

Achievement and Integration Revenue FY 2017 Budget Workbook

This workbook includes new features to help districts with their annual AI budget. Some basic budget information is now listed below. Please continue to refer to the *Achievement Integration Budget Requirements* on MDE's AI webpage for additional, detailed budget requirements.

Another new feature is the *Expenditure Summary* page. Many districts create such a page to track the required budget ratios and total expenditures. Having this as a common feature will create efficiencies for developing and reviewing all budgets.

- Remember, one of the most important steps is having a district's program and fiscal staff collaborate on this budget.
- As always, proposed expenditures that align with budget requirements will be approved only for programs and activities included in a district's MDE-approved AI plan.
- These budget worksheets are organized around the 80/20/10% budget ratios explained in the *AI Budget Requirements*. These ratios are included in AI legislation.
- It is important to include a budget narrative for each line item in the space provided. This information enables you to document the connection between activities in your district's MDE-approved AI plan and proposed expenditures. Budget narratives should provide expenditure detail that is *not* included in your district's AI plan.
- Please *do not* delete pages from this workbook. Doing so will disable the formulas on the new Expenditure Summary page.
- Add lines to a worksheet by inserting rows *before* the row preceding a revenue total line. This last row is part of a formula for your Expenditure Summary page. If you insert rows after this one, your Expenditure Summary detail will not be accurate.
- Find your district's aid entitlement estimate for AI revenue in the Minnesota Funding Reports (MFR) section of the MDE website. Steps for viewing that report are listed on the MDE AI webpage.

- In order to save time during your budget review, please list FIN 313 (initial revenue) and FIN 318 (incentive revenue) expenditures on separate tabs. FIN 318 expenditures should be included on the tabs marked FIN 318.
- Because AI revenue is a 70/30 percent levy/aid appropriation, superintendent and board chair signatures are required on the budget coversheet.
- Payments to integration collaboratives should be listed as line items in the corresponding Direct Student Services, PD, or Admin tabs.
- The budget narratives for proposed salary expenditures should include the following: percentage FTE, name of position, and the name of the program included in the district's AI plan that the position is part of.
- Only fringe benefits for positions that are part of the same program may be bundled by OBJ code.

- Resubmit this workbook listing proposed and actual FY 2017 expenditures by December 1, 2017. Remember, expenditure changes over \$3,000 per line item or 10% of total expenditures must be approved by MDE prior to April 1, 2017.
- Address general questions on budget submission to the Office of Equity and Innovation at mde.integration@state.mn.us or by calling 651-582-8462.

FINAL STEPS

- 1) Return proposed budget by March 15, 2016 to mde.integration@state.mn.us.
- 2) Electronic submission is required.
- 3) Submit your district's budget as an excel file. No PDF's please.
- 4) Please submit your budget using the file name *FY17 [District Name] AI budget*.

Thank you for your work on this budget!

Use the worksheets provided here to list your district's proposed expenditures of FY 2017 Achievement Integration (AI) revenue.

District Name: Rochester
District ISD Number: 535
Superintendent: Michael Muñoz
Collaborative:
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If you have been notified by MDE that your district has one or more *Racially Identifiable Schools*, please list those schools here: **Gage Elementary**

Total Initial Revenue expenditures (FIN 313 expenditures)	\$2,445,931.18
Total Incentive Revenue expenditures (FIN 318 expenditures)	\$181,933.00
TOTAL AI REVENUE	\$ 2,627,864.18

CERTIFICATION STATEMENT

We certify that the budget information submitted for our school district to the Minnesota Department of Education (MDE) is an accurate and complete representation of the fiscal year 2017 Achievement & Integration budget as approved by the school board.

Board Approval Date 3/8/2016

School Board Chair _____ **Date** _____

Superintendent _____ **Date** _____

Approved Initial Revenue: _____ **Approved Incentive Revenue:** _____

MDE Approval: _____ **Date:** _____

This Expenditure Summary worksheet will autofill as expenditure detail is added on the following pages. Because it is protected you will not be able to enter data into this worksheet.

District Number:

535

District Name:

Rochester

Proposed Budget			Actual Expenditures		
		Proposed Budget Ratios			Actual Budget Ratios
Direct Services to Students must equal at least 80% of total revenue	\$2,310,857.00	87.94%	DSS At least 80% of total expenditures	\$0.00	#DIV/0!
Professional Development may equal no more than 20% of total revenue	\$239,007.18	9.10%	Professional Development No more than 20% of total expenditures	\$0.00	#DIV/0!
Administrative/Indirect may equal no more than 10% of total revenue	\$78,000.00	2.97%	Admin/Indirect No more than 10% of total expenditures	\$0.00	#DIV/0!
Total Proposed Revenue:	\$2,627,864.18		Total Revenue Expended	\$0.00	

Total Amount Proposed FIN 313	\$2,445,931.18
Total Amount Proposed FIN 318	\$181,933.00

Notes or Comments :



FY 2017 Achievement and Integration Budget

District Number: 535 District Name: Rochester

80% Direct Services to Students
 On this worksheet please list all proposed FIN 313 expenditures for Direct Student Services. At least 80% of a district's proposed expenditures must be used for programs included in the district's MDE-approved AI plan which provide direct services to students. See the current AI Budget Requirements for details.

