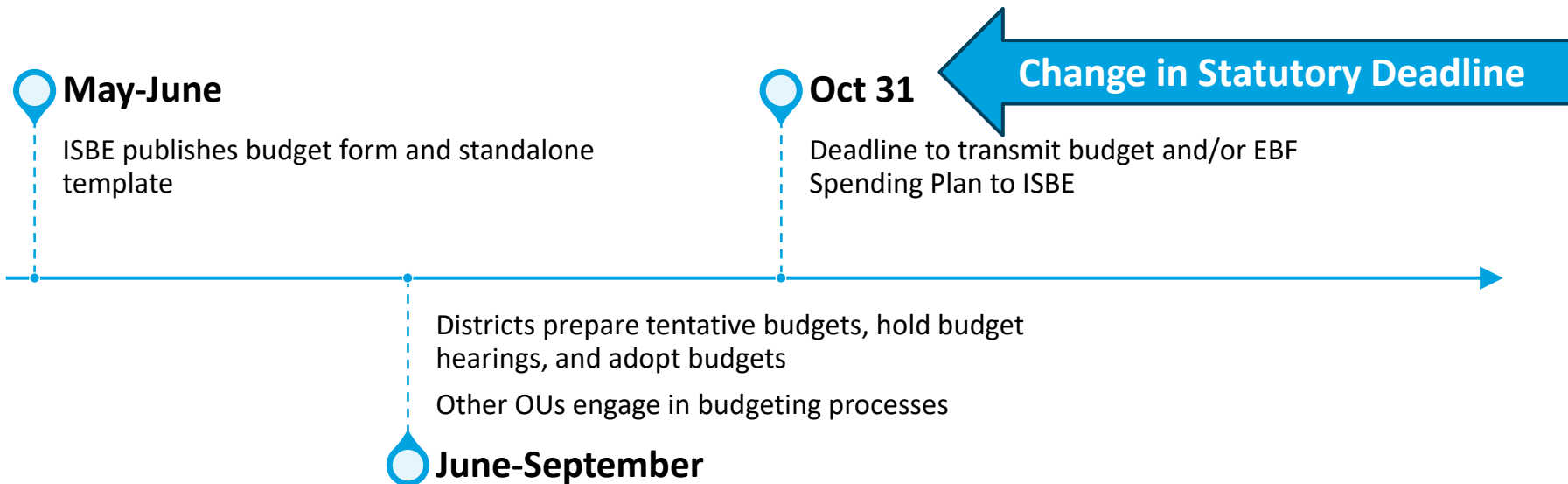
Promote fiscal and academic alignment by encouraging conversation between programmatic and financial leaders.

Support analysis of the relationship between student outcomes and financial resources for Organizational Units and communities.

Placement in the Budgeting Process

- ✓ Consistent with statute
- ✓ Supports planning for state dollars alongside all revenue streams; consolidates a reporting requirement for school districts
- ✓ Provides efficient opportunity to communicate priorities for EBF
- ✓ Leverages transparency of budget process

Updated Annual Timeline



School districts are encouraged, but not required, to integrate draft spending plan responses in the tentative budget process and public hearings.



Agenda

I. Context for the Redesigned Spending Plan

II. Navigating and Completing the Spending Plan

III. Additional Resources

Anticipated Budget Form Release: June 5

A spending plan template is currently available for review at
<https://www.isbe.net/ebfspendingplan>

Spending Plan Outline – Consistent Structure and Content

Part I: Strategies to Achieve Student Growth and State Education Goals

- Goals for student success
- Strategies for achieving growth/progress toward goals

Part II: What will you do with Evidence-Based Funds?

- Data sources consulted to determine need
- Stakeholders included in decision making
- Investments from tier funds

Part III: Support for Special Student Groups

- Student group investments (specific to districts)
- Assurances (for EL funds)

Most items continue to allow for selection of response from a provided list.



Navigating the EBF Spending Plan

- Both the budget form and the standalone template have a cover page. Select the name of your Organizational Unit on the cover page before completing the spending plan.

Please select your Organizational Unit's name below. Certain figures in the spending plan template will populate based on this selection.

Organizational Unit Name:	
RCDT:	Please select from drop down list in row 9

< > Cover Page (Start Here) FY24 EBF Spending Plan +



Item Types

Color Key	Text or dollar figure entered by user.
	Response selected from dropdown list
	Value is provided based on district selection.



