

## SB0110S01 compared with SB0110

~~{deleted text}~~ shows text that was in SB0110 but was deleted in SB0110S01.

inserted text shows text that was not in SB0110 but was inserted into SB0110S01.

**DISCLAIMER:** This document is provided to assist you in your comparison of the two bills. Sometimes this automated comparison will NOT be completely accurate. Therefore, you need to read the actual bills. This automatically generated document could contain inaccuracies caused by: limitations of the compare program; bad input data; or other causes.

Senator Aaron Osmond proposes the following substitute bill:

### SCHOOL-BASED BUDGETING AMENDMENTS

2013 GENERAL SESSION

STATE OF UTAH

**Chief Sponsor: Howard A. Stephenson**

House Sponsor: Daniel McCay

Cosponsors:

Scott K. Jenkins

Jerry W. Stevenson

J. Stuart Adams

Peter C. Knudson

Stephen H. Urquhart

Margaret Dayton

Mark B. Madsen

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#### LONG TITLE

##### General Description:

This bill ~~{requires a school district to distribute certain revenues to schools in accordance with a weighted student formula and requires a principal to determine how to use revenues available to the school to meet students' needs}~~ allows local school boards to approve school-based budgeting.

##### Highlighted Provisions:

This bill:

- ▶ ~~{requires a school district to distribute, by July 1, 2017, no less than 85% of~~

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~~Minimum School Program revenues to schools;~~

- ~~→ requires a school district to allocate Minimum School Program revenues distributed to a school in accordance with a weighted student formula, with exceptions;~~
- ~~→ directs~~ if approved by a local school board, allows a school principal to:
  - prepare a school budget;
  - consult with an advisory committee in preparing a school budget; and
  - submit the school budget to the local school board for approval;
- ▶ requires a school budget to be aligned with and support the school instructional, academic, and student achievement goals;
- ▶ ~~{requires}~~ if approved by a local school board, allows a school principal to determine how to use revenue available to the school to meet the needs of the school's students; and
- ▶ requires a school district to publish on the school district's website information on revenue available to a school participating in school-based budgeting and the school budget.

### Money Appropriated in this Bill:

None

### Other Special Clauses:

None

### Utah Code Sections Affected:

AMENDS:

**53A-1a-108.5**, as enacted by Laws of Utah 2002, Chapter 324

ENACTS:

**53A-2-501**, Utah Code Annotated 1953

**53A-2-502**, Utah Code Annotated 1953

**53A-2-503**, Utah Code Annotated 1953

**53A-2-504**, Utah Code Annotated 1953

**53A-2-505**, Utah Code Annotated 1953

**53A-2-506**, Utah Code Annotated 1953

~~{ **53A-2-507**, Utah Code Annotated 1953~~

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*Be it enacted by the Legislature of the state of Utah:*

Section 1. Section **53A-1a-108.5** is amended to read:

### **53A-1a-108.5. School improvement plan.**

(1) (a) Each school community council shall annually evaluate the school's U-PASS test results and use the evaluations in developing a school improvement plan.

(b) In evaluating U-PASS test results and developing a school improvement plan, a school community council may not have access to data that reveal the identity of students.

(2) Each school improvement plan shall:

(a) identify the school's most critical academic needs;

(b) recommend a course of action to meet the identified needs;

(c) list any programs, practices, materials, or equipment that the school will need to implement its action plan to have a direct impact on the instruction of students and result in measurable increased student performance; and

(d) describe how the school intends to enhance or improve academic achievement, including how ~~the~~ financial resources available to the school, such as School LAND Trust Program money received under Section 53A-16-101.5 and state and federal grants, ~~the~~ or, if approved under Section 53A-2-504, the school budget will be used to enhance or improve academic achievement.

(3) The school improvement plan shall focus on the school's most critical academic needs but may include other actions to enhance or improve academic achievement and community environment for students.

(4) The school principal shall make available to the school community council the school budget and other data needed to develop the school improvement plan.

(5) The school improvement plan shall be subject to the approval of the local school board of the school district in which the school is located.

(6) A school community council may develop a multiyear school improvement plan, but the plan must be presented to and approved annually by the local school board.

(7) Each school shall:

(a) implement the school improvement plan as developed by the school community council and approved by the local school board;

(b) provide ongoing support for the council's plan; and

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(c) meet local school board reporting requirements regarding performance and accountability.

Section 2. Section 53A-2-501 is enacted to read:

### Part 5. School-based Budgeting Act

#### 53A-2-501. Title.

This part is known as the "School-based Budgeting Act."

Section 3. Section 53A-2-502 is enacted to read:

#### 53A-2-502. Definitions:

##### As used in this part:

~~(1) "Minimum School Program revenues" means the following revenues received by a school district:~~

~~(a) state revenues distributed to a school district for a program funded by a line item appropriation designated as follows:~~

~~(i) Basic School Program;~~

~~(ii) Related to Basic Programs; or~~

~~(iii) Voted and Board Leeway Programs;~~

~~(b) revenue from a basic levy imposed by the school district under Section 53A-17a-135, except proceeds which exceed the cost of a school district's basic program and are deposited into the Uniform School Fund pursuant to Section 53A-17a-135;~~

~~(c) revenue from a voted local levy imposed by the school district under Section 53A-17a-133; and~~

~~(d) revenue from a board local levy imposed by the school district under Section 53A-17a-164.~~

~~(2) "Weighted student formula" means a formula for distributing money to schools in which a base allocation is set for each student and weights are added to the base allocation depending on student need or other factors? Purposes of school-based budgeting.~~

The purposes of school-based budgeting are to:

(1) create a system of excellent schools in Utah led by great principals who have the authority, resources, and responsibility to teach all students well;

(2) engage those closest to the students in making key decisions that impact the

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students:

(3) empower schools and hold them accountable for results; and

(4) develop a simple, and transparent approach to help schools achieve results for

students.

