

EBF Spending Plan

Reporting Updates and Instructions for FY 2025

June 3, 2024

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

Agenda

- Context for the EBF Spending Plan
- FY25 Guidance Highlights
- Navigating and Completing the Spending Plan
- 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 is 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.

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

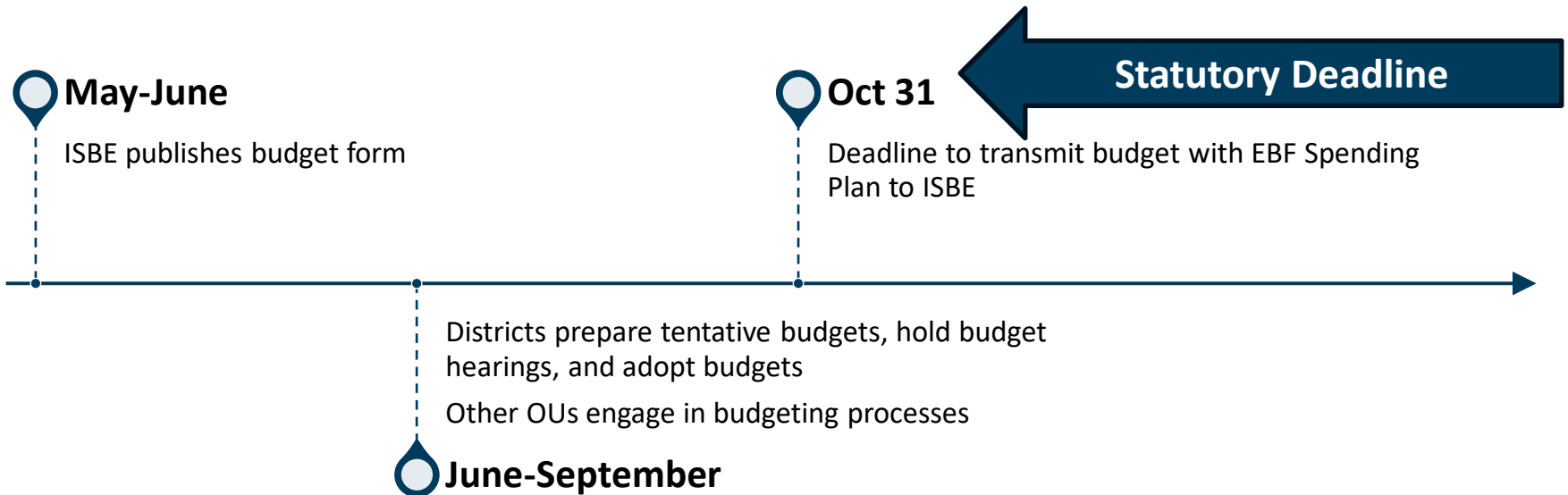
Consistent with statute

**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

Annual Timeline



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

Agenda

- Context for the EBF Spending Plan
- FY25 Guidance Highlights
- Navigating and Completing the Spending Plan
- Additional Resources

FY 25 Guidance Highlights

There are no substantive changes to the guidance or instructions for completing the FY 2025 EBF Spending Plan.

Additions to the guidance are meant to inform districts of additional data validation formulas within the spending plan. We also provide an update on actions of the General Assembly that relate to the spending plan.

While the guidance document provides step-by-step instructions and detailed information, the spending plan is intuitive and most districts will be able to complete it without referencing the guidance.

Data Validation – Four Current-Year Funding Amounts

- The EBF Spending Plan requires users to enter **four current-year funding amounts**. ISBE has added new data validation formulas to ensure **estimated** figures entered are reasonable.
- Districts that submit budgets to ISBE before current-year EBF amounts are published may provide estimates for Tier Funding and the amounts provided for low-income students, ELs, and special education.
- Districts that submit budgets to ISBE after current-year EBF amounts are published **must use published current-year amounts**. The EBF Spending Plan team will publish a file with these amounts on its [website](#). It will also email this file to all users in each district that have access to the IWAS School District Financial Reports application. This typically includes superintendents and staff who work on financial reports.

Data Validation – Four Current-Year Funding Amounts

- Estimated amounts should be based on a reasonable percent change from prior-year funding.
- The EBF Spending Plan provides prior year amounts for ease of reference.