Line Item Description	UFARS Code Required				Budgeted Amt	Actual Amt	Budget Narrative: a crosswalk between your AI budget and your AI plan
Provide a short description of the expenditure.	ORG	PROG	FIN	OBJ	List the total amount budgeted for this line item.	Resubmit form with actual FY17 expenditures by 12/1/17.	By name or number, identify the activity in your plan that each expenditure supports. Provide a brief description of how these funds will be used to support that activity. This narrative should be different from the program description in your plan.
Equity Specialist (1.0 FTE)	005	790	313	143	\$50,000.00		Facilitate communication between students, parents, and school staff to ensure student achievement. Act as a consultant to teachers, administrators and other staff regarding culture, heritage and background for students and families. Serve as a bridge between the schools and families and advocate of educational equity for all students and families. Work with principals to develop a positive building climate that leads to educational equity and student achievement for all students. Work with the building head principal to create equity presentations for staff. Work with building teams designated to analyze school data (Equity team, Professional Learning Committee, Positive Behavior Intervention Systems, and Data Teams) to develop action plans to ensure educational equity for all students. Establish and develop strong community relationships (colleges and universities, religious, social services) to cultivate the possibilities of college from elementary to high school, engage in service learning, and to provide our students and families with community resources. Facilitate student's empowerment, social, racial, academic, and identity development groups. Monitor students' academic progress and work with other building staff to develop academic success plans for students.
Benefits	005	790	313	2xx	\$22,466.00		Benefits
Materials to support Spanish Immersion Program	005	790	313	433	\$200.00		At home reading materials will be purchased to support learning at home for students from families of poverty in our SAFE and Spanish Immersion Programs.
Academic Support in reading and math (8.0 FTE)	005	790	313	143	\$530,000.00		Each site in Rochester Public Schools will have additional staff to support student achievement in the areas of reading and math. Students are identified using Tiered Instruction Indicators. Tier II and some Tier III learners are serviced by these staff members. Allocation per site is based student need.
Benefits	005	790	313	2xx	\$205,000.00		Benefits
Bilingual Paraprofessionals (11.125 FTE)	005	790	313	175	\$325,000.00		These staff members work directly with students, families and staff to provide tutoring support, career and college readiness counseling, academic support and more. Many of our bilinguals are fluent in more than two languages. They are also familiar with culture and customs of the areas in which some of our families come from. This helps ensure a better understanding of and connection to the student and family.
Benefits	005	790	313	2xx	\$207,000.00		Benefits
Minority Liaison (0.9375 FTE)	305	790	313	175	\$25,500.00		These staff members work directly with students, families and staff to provide tutoring support, career and college readiness counseling, academic support and more. They are located in our three comprehensive high schools. As part of the staff, they connect with kids daily, mentor learners, and provide professional development and support to staff members to ensure connections with kids.
Benefits	305	790	313	2xx	\$21,500.00		Benefits
Minority Liaison (0.9375 FTE)	315	790	313	175	\$25,500.00		These staff members work directly with students, families and staff to provide tutoring support, career and college readiness counseling, academic support and more. They are located in our three comprehensive high schools. As part of the staff, they connect with kids daily, mentor learners, and provide professional development and support to staff members to ensure connections with kids.
Benefits	315	790	313	2xx	\$13,000.00		Benefits
Minority Liaison (0.9375 FTE)	325	790	313	175	\$24,000.00		These staff members work directly with students, families and staff to provide tutoring support, career and college readiness counseling, academic support and more. They are located in our three comprehensive high schools. As part of the staff, they connect with kids daily, mentor learners, and provide professional development and support to staff members to ensure connections with kids.
Benefits	325	790	313	2xx	\$12,500.00		Benefits
Minority Liaison (0.9375 FTE)	335	790	313	175	\$26,500.00		These staff members work directly with students, families and staff to provide tutoring support, career and college readiness counseling, academic support and more. They are located in our three comprehensive high schools. As part of the staff, they connect with kids daily, mentor learners, and provide professional development and support to staff members to ensure connections with kids.
Benefits	335	790	313	2xx	\$13,000.00		Benefits
Minority Liaison (0.5 FTE)	340	790	313	175	\$12,500.00		These staff members work directly with students, families and staff to provide tutoring support, career and college readiness counseling, academic support and more. They are located in our three comprehensive high schools. As part of the staff, they connect with kids daily, mentor learners, and provide professional development and support to staff members to ensure connections with kids.
Benefits for Minority Liaisons	340	790	313	2xx	\$2,000.00		Benefits
Secondary Transition Specialist (0.8385 FTE)	310	790	313	175	\$37,500.00		These staff members work directly with students, families and staff to provide tutoring support, career and college readiness counseling, academic support and more. These faculty work directly with underrepresented groups including free and reduced, as well first generation college bound learners. They focus specifically on the transition from elementary to middle, and middle to high school in addition to the transition from high school to post secondary world. As part of the staff, they connect with kids daily, mentor learners, and provide professional development and support to staff members to ensure connections with kids.
Benefits	310	790	313	2xx	\$15,500.00		Benefits
Secondary Transition Specialist (1.0 FTE)	330	790	313	175	\$45,000.00		These staff members work directly with students, families and staff to provide tutoring support, career and college readiness counseling, academic support and more. These faculty work directly with underrepresented groups including free and reduced, as well first generation college bound learners. They focus specifically on the transition from elementary to middle, and middle to high school in addition to the transition from high school to post secondary world. As part of the staff, they connect with kids daily, mentor learners, and provide professional development and support to staff members to ensure connections with kids.
Benefits	330	790	313	2xx	\$17,000.00		Benefits
FIN 313 TOTAL					\$1,630,666.00	\$0.00	