Collaboration Opportunities

Collaboration Opportunity - Organizational Units may find that questions in this section are most easily and effectively completed through collaboration between program leaders affiliated with each student group and finance leaders.

- Throughout the plan, there are suggestions for collaboration.
- Inclusion in the public budget provides a new opportunity for stakeholder consultation and internal collaboration.
- The spending plan asks questions that draw on the knowledge and expertise of program and finance leaders.

For example, funding provided for English learners can grow through Tier Funding distributions. Bilingual directors can support the evaluation of existing investments with these funds, share information about existing stakeholder consultation processes, and contribute to discussions about how to budget new funding dedicated to English learners. This can inform how the Organizational Unit responds to several questions within the EBF Spending Plan.

Completion Tracker

140			
141	Spending Plan Completion Tracker		
142	Use the information below to confirm completion of all required questions. Note that the "status" column adjusts to responses, so the tracker is most helpful to consult <u>after</u> you have completed the spending plan.		
143	Question	Status	Acceptance Criteria
144	Part 1, Q1	Incomplete	Character length of response must be >10 and <=2000, including spaces.
145	Part 1, Q2	Incomplete	A <u>different</u> response must be selected in G11, I11, and L11; cells cannot be blank.
146	Part 1, Q2 (Narrative)	Complete	Response required only if "Other" selected in G11, I11, or L11; character length of response must be >10 and <=1000, including spaces.
147	Part 2, Q1	Incomplete	A numeric value must be entered in cell G31 (estimated or actual Tier Funding, or 0 if appropriations did not include Tier Funding). A type must be selected in cell H31.
148	Part 2, Q2	Incomplete	A <u>different</u> response must be selected in G35, I35, and L35; cells cannot be blank.
149	Part 2, Q3	Incomplete	At least one response must be selected.
150	Part 2, Q4	Incomplete	Cells G43, I43, and L43 cannot be blank. "Other" may be selected more than once, but other responses may not be repeated.
151	Part 2, Q4 (Narrative)	Complete	Response required only if "Other" selected in G43, I43, or L43; character length of response must be >10 and <=1000, including spaces.
152	Part 2, Q5 (Cell G90)	Incomplete	Cell G90 must be equal to the value in cell G31.
153	Part 2, Q5 (Narrative)	Complete	Response required only if a value was entered in cell G89; character length of response must be >10 and <=1000, including spaces.
154	Part 3, Q1 Low-Income Funds	Incomplete	A numeric value must be entered, which may be "0" if the organizational unit received no funding for the specified student group. A type must be selected in cell H100.
155	Part 3, Q1 English Learner Funds	Incomplete	A numeric value must be entered, which may be "0" if the organizational unit received no funding for the specified student group. A type must be selected in cell H101.
156	Part 3, Q1 Spec. Ed. Funds	Incomplete	A numeric value must be entered, which may be "0" if the organizational unit received no funding for the specified student group. A type must be selected in cell H102.
157	Part 3, Q2	Incomplete	At least one response must be selected.
158	Part 3, Q2 (Narrative)	Complete	Response required only if "Other Investments" was selected in the previous question; character length of response must be >10 and <=500, including spaces.
159	Part 3, Q3	Incomplete	At least one response must be selected.
160	Part 3, Q3 (Narrative)	Complete	Response required only if "Other Investments" was selected in the previous question; character length of response must be >10 and <=500, including spaces.
161	Part 3, Q4	Incomplete	At least one response must be selected.
162	Part 3, Q4 (Narrative)	Complete	Response required only if "Other Investments" was selected in the previous question; character length of response must be >10 and <=500, including spaces.
163	Assurances 1	Complete	Response required if the value entered in cell G101>0.
164	Assurances 2	Complete	Response required if the value entered in cell G101>0.
165	Assurances 3	Complete	Response required if "Yes" selected in cell E133.
166	Assurances 4 (Meeting Date)	Complete	Response required if "Yes" selected in cell E133; enter date in MM/DD/YYYY format.
167	Assurances 4 (Name of Chair)	Complete	Response required if "Yes" selected in cell E133.
168			

Review after you believe you have completed all required questions.



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Guidance Document

In addition to this webinar, ISBE has prepared a guidance document with step-by-step instructions, and an appendix with additional context. This document will be published today on the EBF Spending Plan webpage.

However, the revised plan is intended to be simple and intuitive to complete. Most users will be able to complete the plan without reading the additional guidance document.

