

This protocol is designed for use by school leaders to gather recommendations from SACs, school accountability committees and LATs, leadership advisory teams (or another staff committee) regarding budget priorities. These priorities will inform the 2015-2016 Student Based Budgeting (SBB) development for schools. Gathering recommendations from both SACs and school staff is an important step in the budget development process that aligns with district policy AE-1, “prior to the adoption of the school budget for the upcoming school year, the SAC will provide recommendations to the principal on school priorities for spending school moneys”.

**Roles:**

Facilitator

- The facilitator’s role is to help the group remain focused on how the budget priorities support the core values of the school, community, and/or are aligned with the school improvement plan.
- The facilitator should open by explaining the purpose of the process is not to set the budget or allocate funds or resources, but rather to provide recommendations on the priorities for school funds.

Timekeeper (can be the same as the facilitator)

- Ensures that the meeting stays on track-reviews the time schedule at the beginning of the meeting.

Recorder

- The recorder is responsible for helping the facilitator capture the input on priorities noted by the group and for scribing the final list of priorities to be published for the community (can be part of the minutes for the SAC meeting). While recording use chart paper or a projection device to ensure that the recorder is accurately capturing the group’s thinking.

**Process: (times listed are guidelines, adjust to meet needs and schedules for your group)**

1. (5 Minutes) Review the committee/group norms prior to beginning the conversation to ensure all stakeholders voices are heard and valued per the operating norms of the team.
2. (15-30 minutes) Discuss as a whole group the core values and school improvement plan for the school community in the upcoming school year. Take time to discuss any major initiatives or resource needs for the year ahead. Include information about notable trends that would impact next year’s budget (increasing or declining enrollment numbers). Determine core values that the school will anchor to when making budget decisions. These core values can include small class sizes for a particular grade level or content area, instructional resources/development for teachers, etc.
  - a. OPTIONAL Exercise: Have the group write down individually their ideas about the core values or non-negotiable for students in their school. Then share in pairs or whole-group.
  - b. OPTIONAL Exercise: A Principal recap of the UIP focus, including major improvement strategies, major initiatives, and resource needs could be helpful if the group is unfamiliar with this aspect of the school improvement planning process.
3. (15 minutes) Allow smaller groups (if appropriate—a SAC may only have 7 members and thus may conduct this step as a whole group) to discuss the items in step 1 and add to the list; then develop a list of priorities noting reasons for the order of items. Select a person to report out to the whole group.
4. (15 minutes) Have each group report out and allow for clarifying questions by other groups.
5. (15 minutes) Following the report out, the facilitator can identify common priorities and facilitate a common priority list for the whole group. This will be captured as the list of recommendations on priorities from the SAC to be reported to the community.