

Brown, Samuel

From: Taylor, Martha
Sent: Wednesday, March 25, 2015 6:07 PM
To: Anurima Bhargava; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Willis D. Hawley; Zoe Savitsky
Cc: Desegregation; Tolleson, Julie; Soto, Karla; Weatherless, Renee; RLL
Subject: FW: Supplemental Memo Information
Attachments: 20150325 Draft 2 USP Budget Supplemental Information.pdf

Dr. Hawley and counsel: Attached please find our revised memo that provides a more detailed explanation of year-to-year changes for each activity. We look forward to discussing with you tomorrow.

Thank you.

From: Taylor, Martha
Sent: Tuesday, March 24, 2015 10:17 AM
To: amarks@markslawoffices.com; Anurima Bhargava; James Eichner; Juan Rodriguez; Lois Thompson; Rubin Salter; Willis D. Hawley; Zoe Savitsky
Cc: Desegregation; Tolleson, Julie; Soto, Karla; Weatherless, Renee; RLL
Subject: Supplemental Memo Information

Dr. Hawley and counsel: Yesterday we provided the Draft 2 budget per the agreed-upon timeline. In addition, we provided a cover memo to facilitate your review of the budget. By tomorrow, we will provide a revised/supplemental memo explaining in greater detail some of the year-to-year changes for each activity.

Thank you.

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TUCSON UNIFIED SCHOOL DISTRICT
Desegregation Department

To: Willis Hawley, Special Master
Cc: All Parties
Re: Draft 2 USP Budget 2015-16 – Supplemental Information
Date: March 25, 2015

Dr. Hawley / Counsel:

On March 23, 2015, we submitted Draft 2 of the 2015-16 USP Budget (“Draft 2”) along with a cover memo that included background information and explanations. Pursuant to discussions between Dr. Hawley and Dr. Sanchez, we are hereby providing supplemental information to explain in greater detail some of the year-to-year variances by activity. It is worth repeating, the 2014-15 USP Budget was developed under a different format than the current 2015-16 version, with different categorizations, and thus the comparisons between years is not an exact science. Still, District staff members made their best effort to cross-walk items between the two formats in a manner that would facilitate understanding of how the budget relates to USP implementation.

It is the sincere hope of Dr. Sanchez and of the Special Master that this supplemental information will help us all focus our review of Draft 2 so that our budget discussions during the Summit are productive and help lead us to a final budget with little (or no) major issues to delay adoption. Over the past two years we have all worked together to increase transparency, to reduce significantly – or to eliminate – controversial or questionable allocations, and to align with greater accuracy the 910(G) funding with USP implementation. There is far greater alignment and transparency now than in the four-decade history of this case, and we continue to improve monitoring and reporting functions for the future. We hope to keep moving forward together in this endeavor as partners rather than adversaries – particular in the face of continued attacks on 910(G) funding and other school funding.

The following table identifies major variances (increases and/or decreases) in Draft 2, along with any other information that may help in your review. All dollar amounts are rounded up or down and are approximate.

Activity	Budget Code	Old Project	Comments
I.1 Internal Compliance Monitoring	0101	11	There is not a significant difference between the 2014-15 funding and the proposed 2015-16 funding. The increases for program evaluation (all CIPDA Department items) will likely be moved to activity 1001 – EBAS Implementation.
I.2 Annual Report	0102	11	Increased by \$170k additional staff to support the development, data tracking and monitoring, and implementation of the annual reporting.
I.3 Court Orders and Miscellaneous	0103	11	There is not a significant difference between the 2014-15 funding (\$2,415,447) and the proposed 2015-16 funding (\$2,196,573) NOTE: the 2,014-15 amount listed (\$10,757,239) is incorrect as it includes an amount of \$8,341,792 for ELD/OCR that should have been, and will be, moved to the “2014-15 Allocation Amount” under activity 0104 in Draft 3.
I.4 OCR / ELL	0104	14	In Draft 2, there is a reduction between the amount allocated in 2014-15 (\$8,341,792) and the proposed 2015-16 amount (\$7,973,758) – even though the District added an “OCR Contingency Fund” for future OCR compliance costs. The District is still revising the appropriate amount to allocate for this activity as we are still in the process of finalizing our assessment of ELD needs at school sites. See 0504 and 0704. Funding for the Language Acquisition Department supports three activities: 0104 (OCR/ELL); 0504 (Dual-Language); and 0704 (Translation and Interpretation Services). In Draft 2, there are some line items (i.e. the Meaningful Access Coordinator) that were mistakenly categorized under 0504 that should have been, and will be, re-categorized to 0104 and/or 0704 in Draft 3.
I.5 Contingency	0105	15	This amount will fluctuate depending on what items are added/removed during the budget development process.