Part I – Achieving Student Growth

Part I: Achieving Student Growth and Making Progress Toward State Education Goals

The questions below allow you to indicate the strategic priorities and strategies that will drive your efforts to achieve student growth and make progress toward state education goals. These may involve investing in any combination of an Organizational Unit's core resources: time, money, people, and programs.

Collaboration Opportunity - Organizational Units may find that Part I is most easily and effectively completed if led by program leaders in consultation with finance leaders.

1) What are the Organizational Unit's strategic goals for student success for the 2023-24 school year? What measures will be used to evaluate progress? (No more than 2000 characters, including spaces.)

2) Select the top three strategies that the Organizational Unit will employ to achieve student growth and make progress toward state education goals. (Select three *different* responses from the dropdown list.)

Top Strategy 1	Top Strategy 2	Top Strategy 3
Maintain or decrease class sizes	Increase number and/or quality of professional development opportunities	Other

If "Other" was selected in question 2, please describe. (No more than 1000 characters, including spaces.)

Required



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Part II – Planned Use

Part II: Planned Use of Evidence-Based Funding

The questions below provide an opportunity to document the stakeholders with whom you consulted and the data you analyzed as you determined your strategic allocations of FY 2024 EBF dollars. Key statistics related to EBF distributions are provided for your reference. Form 50-36/50-39 is typically released before current-year appropriations are known. Therefore, the figures provided are for the prior fiscal year.

Collaboration Opportunity - Organizational Units may find that questions in this section are most easily and effectively completed if led by finance leaders in consultation with program leaders.

Evidence-Based Funding Organizational Unit Results (FY 2023)	Final Resources / Adequacy Target = Percent of Adequacy	Average Student Enrollment	1,915.00	Adequacy Target	\$31,632,757.06
		Final Resources	\$14,179,163.75	Percent of Adequacy	45%
	Base Funding Minimum + Tier Funding = Gross State Contribution	Tier Assignment	1	Gross State Contribution	\$14,353,624.69
		FY23 Base Funding Minimum	\$11,015,888.05	FY 2023 Tier Funding	\$3,337,736.64
	Within FY 2023 Gross State Contribution, Resources Attributable to Specific Populations	Low-Income Students	\$942,788.72		
		English Learners (Els)	\$258,564.43		
		Special Education	\$415,398.65		

- Summary data from prior year distributions are provided for reference
- Current-year amounts are not known at the time the budget form is released
- Organizational units may complete the plan with the knowledge that Tier Funding is available for FY24.



Part II – Current-Year Tier Funding

29			
30		FY 2024 Tier Funding	Funding Type (Select)
31			
32	1)	FY 2024 Tier Funding Allocation*: Enter the dollar amount of Tier Funding allocated to the Organizational Unit within the FY 2024 Gross State Contribution. Enter "0" if current-year appropriations did not include Tier Funding. Select whether the amount is estimated or actual funding.	\$75,000.00 Estimated
33			

- Enter the amount of Tier Funding for the current year
- Select the funding type – Estimated or Actual
- Organizational Units are encouraged to update the spending plan with actual funding amounts prior to transmission to ISBE, if those amounts are known at the time of transmission
- Organizational Units will also be asked to show intended use of Tier Funding later in the plan

EBF distribution files are typically released in early August.

Part II – Data Review and Stakeholder Consultation

34					
35	2)	Select the <u>top three</u> sources of data used to inform the Organizational Unit's planned allocation of EBF dollars. (Select three different responses.)			
37	3)	Indicate with which groups the Organizational Unit engaged to inform its intended allocation of EBF dollars. (Select any that apply; otherwise leave blank.)	Bilingual Program Director(s)	Principals	Bilingual Parent Advisory Committee
38			Special Ed. Program Director(s)	School Improvement Teams	Other Parent Group(s)
39			Other Program Leaders	Teacher or Support Staff Unions	Community Focus Group(s)
40			School Board Members	Other School Staff	Other
41		[Optional] Provide a brief description of the Organizational Unit's process for consulting with internal and external stakeholders in determining the allocation of EBF dollars. (No more than 1000 characters, including spaces.)			

- Questions 2 and 3 broadly align with steps in a needs assessment (e.g., what data was reviewed, and which stakeholders were consulted in developing the spending plan?).
- Responses are selected from a list, with the ability to indicate "Other" as needed
- Optional space to elaborate on the process is provided.