18			Average Student Enrollment	220.31	Adequacy Target	\$3,433,412
19						
20		<i>Final Resources / Adequacy Target =</i>	Final Resources	\$4,645,378	Percent of Adequacy	135%
21		<i>Percent of Adequacy</i>				
22		<i>Base Funding Minimum</i>	Tier Assignment	4	Gross State Contribution	\$4,302,255
23		<i>+</i>				
24		<i>Tier Funding =</i>	FY24 Base Funding Minimum	\$4,302,036	FY 2024 Tier Funding	\$219
25		<i>Gross State Contribution</i>				
26		<i>Within FY 2024 Gross State Contribution,</i>	Low-Income Students	\$126,208		
27		<i>Resources Attributable to</i>	English Learners (Els)	\$10,567		
28		<i>Specific Populations</i>	Special Education	\$85,518		
29						

HB 3446

HB 3446 makes several changes to section (h) of ILCS 18-8.15. Specifically, it:

- Codifies that the spending plan must include reference to stakeholders that are consulted.
- Mandates that ISBE produce a tool to make spending plan content more accessible on ISBE's webpage. ISBE intends to produce a public dashboard.

Agenda

- Context for the EBF Spending Plan
- FY25 Guidance Highlights
- Navigating and Completing the Spending Plan
- Additional Resources

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:

Please select from drop down list in row 18.

RCDT:

>

≡

Cover Page (Start Here)

FY25 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 an 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

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 different 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 G32.
Part 2, Q2	Incomplete	A different 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. 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. A type must be selected in cell H102.
Part 3, Q2	Complete	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	Complete	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	Complete	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. ISBE will reject budgets with incomplete spending plans.

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 2024-25 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

Improve programs, curriculum, and/or learning tools

Top Strategy 2

Increase number and/or quality of professional development opportunities

Top Strategy 3

Other

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

Required

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 2025 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.					
<i>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.</i>					
Evidence-Based Funding Organizational Unit Results (FY 2024)	Final Resources / Adequacy Target = Percent of Adequacy	Average Student Enrollment	6,582.75	Adequacy Target	\$107,517,831
		Final Resources	\$88,106,166	Percent of Adequacy	82%
	Base Funding Minimum + Tier Funding = Gross State Contribution	Tier Assignment	2	Gross State Contribution	\$51,161,359
		FY24 Base Funding Minimum	\$50,582,556	FY 2024 Tier Funding	\$578,803
	Within FY 2024 Gross State Contribution, Resources Attributable to Specific Populations	Low-Income Students	\$5,745,335		
		English Learners (ELs)	\$754,479		
		Special Education	\$3,338,432		

- 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 FY25.

Part II – Current-Year Tier Funding

	FY 2025 Tier Funding	Funding Type (Select)
1) FY 2025 Tier Funding Allocation*: Enter the dollar amount of Tier Funding (e.g., NEW MONEY only) allocated to the Organizational Unit for FY 2025. Select whether the amount is estimated or actual funding.	\$75,000	Estimated

- Enter the amount of **FY 2025 Tier Funding** for the current year (NEW MONEY only)
- Select the funding type – Estimated or Actual
- Organizational Units must use actual funding amounts if those amounts have been published before submitting the budget to ISBE.
- 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

	Data Source 1	Data Source 2	Data Source 3
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.)			
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) Special Ed. Program Director(s) Other Program Leaders School Board Members	Principals School Improvement Teams Teacher or Support Staff Unions Other School Staff	Bilingual Parent Advisory Committee Other Parent Group(s) Community Focus Group(s) Other
[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

	Priority Investment 1	Priority Investment 2	Priority Investment 3
4) Given the data analyzed, the stakeholders consulted, and the priorities identified in Part I, indicate the top three priority investments the Organizational Unit will make with its FY 2025 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	Professional Development
If "Other" was selected in question 4, please describe. (No more than 1000 characters, including spaces.)			

- 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 **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 (cell G90) **must be equal to** the Tier Funding amount you entered in Question 1 (cell G31).
- 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 \geq \$5,000