II.1 Comprehensive Boundary Plan	0201	2	The District will review boundaries every year to identify oversubscribed schools, to propose changes, and to find ways to improve integration where possible through boundary revisions. In 2015-16, increased funding will support the annual review and, potentially, actions based on resultant recommendations.
II.2 Comprehensive Magnet Plan	0202	2	<p>Increased by \$1.64M, major changes include increased investments to improve student achievement: AVID at Utterback (\$230k) and at THS (\$230k) to improve student achievement at those sites; after-school tutoring; certified push-in support, reducing class size, and providing certified support for increased teacher-teaming and PLCs. The District is still in the process of developing components of the CMP per the Court's Order and items within this activity may change accordingly.</p> <p>There is a line item for "Expanded Dual Languages" (including the following comment "World Languages Strategic Plan") that should be, and will be, moved to activity 0504.</p>
II.3 Application and Selection Process (+APOS)	0203	2	<p>Using the cross-walk method, staff cross-walked the entire budget of School Community Services "SCS" (\$546k) from the 2014-15 Budget allocation in Project 2 to this activity.</p> <p>Using the more-accurate allocation method for the 2015-16 proposal, staff allocated \$182k and divided the SCS budget among several activities. As a result, it appears as though there is a significant reduction in this activity.</p>
II.4 Marketing, Outreach, and Recruitment Plan	0204	2	Increased by \$215k to implement the MORE action plan.
II.5 Student Assignment PD	0205	2	There is \$100,000 currently allocated for "Plan, Research , Development." This amount should have been coded to activity 0201, and will be transferred to that activity in Draft 3. There are other amounts in this activity that should be, and will be, recoded to the appropriate activity in Draft 3.
III.1 Magnet Transportation	0301	3	There is no significant variance between years.

III.2 Incentive Transportation	0302	3	Transportation department may revise this amount to align with the proportion of eligible riders, if possible.
IV.1 Hire or Designate USP Positions	0401	1	This activity has no additional cost.
IV.2 Outreach, Recruitment, Retention Plan	0402	1	Increased by \$380k to implement the ORR action plan, major changes include an increase in FTE from 4 in 2014-15, to 8.4 in 2015-16.
IV.3 Interview Committees/Instrument /App Pool	0403	1	This activity has no additional cost.
IV.4 Evaluate Applicant Offer Rejections	0404	1	This activity has no additional cost.
IV.5 Diversity Assignment	0405	1	This activity has no additional cost.
IV.6 Experience Assignment	0406	1	This activity has no additional cost.
IV.7 Retention	0407	1	This activity has no additional cost.
IV.8 Reduction in Force (RIF) Plan	0408	1	This activity has no additional cost.

A note about PD and Teacher/Principal Support:

Using the cross-walk method, the Project 12 budget from 2014-15 (\$2.1M) was divided as follows: 50% (\$1.1M) to activity 0409, and 50% divided nine ways to activities 0410-0418 (\$122k each). Using the more-accurate allocation method for the 2015-16 proposal, the increased total of \$2.8M between the ten projects (0409 through 0418) was divided with greater purpose and accuracy. As a result, the variances for activities 0409 through 0418 should not be used to make one-to-one, yearly comparisons.

IV.9 USP-Related PD and Support	0409	12	There is no significant variance between years.
IV.10 First-Year Teacher Pilot Plan	0410	12	There is no significant variance between years.
IV.11 Evaluation Instruments	0411	12	Increased by \$257k for student surveys and additional PD.
IV.12 New Teacher Induction Program	0412	12	Increased by \$687k for additional Teacher Mentors funded from 910(G). Approximately 75% of their time relates to this activity, so approximately 75% of the total FTE (18) for Teacher Mentors was allocated to this activity.
IV.13 Teacher Support Plan	0413	12	Decreased by \$103k as a result of re-categorization.
IV.14 Aspiring Leaders Plan	0414	12	There is no significant variance between years.
IV.15 PLC Training	0415	12	There is no significant variance between years.
IV.16 USP Training Plan	0416	12	This activity has no additional cost.
IV.17 Ongoing PD on Hiring Process	0417	12	There is no significant variance between years.
IV.18 Observations of Best Practices	0418	12	There is no significant variance between years.