Part II – Use of Base Funding Minimum

42		Priority Investment 1	Priority Investment 2	Priority Investment 3
43	4) Given the data analyzed, the stakeholders consulted, and the priorities identified in Part I, indicate the <u>top three</u> priority investments the Organizational Unit will make with its FY 2024 Base Funding Minimum (e.g., excluding Tier Funding). Choose "Other" if investments do not match the provided list. (Select three different responses. "Other" may be selected more than once if needed.)	Core Teachers	Specialist Teachers	Instructional Facilitator
44	If "Other" was selected in question 4, please describe. (No more than 1000 characters, including spaces.)			
45				

- Question 4 asks Organizational Units to indicate priority investments with Base Funding Minimum dollars (e.g., before factoring in new Tier Funding, if available)
- Responses are selected from a list, and the list includes the 34 cost factors in the state funding formula
- "Other" may also be indicated

EBF Cost Factors – A Framework for Describing Investments

*The EBF Spending Plan contains several questions that ask Organizational Units to indicate planned investments with state funds. Rather than providing a list of general investment categories, the **FY 2024 EBF Spending Plan uses the funding formula's 34 cost factors as a framework for describing planned investments.** These investment categories represent common drivers of district spending, such as costs related to staffing, substitutes, central office services, special education programming, etc. The inclusion of the cost factors as a framework for describing investments is meant to increase awareness of how the funding formula determines adequacy and inform productive local dialogue about resource allocation.*



Caveats

- EBF is largely unrestricted. The cost factors represent possible, but not required, investments.
- Some common expenditures, such as for transportation or food service, are not represented by any cost factor. The spending plan allows for the selection of "Other" when investments do not align with any cost factor.

The EBF Guidance document contains statutory definitions for each cost factor, along with suggestions for determining alignment with planned investments.



Part II – Cost Factor Table

- Question 5 is known as the "Cost Factor Table."
- It asks Organizational Units to indicate planned investments with Tier Funding, using the 34 Cost Factors as a Framework
 - This is required for all OUs that receive at least \$5,000 in Tier Funds
 - The table asks for dollar amounts of investments, and the total must be equal to the Tier Funding amount you entered in Question 1.
- It OPTIONALLY provides space to indicate total budgeted expenditures for each cost factor from all revenue sources

Getting Oriented to the Table

Investments in Adequacy
Target for Each Cost Factor

Required if Tier Funding >= \$5,000

Cost Factors		Amount in FY 2023 Adjusted Adequacy Target	Budgeted FY 2024 Investments with New Tier Funding [Required]	Budgeted FY 2024 Expenditures (All Resources) [Optional]	Optional District Narratives
Core Investments	Core Teachers	\$6,945,572.68			Enter optional context for core investment decisions.
	Specialist Teachers	\$2,110,063.39			
	Instructional Facilitator	\$765,894.29			
	Core Intervention Teacher	\$273,234.70			
	Substitute Teacher	\$262,438.93			
	Guidance Counselor	\$652,089.78			
	Nurse	\$163,180.44			
	Supervisory Aide	\$279,251.84			
	Librarian	\$284,155.69			
	Librarian Aide	\$191,366.99			
	Principal	\$424,327.68			
	Assistant Principal	\$365,984.21			
	School Site Staff	\$335,084.49			
Subtotal		\$13,052,645.11			
Per Student Investments	Gifted	\$172,350.00			Enter optional context for per student investment decisions.
	Professional Development	\$239,375.00			
	Instructional Materials	\$515,135.00			
	Assessments	\$55,535.00			
	Computer & Tech Equipment	\$1,093,465.00			
	Student Activities	\$1,222,847.00			
	Maintenance & Operations	\$2,349,705.00			
	Central Office	\$1,690,945.00			
	Employee Benefits	\$5,694,155.36			
Subtotal*		\$13,132,743.79			
Additional Investments	Low-Income Intervention Teacher	\$616,825.18			Enter optional context for additional investment decisions.
	Low-Income Pupil Support Staff	\$616,825.18			
	Low-Income Extended Day Teacher	\$642,526.22			
	Low-Income Summer School Teacher	\$642,526.22			
	EL Intervention Teacher	\$250,207.27			
	EL Pupil Support Staff	\$250,207.27			
	EL Extended Day Teacher	\$260,790.05			
	EL Summer School Teacher	\$260,790.05			
	EL Core Teacher	\$312,948.06			
	Sp Ed Teacher	\$1,026,530.14			
	Sp Ed Instructional Assistant	\$407,329.75			
	Sp Ed Psychologist	\$159,862.63			
Subtotal		\$5,447,368.02			
Other Investments					
Total**		\$31,632,757.06			Tier Funding Check (Cell G90)

Always
Optional

Tier Funding Investments in Cost Factor Table

- An amount is not expected in each cell or for each cost factor.
- Assists in communicating priorities with new state funding
- Total investments must match the total Tier Funding indicated in Part II, Question 1.