Cost Factors		Amount in FY 2024 Adjusted Adequacy Target	Budgeted FY 2025 Investments with New Tier Funding [Required]	Budgeted FY 2025 Expenditures (All Resources) [Optional]	Optional District Narratives
Core Investments	Core Teachers	\$8,631,274			Enter optional context for core investment decisions.
	Specialist Teachers	\$2,119,024			
	Instructional Facilitator	\$900,697			
	Core Intervention Teacher	\$362,348			
	Substitute Teachers	\$323,441			
	Guidance Counselor	\$629,022			
	Nurse	\$199,859			
	Supervisory Aide	\$338,281			
	Librarian	\$401,884			
	Librarian Aide	\$243,424			
	Principal	\$596,207			
	Assistant Principal	\$513,336			
	School Site Staff	\$405,921			
Subtotal		\$15,664,718			
Per Student Investments	Gifted	\$208,170			Enter optional context for per student investment decisions.
	Professional Development	\$291,219			
	Instructional Materials	\$757,169			
	Assessments	\$79,212			
	Computer & Tech Equipment	\$1,330,287			
	Student Activities	\$926,011			
	Maintenance & Operations	\$3,170,790			
	Central Office	\$2,182,976			
	Employee Benefits	\$6,804,767			
Subtotal*		\$15,878,092			
Additional Investments	Low-Income Intervention Teacher	\$659,869			Enter optional context for additional investment decisions.
	Low-Income Pupil Support Staff	\$659,869			
	Low-Income Extended Day Teacher	\$687,008			
	Low-Income Summer School Teacher	\$687,008			
	EL Intervention Teacher	\$301,632			
	EL Pupil Support Staff	\$301,632			
	EL Extended Day Teacher	\$314,039			
	EL Summer School Teacher	\$314,039			
	EL Core Teacher	\$376,847			
	Sp Ed Teacher	\$1,280,968			
	Sp Ed Instructional Assistant	\$518,886			
	Sp Ed Psychologist	\$198,368			
Subtotal		\$6,300,166			
Other Investments					\$0.00
Total**		\$37,842,977			Tier Funding Check (Cell G90)

Always
Optional

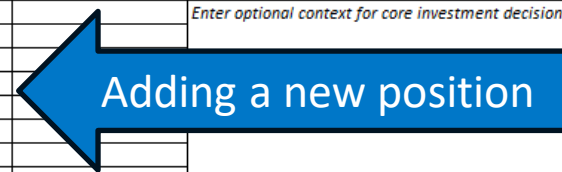
Tier Funding Investments in Cost Factor Table

- 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 (cell G31).

		FY 2025 Tier Funding	Funding Type (Select)
1)	FY 2025 Tier Funding Allocation*: Enter the dollar amount of Tier Funding (e.g., NEW MONEY only) allocated to the Organizational Unit for FY 2025. Select whether the amount is estimated or actual funding.	\$75,000	Estimated

Scenario – Investing all Tier Funding in One Cost Factor

Cost Factors		Amount in FY 2024 Adjusted Adequacy Target	Budgeted FY 2025 Investments with New Tier Funding [Required]	Budgeted FY 2025 Expenditures (All Resources) [Optional]	Optional District Narratives
Core Investments	Core Teachers	\$8,631,274			Enter optional context for core investment decisions.
	Specialist Teachers	\$2,119,024			
	Instructional Facilitator	\$900,697			
	Core Intervention Teacher	\$362,348	\$75,000		
	Substitute Teachers	\$323,441			
	Guidance Counselor	\$629,022			
	Nurse	\$199,859			
	Supervisory Aide	\$338,281			
	Librarian	\$401,884			
	Librarian Aide	\$243,424			
	Principal	\$596,207			
	Assistant Principal	\$513,336			
	School Site Staff	\$405,921			
Subtotal		\$15,664,718	\$75,000		
Per Student Investments	Gifted	\$208,170			Enter optional context for per student investment decisions.
	Professional Development	\$291,219			
	Instructional Materials	\$757,169			
	Assessments	\$79,212			
	Computer & Tech Equipment	\$1,330,287			
	Student Activities	\$926,011			
	Maintenance & Operations	\$3,170,790			
	Central Office	\$2,182,976			
	Employee Benefits	\$6,804,767			
Subtotal*		\$15,878,092			
Additional Investments	Low-Income Intervention Teacher	\$659,869			Enter optional context for additional investment decisions.
	Low-Income Pupil Support Staff	\$659,869			
	Low-Income Extended Day Teacher	\$687,008			
	Low-Income Summer School Teacher	\$687,008			
	EL Intervention Teacher	\$301,632			
	EL Pupil Support Staff	\$301,632			
	EL Extended Day Teacher	\$314,039			
	EL Summer School Teacher	\$314,039			
	EL Core Teacher	\$376,847			
	Sp Ed Teacher	\$1,280,968			
	Sp Ed Instructional Assistant	\$518,886			
	Sp Ed Psychologist	\$198,368			
Subtotal		\$6,300,166			
Other Investments					\$75,000
Total**		\$37,842,977	\$75,000		Tier Funding Check (Cell G90) Complete, G90=G31