A note about LSCs:

In prior years, the District allocated approximately 55 LSCs and distributed them to schools in the following manner: 1 LSC for every high school and middle school, .5 LSC for smaller middle schools, K8s, and elementary schools. In 2015-16, the District created a formula for LSCs whereby each middle school will receive 1 LSC, and larger elementary schools (with more than 500 students) will also receive 1 LSC. This increased the total number of LSCs from 55 to 65. LSCs are divided between 10 USP activities, as outlined below. Each of the ten activities involving LSC support is indicated with italicized brackets [*LSC#*] so they can be clearly identified.

V.1 ALE Access and Recruitment Plan	0501	4	Decrease of \$415k reflects the re-categorization of resources, particularly LSCs to other activities, including 0502. [<i>LSC1</i>]
V.2 UHS Admissions/Outreach/Recruitment	0502	4	Increased by \$466k to implement new admissions process and to reflect the portion of LSC salaries that supports this activity. [<i>LSC2</i>]
V.3 Pursue OELAS Extension	0503	4	This activity has no additional cost.
V.4 Build/Expand Dual Language Programs	0504	4	See 0104 and 0704. Funding for the Language Acquisition Department supports three activities: 0104 (OCR/ELL); 0504 (Dual-Language); and 0704 (Translation and Interpretation Services). In Draft 2, there are some line items (i.e. the Meaningful Access Coordinator) that were mistakenly categorized under 0504 that should have been, and will be, re-categorized to 0104 and/or 0704 in Draft 3. Also, see 0202 above, there is a line for \$150,000 for expanding dual language programs that should be, and will be, moved to 0504.
V.5 Placement Policies and Practices	0505	4	Reduced by \$384k to reflect elimination of psychologists.
V.6 Dropout Prevention and Retention Plan	0506	5	Reduced by \$800k as a result of re-categorization; the allocated amount set in 2014-15 was an estimate as the plan had yet to be finalized.
V.7 Data Dashboard (Flags and Policies)	0507	5	This activity has no additional cost.

V.8 CRC and Student Engagement PD	0508	6	There is no significant variance between years.
V.9 Multicultural Curriculum	0509	6	Increase by \$485k, major changes include: two coordinators transferred from Student Services; increase in Fine Arts of 2.5 FTE (18.7 allocated in 2015-16 versus 16.25 allocated in 2014-15)(see reduction of 1 Fine Arts FTE in 0801). The total amount for fine arts between 2014-15 and 2015-16 has not changed significantly, if at all.
V.10 Culturally Relevant Courses	0510	6	Increase of approximately \$290k represents additional costs associated with commitments made to the Parties and Special Master.
V.11 Targeted Academic Interventions and Supports	0511	5	In the 2014-15 USP Budget, this activity was funded from Project 5. While it appears as an increase of \$180k, the apparent increase is primarily a function of the reorganization / re-categorization of resources to implement this activity between the student services department and LSCs. <i>[LSC3]</i>
V.12 Quarterly Information Events	0512	5	While this appears as a reduction of almost \$240k, the apparent decrease is primarily a function of the reorganization / re-categorization of resources to implement this activity as a function of the student services department rather than a reduction in services or events. The full allocation from 2014-15 was an over-estimate that was artificially-created using the “cross-walk” method. Some of the apparent decrease was re-categorized into activity 0511 .
V.13 Collaborate with Local Colleges and Universities	0513	5	There is no significant variance between years.
V.14 AAAATF Recommendations	0514	5	This amount is incorrect for two reasons: (1) the dollar amounts for the Mexican American Student Services Department should be, and will be, removed from this activity and redistributed in Draft 3; (2) the \$500,000 allocation is missing and will be included in Draft 3.
V.15 Referrals, Evaluations, and Placements	0515	5	This activity has no additional cost.
V.16 Supportive and Inclusive Environments	0516	6	While this appears as an increase of almost \$145k, the apparent increase is primarily a function of the reorganization / re-categorization of resources to implement this activity as a function of LSCs. <i>[LSC4]</i>