30		FY 2024 Tier Funding	Funding Type (Select)
31	FY 2024 Tier Funding Allocation*: Enter the dollar amount of Tier Funding allocated to the Organizational Unit within the FY 2024 Gross State Contribution. Enter "0" if current-year	\$70,000.00	Estimated
32	1) appropriations did not include Tier Funding. Select whether the amount is estimated or actual funding.		
33			



Scenario – Investing all Tier Funding in One Cost Factor

Cost Factors		Amount in FY 2023 Adjusted Adequacy Target	Budgeted FY 2024 Investments with New Tier Funding [Required]	Budgeted FY 2024 Expenditures (All Resources) [Optional]	Optional District Narratives
Core Investments	Core Teachers	\$497,533.73			Enter optional context for core investment decisions.
	Specialist Teachers	\$99,506.74			
	Instructional Facilitator	\$53,873.07			
	Core Intervention Teacher	\$23,450.63	\$70,000.00		
	Substitute Teachers	\$16,363.96			
	Guidance Counselor	\$33,088.45			
	Nurse	\$12,436.58			
	Supervisory Aide	\$20,058.75			
	Librarian	\$26,893.27			
	Librarian Aide	\$15,044.06			
	Principal	\$40,159.53			
	Assistant Principal	\$34,637.74			
	School Site Staff	\$24,069.23			
	Subtotal	\$897,115.74	\$70,000.00		
Per Student Investments	Gifted	\$15,267.60			Enter optional context for per student investment decisions.
	Professional Development	\$21,611.25			
	Instructional Materials	\$46,507.41			
	Assessments	\$5,013.81			
	Computer & Tech Equipment	\$98,720.19			
	Student Activities	\$26,117.69			
	Maintenance & Operations	\$212,136.03			
	Central Office	\$152,661.87			
	Employee Benefits	\$390,793.65			
	Subtotal*	\$957,941.67			
Additional Investments	Low-Income Intervention Teacher	\$14,633.17			Enter optional context for additional investment decisions.
	Low-Income Pupil Support Staff	\$14,633.17			
	Low-Income Extended Day Teacher	\$15,298.32			
	Low-Income Summer School Teacher	\$15,298.32			
	EL Intervention Teacher	\$0.00			
	EL Pupil Support Staff	\$0.00			
	EL Extended Day Teacher	\$0.00			
	EL Summer School Teacher	\$0.00			
	EL Core Teacher	\$0.00			
	Sp Ed Teacher	\$81,147.62			
	Sp Ed Instructional Assistant	\$32,199.58			
	Sp Ed Psychologist	\$12,520.06			
	Subtotal	\$185,730.24			
	Other Investments				\$70,000.00
	Total**	\$2,040,787.75	\$70,000.00		
					Tier Funding Check (Cell G90)
					Complete, G90=G31



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Total investments = Tier Funding
amount indicated in Question 1.



Additional Tier Funding Scenarios

- A Tier 3 district at 87% of adequacy receives a small amount of Tier Funding.
- It is strategically saving these funds each year until it has sufficient and sustainable resources to hire a technology coordinator.
- The district will enter its total Tier Funding into the row indicated for "Other Investments." It must then provide additional context in the narrative space below the cost factor table.

- A Tier 1 district at 72% of Adequacy has identified, through its needs assessment, that its early literacy curriculum does not align with best practices in reading instruction.
- It is therefore investing its Tier Funding in three cost factors: instructional materials, professional development, and assessments. The total of these investments is equal to the total Tier Funding allotted.
- The district will enter, and community members will see, three values in the table.



Optional – Total Budgeted Expenditures per Cost Factor

Optionally, Organizational Units may also indicate total planned investments for each cost factor—from all revenue sources, not just EBF. As with the column for Tier Funding, this section of the plan is best viewed as a communication tool. When compared to the adjusted amounts embedded in the Adequacy Target (Column F), the values entered by the Organizational Unit can help to frame local context for spending decisions.