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 2024 Adjusted Adequacy Target	Budgeted FY 2025 Investments with New Tier Funding [Required]	Budgeted FY 2025 Expenditures (All Resources) [Optional]	Optional District Narratives
Core Investments	Core Teachers	\$8,631,274			Enter optional context for core investment decisions.
	Specialist Teachers	\$2,119,024			
	Instructional Facilitator	\$900,697			
	Core Intervention Teacher	\$362,348			
	Substitute Teachers	\$323,441			
	Guidance Counselor	\$629,022			
	Nurse	\$199,859			
	Supervisory Aide	\$338,281			
	Librarian	\$401,884			
	Librarian Aide	\$243,424			
	Principal	\$596,207			
	Assistant Principal	\$513,336			
	School Site Staff	\$405,921			
Subtotal		\$15,664,718			
Per Student Investments	Gifted	\$208,170			Enter optional context for per student investment decisions.
	Professional Development	\$291,219			
	Instructional Materials	\$757,169			
	Assessments	\$79,212			
	Computer & Tech Equipment	\$1,330,287			
	Student Activities	\$926,011			
	Maintenance & Operations	\$3,170,790			
	Central Office	\$2,182,976			
	Employee Benefits	\$6,804,767			
Subtotal*		\$15,878,092			
Additional Investments	Low-Income Intervention Teacher	\$659,869			Enter optional context for additional investment decisions.
	Low-Income Pupil Support Staff	\$659,869			
	Low-Income Extended Day Teacher	\$687,008			
	Low-Income Summer School Teacher	\$687,008			
	EL Intervention Teacher	\$301,632			
	EL Pupil Support Staff	\$301,632			
	EL Extended Day Teacher	\$314,039			
	EL Summer School Teacher	\$314,039			
	EL Core Teacher	\$376,847			
	Sp Ed Teacher	\$1,280,968			
	Sp Ed Instructional Assistant	\$518,886			
	Sp Ed Psychologist	\$198,368			
Subtotal		\$6,300,166			
Other Investments					\$0.00
Total**		\$37,842,977			Tier Funding Check (Cell G90)



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

		Enter Amounts	Select type
1)	FY 2025 Student Population Allocations*: Enter the dollar amount of resources attributable to Specific Populations within the FY25 Gross State Contribution. Enter "0" if no funds are allocated for a student group. Select whether amounts are estimated or actual.	Low-Income Students	
		English Learners	
		Special Education	

- 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 must use actual funding amounts if those amounts are published before submitting to ISBE.

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

Part III, Qs 2-4

3)	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	
		[Optional - Enter \$]		[Optional - Enter \$]		[Optional - Enter \$]	
	English Learner Pupil Support Staff		English Learner Summer School		Other Investments	Yes	
	[Optional - Enter \$]		[Optional - Enter \$]		[Optional - Enter \$]		
	Additional context for the Organizational Unit's planned use of dollars attributable to English learners in FY 2025. (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.					

- 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, 2024."

4). Enter the anticipated date on which the BPAC review will take place and the name of the BPAC chair for SY 2024-25.

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
- In cases where funding for, and service to, ELs is shared (such as for certain ROEs/ISCs and districts), it is the joint responsibility of home and serving entities to ensure that the requirements of 14C are met.
- BPAC review is required if district meets criteria for forming a BPAC

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 G32.
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. 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. A type must be selected in cell H102.
Part 3, Q2	Complete	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	Complete	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	Complete	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	Incomplete	Response required if the value entered in cell G101>0.
Assurances 2	Incomplete	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. ISBE will reject budgets with incomplete spending plans.

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.**
- ISBE will not collect spending plan data from amended budgets.
- 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 is available on ISBE's [website](#) now. School districts will complete the spending plan within the budget form. Simply follow the normal local procedures for transmitting the budget to ISBE. The IWAS application for submission will open in mid-June.
- Other OUs: a final template will be sent to you. Submit 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, we 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.

Agenda

- Context for the EBF Spending Plan
- FY25 Guidance Highlights
- Navigating and Completing the Spending Plan
- Additional Resources

Accessing Prior-Year Spending Plan Responses for School Districts

Prior-Year Spending Plans can be accessed on ISBE's website by following the instructions below:

1. Navigate to <https://cerberus.isbe.net/login>
2. Enter **finread** for the username (there is no password)
3. Select: Budgets > 2024 > School Districts
4. Search for a district and download the budget excel
5. The EBF Spending Plan is a tab within the budget file

Accessing Prior-Year Spending Plan Responses for ROEs, ISCs & Laboratory Schools

FY 2024 EBF Spending Plan submissions for Organizational Units that **do not** submit a budget can be found on the [EBF Spending Plan webpage](#), under the tab “Instructions for Accessing EBF Spending Plans for ROEs, ISCs, and Laboratory Schools.”

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, we'll review and respond at a later time.



FY 25 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