Notes or Comments:

FY 2017 Achievement and Integration Budget

District Number: 535

District Name: Rochester

80% Direct Services

On this worksheet please list proposed **FIN 318** expenditures for Direct Student Services. At least 80% of a district's proposed expenditures must be used for programs included in

Line Item Description	UFARS Code Required				Budgeted Amt	Actual Amt	Budget Narrative: a crosswalk between your AI budget and your AI plan
Provide a short description of the expenditure.	ORG	PROG	FIN	OBJ	List the total amount budgeted for this line item.	Resubmit form with actual FY17 expenditures by 12/1/17.	By name or number, identify the activity in your plan that each expenditure supports. Provide a brief description of how these funds will be used to support that activity. This narrative should be different from the program description in your plan.
Equity Specialist (2.0 FTE)	005	790	318	143	\$137,000.00		Facilitate communication between students, parents, and school staff to ensure student achievement. Act as a consultant to teachers, administrators and other staff regarding culture, heritage and background for students and families. Serve as a bridge between the schools and families and advocate of educational equity for all students and families. Work with principals to develop a positive building climate that leads to educational equity and student achievement for all students. Work with the building head principal to create equity presentations for staff. Work with building teams designated to analyze school data (Equity team, Professional Learning Committee, Positive Behavior Intervention Systems, and Data Teams) to develop action plans to ensure educational equity for all students. Establish and develop strong community relationships (colleges and universities, religious, social services) to cultivate the possibilities of college from elementary to high school, engage in service learning, and to provide our students and families with community resources. Facilitate student's empowerment, social, racial, academic, and identity development groups. Monitor students' academic progress and work with other building staff to develop academic success plans for students.
Benefits	005	790	318	2xx	\$44,933.00		Benefits
FIN 318 TOTAL					\$181,933.00	\$0.00	

Notes or Comments:

FY 2017 Achievement and Integration Budget

District Number: 535

District Name: Rochester

20% Professional Development

On this worksheet please list proposed **FIN 313** expenditures for professional development. No more than 20% of a district's proposed expenditures may be used for PD costs that are part of a district's MDE-approved plan. See the current AI Budget Requirements for details.

Line Item Description	UFARS Code Required				Budgeted Amt	Actual Amt	Budget Narrative
	ORG	PROG	FIN	OBJ			
Provide a short description of the expenditure.					List the total amount budgeted for this line item.	Resubmit form with actual FY17 expenditures by 12/1/17.	By name or number, identify the activity in your plan that each expenditure supports. Provide a brief description of how these funds will be used to support that activity. This narrative should be different from the program description in your plan.
Professional Development for Staff Equity Training	005	640	313	305	\$20,000.00		Work to continue to develop staff in the areas of cultural competency, working with diverse populations, and student engagement for all. Planning on using training from Institute for Engaged Principals or similar vendor.
Professional Development for Staff Equity Training	005	640	313	366	\$28,007.18		Work to continue to develop staff in the areas of cultural competency, working with diverse populations, and student engagement for all. Planning on using training from Institute for Engaged Principals or similar vendor.
Instructional Coaches (2.0 FTE)	005	640	313	143	\$140,000.00		Instructional coaches will be provided to provide job embedded professional growth for staff members using Jim McKnight's collaborative coaching model.
Benefits for Instructional Coaches	005	640	313	2xx	\$51,000.00		Instructional coaches will be provided to provide job embedded professional growth for staff members using Jim McKnight's collaborative coaching model.
TOTAL					\$239,007.18	\$0.00	

Notes or Comments :

District Number: 535

District Name: Rochester

10% Admin/Indirect Costs

On this worksheet please list proposed Administrative/Indirect **FIN 313** expenditures. No more than 10% of total revenue may be spent on PD costs that are part of a district's MDE-approved plan. See the current AI Budget Requirements for details.