Cost Factors		Amount in FY 2023 Adjusted Adequacy Target	Budgeted FY 2024 Investments with New Tier Funding [Required]	Budgeted FY 2024 Expenditures (All Resources) [Optional]	Optional District Narratives
Core Investments	Core Teachers	\$6,945,572.68			Enter optional context for core investment decisions.
	Specialist Teachers	\$2,110,063.39			
	Instructional Facilitator	\$765,894.29			
	Core Intervention Teacher	\$273,234.70			
	Substitute Teacher	\$262,438.93			
	Guidance Counselor	\$652,089.78			
	Nurse	\$163,180.44			
	Supervisory Aide	\$279,251.84			
	Librarian	\$284,155.69			
	Librarian Aide	\$191,366.99			
	Principal	\$424,327.68			
	Assistant Principal	\$365,984.21			
	School Site Staff	\$335,084.49			
	Subtotal	\$13,052,645.11			
Per Student Investments	Gifted	\$172,350.00			Enter optional context for per student investment decisions.
	Professional Development	\$239,375.00			
	Instructional Materials	\$515,135.00			
	Assessments	\$55,535.00			
	Computer & Tech Equipment	\$1,093,465.00			
	Student Activities	\$1,222,847.00			
	Maintenance & Operations	\$2,349,705.00			
	Central Office	\$1,690,945.00			
	Employee Benefits	\$5,694,155.36			
	Subtotal*	\$13,132,743.79			
Additional Investments	Low-Income Intervention Teacher	\$616,825.18			Enter optional context for additional investment decisions.
	Low-Income Pupil Support Staff	\$616,825.18			
	Low-Income Extended Day Teacher	\$642,526.22			
	Low-Income Summer School Teacher	\$642,526.22			
	EL Intervention Teacher	\$250,207.27			
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	EL Extended Day Teacher	\$260,790.05			
	EL Summer School Teacher	\$260,790.05			
	EL Core Teacher	\$312,948.06			
	Sp Ed Teacher	\$1,026,530.14			
	Sp Ed Instructional Assistant	\$407,329.75			
	Sp Ed Psychologist	\$159,862.63			
	Subtotal	\$5,447,368.02			
	Other Investments				
	Total**	\$31,632,757.06			Tier Funding Check (Cell G90)

Always
Optional

Scenarios

- A Tier 2 district at 78% of adequacy does not have sufficient local resources to match the adequacy target for low-income intervention teachers.
- However, it is investing available new resources, including Tier Funding, each year.
- Over time, it will use the table to demonstrate increasing investments for intervention teachers serving low-income students, thereby closing the adequacy gap.

- A Tier 4 district at 175% of adequacy may populate this column to emphasize that investments in certain cost factors have reached or exceeded a measure of adequate spending.
- This may provide useful context in local discussion about how to allocate resources going forward.



Additional Considerations

- The EBF Spending plan is not intended to be an accounting exercise.
- The cost factors are not neatly aligned with accounting requirements or other data sources. Figures in the table are best viewed as approximations of budgeted expenditures rather than amounts that can be tied back to specific financial reports.
- The EBF Spending Plan guidance document contains suggestions and additional information. However, local context will need to inform determinations about investments for each cost factor.

Guidance Document - Appendix Format

- **Specialist Teacher:** *Means a teacher who provides instruction in subject areas not included in core subjects, including, but not limited to, art, music, physical education, health, driver education, career-technical education, and such other subject areas as may be mandated by State law or provided by an Organizational Unit.*
 - **EIS Position Codes:** 208, 312, 601, 608
 - **Expenditure Accounts:** 10-1100-100, 10-1400-100, 10-1700-100, 80-1100-100, 80-1400-100, 80-1700-100
 - **Special Notes:** Salaries for specialist teachers are likely recorded within the expenditure accounts shown here, although other instructional salaries may be included. Reference internal accounting systems or other data to determine budgeted expenditures for specialist teachers.

For each cost factor, the appendix includes the statutory definition as well as broadly aligned position codes and expenditure accounts. This information may be useful to Organizational Units that intend to complete the full cost factor table.



Part III: Support for Special Student Groups, Q1

99			Enter Amounts	Select type	*N
100	1) FY 2024 Student Population Allocations*: Enter the dollar amount of resources attributable to Specific Populations within the FY24 Gross State Contribution. Enter "0" if no funds are allocated for a student group. Select whether amounts are estimated or actual.	Low-Income Students	[Enter \$]		un
101		English Learners	[Enter \$]		ac
102		Special Education	[Enter \$]		

- The purpose of Part III is to indicate planned support for the three student groups for which EBF provides additional funding
- As with Tier Funding, Organizational Units must enter current-year funding for each of the three student groups.
- Select the funding type – Estimated or Actual
- Organizational Units are encouraged to update the spending plan with actual funding amounts prior to transmission to ISBE, if those amounts are known at the time of transmission

EBF student group calculation files are typically released in late August or early September.