Section 4. Section 53A-2-503 is enacted to read:

**53A-2-503.** ~~{ Purposes}~~ Local school board to approve or deny creation of school-based {budgeting.

~~— The purposes of}~~ budget -- Revenues for a school-based {budgeting are to:

~~— (1) create a system of excellent schools in Utah led by great principals who have the authority, resources, and responsibility to teach all students well;~~

~~— (2) engage those closest to the students in making key decisions that impact the students;~~

~~— (3) empower schools and hold them accountable for results;~~

~~— (4) provide for fair and transparent funding that schools can rely on annually;~~

~~— (5) allow dollars to follow each student;~~

~~— (6) put the resources in the schools;~~

~~— (7) provide a similar level of resources to students with similar characteristics;~~

and

~~— (8) develop an equitable, simple, and transparent approach to help schools achieve results for students;} budget.~~

(1) A school principal may petition the principal's local school board for the opportunity to create a school-based budget.

(2) The local school board shall approve or deny a principal's request to create a school-based budget.

(3) If a local school board approves a principal's request to create a school-based budget, the local school board shall tell the principal the total amount of revenue that will be allocated to the school for purposes of creating the school-based budget.

Section 5. Section 53A-2-504 is enacted to read:

**53A-2-504.** ~~{ Distribution of revenue to schools in accordance with a weighted student formula.~~

~~— (1) Beginning on July 1, 2017, a school district shall distribute no less than 85% of~~

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### Minimum School Program revenues to schools:

~~— (2) (a) Except as provided in Subsections (3) and (4), Minimum School Program revenues distributed to schools shall be allocated in accordance with a weighted student formula established by the local school board.~~

~~— (b) A weighted student formula shall allocate revenue distributed to schools under Subsection (1) in a fair and equitable manner that takes into account student needs.~~

~~— (3) Revenue a school district receives for a program funded through a Related to Basic Programs line item appropriation that is restricted for a certain purpose may be allocated to schools in a manner other than a weighted student formula.~~

~~— (4) To mitigate a decrease in resources available to a school, a school district may phase in the implementation of a weighted student formula over a five-year period.~~

~~— Section 6. Section 53A-2-505 is enacted to read:~~

~~— 53A-2-505. School budget -- Principal to determine use of school revenue.~~

~~(1) {The} If a principal's request to create a school-based budget is approved under Section 53A-2-503, the principal of {each} a school shall:~~

~~(a) prepare a budget for the expenditure of revenue {distributed} allocated to the school under Section {53A-2-504} 53A-2-503;~~

~~(b) consult with an advisory committee appointed under Subsection (2) in preparing the budget; and~~

~~(c) submit the budget to the local school board for approval.~~

~~(2) (a) The principal shall appoint an advisory committee to:~~

~~(i) review the instructional, academic, and student achievement goals of the school;~~

~~and~~

~~(ii) recommend how a school budget may be created to achieve the goals described in Subsection (2)(a)(i).~~

~~(b) The advisory committee:~~

~~(i) shall include a parent or guardian member of the school community council who serves as chair of the school community council; and~~

~~(ii) may include the following personnel employed at the school:~~

~~(A) administrators;~~

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(B) teachers; and

(C) instructional support personnel.

(3) A school budget prepared and approved under Subsection (1) shall be aligned with and support:

(a) the goals described in Subsection (2)(a)(i); and

(b) the school improvement plan developed under Section 53A-1a-108.5.

(4) (a) If a local school board disapproves a school budget submitted under Subsection (1), the local school board shall provide a written explanation of why the budget was disapproved and request that the principal revise the budget.

(b) The principal shall submit a revised school budget to the local school board for approval.

(5) In preparing a school budget, a principal shall determine:

(a) how to use revenue available to the school to meet the needs of the school's students;

(b) the number and type of both licensed and classified staff positions;

(c) the teaching assignments or other work assignments of licensed and classified personnel at the school;

(d) how to provide for instructional support services, such as curriculum development or professional development;

(e) how to provide for building and grounds maintenance;

(f) what instructional materials to acquire, subject to the requirements of Sections 53A-13-101 and 53A-14-107; and

(g) what other resources are necessary for the education of the school's students.

Section ~~{7}6~~. Section ~~{53A-2-506}~~ **53A-2-505** is enacted to read:

~~{53A-2-506}~~ **53A-2-505. School budget -- Employee salaries and benefits.**

(1) A ~~{school shall be charged for, and a}~~ school budget shall include revenue and **planned** expenditures for ~~{,}~~ the actual cost of the salaries and benefits of personnel employed at the school.

(2) **If a local school board approves a school-based budget under Section 53A-2-504, a school shall be charged for the actual cost of the salaries and benefits of personnel employed at the school.**

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Section ~~{8}~~7. Section ~~{53A-2-507}~~53A-2-506 is enacted to read:

~~{53A-2-507}~~53A-2-506. Revenue and budget information published on school district website.

A school district shall publish on the school district's website:

~~(1) the amount of revenue {distributed}~~allotted by the local school board to each school ~~{in accordance with Section 53A-2-504}~~;

~~———— (2) how the total revenues distributed to a school are calculated using a weighted pupil formula and other allocation formulas;~~

~~———— (3) how a weighted pupil formula is phased in over a five-year period pursuant to Section 53A-2-504; and~~

~~———— (4) approved to create a school-based budget; and~~

~~(2) each school budget~~ approved by the local school board.

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### Legislative Review Note

~~———— as of 12-3-12 7:04 AM~~

~~———— Office of Legislative Research and General Counsel}~~