Line Item Description	UFARS Code Required				Budgeted Amount	Actual Expenditures	Budget Narrative
	ORG	PROG	FIN	OBJ			
Provide a short description of the expenditure.					List the total amount budgeted for this line item.	Resubmit form with actual FY17 expenditures by 12/1/17.	By name or number, identify the activity in your plan that each expenditure supports. Provide a brief description of how these funds will be used to support that activity. This narrative should be different from the program description in your AI plan.
Coordinator of SAFE & Community Partners (0.5 FTE)	005	790	313	143	\$60,000.00		This position will work directly with families and community partners to enhance and secure opportunities for students. Through partnerships, enriched learning and growing opportunities will be created for the
Benefits for Coordinator of SAFE & Community Partners	005	790	313	2xx	\$18,000.00		This position will work directly with families and community partners to enhance and secure opportunities for students. Through partnerships, enriched learning and growing opportunities will be created for the
Total					\$78,000.00	\$0.00	

Notes or Comments :

FY 2017 Achievement and Integration Budget

District Number: 535

District Name: Rochester

80% Direct Services to

On this worksheet please list proposed **FIN 313** expenditures for Direct Student Services for your district's Racially Identifiable School(s). At least 80% of a district's proposed expenditures must be used for programs included in the district's MDE-approved AI plan which provide direct services to students. See the current AI Budget Requirements for details.

Line Item Description	UFARS Code Required				Budgeted Amt	Actual Amt	Budget Narrative: a crosswalk between your AI budget and your AI plan
	ORG	PROG	FIN	OBJ			
Provide a short description of the expenditure.					List the total amount budgeted for this line item.	Resubmit form with actual FY17 expenditures by 12/1/17.	By name or number, identify the activity in your plan that each expenditure supports. Provide a brief description of how these funds will be used to support that activity. This narrative should be different from the program description in your plan.
Additional reading resources for learners	126	203	313	430	\$5,258.00		Materials will be purchased to support the at home reading component of the Spanish immersion first grade program. These materials are an essential tool to continue the learning and growth of our Spanish language speakers.
Spanish Immersion Program--Kindergarten Teachers (2.0 FTE)	126	201	313	140	\$100,000.00		These staff members will provide unique learning opportunities through the Spanish immersion program at Gage Elementary School. Enrollment in the Immersion program is open to all kindergarten students in Rochester Public Schools. At this time, we have been able to accommodate all families that have signed up for participation in the immersion program for their kindergartener. All of the Immersion K learners will be moving into immersion grade 1; as well as a few new first graders from around the district that have demonstrated basic Spanish language skills.
Benefits for Spanish Immersion Program K teachers	126	201	313	2xx	\$26,000.00		Benefits
Spanish Immersion Program--1st/2nd Grade Teachers (4.0 FTE)	126	203	313	140	\$215,000.00		These staff members will provide unique learning opportunities through the Spanish immersion program at Gage Elementary School. Enrollment in the Immersion program is open to all kindergarten students in Rochester Public Schools. At this time, we have been able to accommodate all families that have signed up for participation in the immersion program for their kindergartener. All of the Immersion K learners will be moving into immersion grade 1; as well as a few new first graders from around the district that have demonstrated basic Spanish language skills.
Benefits for Spanish Immersion 1st/2nd Teachers	126	203	313	2xx	\$80,000.00		Benefits
Spanish Immersion Program--Paraprofessionals (2.875 FTE)	126	203	313	141	\$62,000.00		These staff members will provide unique learning opportunities through the Spanish immersion program at Gage Elementary School. Enrollment in the Immersion program is open to all kindergarten students in Rochester Public Schools. At this time, we have been able to accommodate all families that have signed up for participation in the immersion program for their kindergartener. All of the Immersion K learners will be moving into immersion grade 1; as well as a few new first graders from around the district that have demonstrated basic Spanish language skills.
Benefits for Spanish Immersion Paraprofessionals	126	203	313	2xx	\$10,000.00		Benefits
			313			\$0.00	
FIN 313 TOTAL					\$498,258.00	\$0.00	

Notes or Comments :