Current Year Values

- In total, four current-year values must be entered in the spending plan
- These amounts may be estimated or actual, depending on local timelines for completing the budget or spending plan.
- All organizational units are encouraged to update the plan with actual figures before transmitting to ISBE.
- We will publish a single file with the four required current values for each Organizational Unit.

Part III, Qs 2-4

111	Organizational Unit investment of EBF dollars for English learners: Select the investments that apply. (Optionally, dollar amounts for each investment may be entered.) Response Required	English Learner Intervention Teacher	Yes	English Learner Extended Day Teacher		English Learner Core Teacher	
112		[Optional - Enter \$]		[Optional - Enter \$]		[Optional - Enter \$]	
113		English Learner Pupil Support Staff		English Learner Summer School Teacher		Other Investments	Yes
114		[Optional - Enter \$]		[Optional - Enter \$]		[Optional - Enter \$]	
115	Additional context for the Organizational Unit's planned use of dollars attributable to English learners in FY 2024. (Required if "Other Investments" selected above. No more than 500 characters, including spaces.) Required	We will purchase supplemental materials to support English learners in accessing the core curriculum.					
116							

- The remaining three questions allow Organizational Units to indicate planned investments for each group. The question for English learners is shown here.
- Responses are required if the Organizational Unit receives at least \$5,000 in funding for the specific student group.
- Select "Yes" if investing in the Additional Cost Factor for the indicated student group.
- Select "Yes" for "Other Investments" if planned investments do not match the given options. In this case, some narrative context is required.
- Option to enter dollar amounts for investments.



Spending Requirements for Special Student Groups

EBF statute sets aside specific allocations to be spent for special education, English learners, and low-income students. Per statute these designated funds must be spent on programs and services benefiting these specific student groups. Funds for English learners and low-income students must be spent in addition to, and not in lieu of, funding that supports general programs of instruction for all students. Funds attributable to special education must be used for the provision of special education facilities and services as outlined in ILCS 14-1.08. If the Organizational Unit received at least \$5,000 for any of the student groups, a response to the questions in Part III is required. For amounts less than \$5,000, a response is optional. All other EBF funds may be spent in any manner deemed appropriate by the school district.



Assurances – Article 14C

Plan Assurances

Please complete the assurances below related to Article 14C of the Illinois School Code, which stipulates allowable expenditures for English learners. Organizational Units should maintain supporting documentation (e.g., sign-in sheets, meeting agendas) to affirm the veracity of the below assurances. Note that a separate collection of the Bilingual Service Plan takes place before each school year and must be separately reviewed by the Bilingual Parent Advisory Committee (BPAC). Responses in this plan should be aligned with information contained in the Bilingual Service Plan. Responses in this section are only required if an Organizational Unit receives any amount of EBF dollars attributable to English learners.

Collaboration Opportunity - Organizational Units may find that the plan assurances are most easily and effectively completed if led by program leaders.

1). "I hereby affirm that at least 60% of the school district's state funds attributable to English learners will be used for instructional costs of programs and services for English learners (function 1000), in accordance with Article 14C of the Illinois School Code. The remaining balance of state funds attributable to English learners will also be used to serve English learners."

Required

2). "My school district has at least one attendance center with 20 or more English learners (including parental refusals) who speak the same home language other than English in grades K-12. Alternatively and/or additionally, my school district has at least one attendance center with 20 or more English learners (including parent refusals) who speak the same home language other than English in pre-K."

Required

3). "I hereby affirm that the school district's BPAC will review this EBF Spending Plan by or before October 31, 2023."

4). Enter the anticipated date on which the BPAC review will take place and the name of the BPAC chair for SY 2023-24.

BPAC Meeting (MM/DD/YYYY)	
Name of Chair	

- Required if any amount of funding received for ELs
- Provides assurance of intent to comply with spending requirements
- BPAC review is required if district meets criteria for forming a BPAC
- For FY25, consider moving BPAC consultation earlier in calendar year, to align with other grant consultation requirements and to engage in, rather than inform of, spending decisions.