VI.1 Restorative Practices and PBIS (RPPSCs)	0601	7	While this appears as a reduction of almost \$130k, the apparent decrease is primarily a function of the reorganization / re-categorization of resources to implement this activity as a function of the student services department and LSCs. <i>[LSC5]</i>
VI.2 GSRR	0602	5, 7	While this appears as an increase of almost \$141k, the apparent increase is primarily a function of the reorganization / re-categorization of resources to implement this activity as a function of the Student Services department and LSCs. <i>[LSC6]</i> Because the four Student Services directors serve as the ABSCs, their department budgets are mathematically split between the activities they support in this role. No specific cost was “cross-walked” from the 2014-15 USP Budget to this activity.
VI.3 Student Discipline Training for Sites	0603	5, 7	While this appears as a reduction of almost \$375k, the apparent decrease is primarily a function of the reorganization / re-categorization of resources to implement this activity as a function of the student services department rather than as a joint function of student services and LSCs. <i>[LSC7]</i>
VI.4 Discipline Roles and Responsibilities	0604	7	This activity has no additional cost to 910(G) funds, and only a minimal cost to M&O.
VI.5 Discipline Data Monitoring	0605	5, 7	In the 2014-15 USP Budget, this activity was supported by multiple departments funded from Projects 5 and 7. While it appears as a reduction of almost \$500k, the apparent decrease is primarily a function of the reorganization / re-categorization of resources to implement this activity between the student services department and LSCs. <i>[LSC8]</i> Because the four Student Services directors serve as the ABSCs, their department budgets are mathematically split between the activities they support in this role. No specific cost was “cross-walked” from the 2014-15 USP Budget to this activity. This activity is one of ten LSC-assigned activities and, therefore, there is an associated cost of one-tenth of the total cost for LSCs.

VI.6 Corrective Action Plans	0606	7	Because the four Student Services directors serve as the ABSCs, their department budgets are mathematically split between the activities they support in this role. No specific cost was “cross-walked” from the 2014-15 USP Budget to this activity. <i>[LSC 9 and 10]</i>
VI.7 Successful Site-Based Strategies	0607	7	
VII.1 Family Center Plan	0701	8	Increased by \$360k to align with Family Engagement Plan, including funding for two additional centers in 2015-16.
VII.2 Family Engagement Resources	0702	8	Under the reorganization of family engagement, this activity has very little additional cost. The 2014-15 allocation was created using a mathematical “cross-walk” to split Project 8 three ways; in 2015-16 the split was 80-10-10 between the three activities.
VII.3 Tracking Family Engagement	0703	8	Under the reorganization of family engagement, this activity has very little additional cost. The 2014-15 allocation was created using a mathematical “cross-walk” to split Project 8 three ways; in 2015-16 the split was 80-10-10 between the three activities.
VII.4 Translation and Interpretation Services	0704	8	See 0104 and 0704. Funding for the Language Acquisition Department supports three activities: 0104 (OCR/ELL); 0504 (Dual-Language); and 0704 (Translation and Interpretation Services). In Draft 2, there are some line items (i.e. the Meaningful Access Coordinator) that were mistakenly categorized under 0504 that should have been, and will be, re-categorized to 0104 and/or 0704 in Draft 3.
VIII.1 Extracurricular Equitable Access Plan	0801	7	There is no significant variance between years.
VIII.2 Data Reporting System (Extracurricular)	0802	7	There is no significant variance between years.
IX.1 Multi-Year Facilities Plan	0901	9	<p>The Project 9 total allocation from 2014-15 was \$1,677,967, but the amount listed on Draft 2 for 2014-15 is \$2,120,587 (which includes an allocation for \$400k for UHS portables from Project 11). The \$400k was not expended, but was initially allocated.</p> <p>Aside from the UHS portable allocation, the amount allocated in 2014-15 and proposed for 2015-16 are substantially the same.</p>

IX.2 Multi-Year Technology Plan	0902	10	See MYTP, the District would like to fund the needs as prioritized in the plan – specifically, racially concentrated schools in need based on the TCI.
IX.3 Technology PD for Classroom Staff	0903	10	Increased by approximately \$650k, major changes include the following: increases for Technology Teacher Liaison PD stipend (\$476k), and PD Academic Trainers (\$190k, re-categorized from Project 12).
X.1 EBAS Implementation	1001	13	Increased by approximately \$500k, major changes include the following: reductions in cost for ATI Galileo and ERP; increases in supplemental funding for Student Information System (SIS), intervention module, infrastructure for data warehouse, and EBAS program.
X.2 EBAS Training and Evaluation	1002	13	There is no significant variance between years.
X.3 Budget Process and Development	1003	11	There is no significant variance between years.
X.4 Budget Audit	1004	11	There is no significant variance between years.
X.5 Notice and Request for Approval	1005	11	This activity has no additional cost.