Completion Tracker

Spending Plan Completion Tracker		
Use the information below to confirm completion of all required questions. Note that the "status" column adjusts to responses, so the tracker is most helpful to consult <u>after</u> you have completed the spending plan.		
Question	Status	Acceptance Criteria
Part 1, Q1	Incomplete	Character length of response must be >10 and <=2000, including spaces.
Part 1, Q2	Incomplete	A <u>different</u> response must be selected in G11, I11, and L11; cells cannot be blank.
Part 1, Q2 (Narrative)	Complete	Response required only if "Other" selected in G11, I11, or L11; character length of response must be >10 and <=1000, including spaces.
Part 2, Q1	Incomplete	A numeric value must be entered in cell G31 (estimated or actual Tier Funding, or 0 if appropriations did not include Tier Funding). A type must be selected in cell H31.
Part 2, Q2	Incomplete	A <u>different</u> response must be selected in G35, I35, and L35; cells cannot be blank.
Part 2, Q3	Incomplete	At least one response must be selected.
Part 2, Q4	Incomplete	Cells G43, I43, and L43 cannot be blank. "Other" may be selected more than once, but other responses may not be repeated.
Part 2, Q4 (Narrative)	Complete	Response required only if "Other" selected in G43, I43, or L43; character length of response must be >10 and <=1000, including spaces.
Part 2, Q5 (Cell G90)	Incomplete	Cell G90 must be equal to the value in cell G31.
Part 2, Q5 (Narrative)	Complete	Response required only if a value was entered in cell G89; character length of response must be >10 and <=1000, including spaces.
Part 3, Q1 Low-Income Funds	Incomplete	A numeric value must be entered, which may be "0" if the organizational unit received no funding for the specified student group. A type must be selected in cell H100.
Part 3, Q1 English Learner Funds	Incomplete	A numeric value must be entered, which may be "0" if the organizational unit received no funding for the specified student group. A type must be selected in cell H101.
Part 3, Q1 Spec. Ed. Funds	Incomplete	A numeric value must be entered, which may be "0" if the organizational unit received no funding for the specified student group. A type must be selected in cell H102.
Part 3, Q2	Incomplete	At least one response must be selected.
Part 3, Q2 (Narrative)	Complete	Response required only if "Other Investments" was selected in the previous question; character length of response must be >10 and <=500, including spaces.
Part 3, Q3	Incomplete	At least one response must be selected.
Part 3, Q3 (Narrative)	Complete	Response required only if "Other Investments" was selected in the previous question; character length of response must be >10 and <=500, including spaces.
Part 3, Q4	Incomplete	At least one response must be selected.
Part 3, Q4 (Narrative)	Complete	Response required only if "Other Investments" was selected in the previous question; character length of response must be >10 and <=500, including spaces.
Assurances 1	Complete	Response required if the value entered in cell G101>0.
Assurances 2	Complete	Response required if the value entered in cell G101>0.
Assurances 3	Complete	Response required if "Yes" selected in cell E133.
Assurances 4 (Meeting Date)	Complete	Response required if "Yes" selected in cell E133; enter date in MM/DD/YYYY format.
Assurances 4 (Name of Chair)	Complete	Response required if "Yes" selected in cell E133.

Review after you believe you have completed all required questions.



Illinois
State Board of
Education

Budget Amendments

- School districts periodically submit amended budgets for a variety of reasons.
- It is not necessary to amend the spending plan if you are amending the budget. However, if for any reason you would like to amend the spending plan that is published by ISBE, please email ebfspendingplan@isbe.net



Next Steps

- The budget form will be available in June. School districts will complete the spending plan within the budget form. Simply follow the normal local procedures for transmitting the budget to ISBE.
- Other OUs: a final template will be published at the same time the budget is released. Transmit the spending plan to ebfspendingplan@isbe.net by or before October 31.
- When current year tier funding and the amounts for each student group are known, I will publish a single file with the four values that are required in the spending plan.
- Notice of availability will be provided in the ISBE Weekly Message.



Resources posted at www.isbe.net/ebfspendingplan

- Webinar recording
- Guidance document
- Blank template in English and Spanish (coming soon) – *particularly helpful for collaboration or BPAC*
- Research on effective educational investments



Questions

- Please enter questions in the chat.
- If we don't get to your question, I'll review and respond at a later time.



FY 24 EBF Spending Plan Webinar

Thank you for watching!

This webinar's slides and recordings are posted to
www.isbe.net/ebfspendingplan
where other EBF resources are also available

Further questions can be sent to
ebfspendingplan@isbe.net