

**MEMORANDUM**

**TO:** Members, Utah State Board of Education

**FROM:** Scott Jones  
Associate Superintendent

**DATE:** February 4-5, 2016

**INFORMATION/**

**ACTION:** SFY16 Budget Reporting

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**Background:**

In August 2015, the Finance Committee approved a budget reporting schedule for State Fiscal Year (SFY) 16 for directors of USOE, USOR, and USDB to provide budget updates to the Finance Committee.

**Key Points:**

The Finance Committee will have the opportunity to discuss information provided by the Career and Technology Education, School Children's Trust, and State Board of Education Sections.

**Anticipated Action:**

The Committee will receive budget reports from the various sections.

**Contact:** Scott Jones, Associate Superintendent, 801-538-7514

# Career & Technical Education

## FY2016 Budget Update

Thalea Longhurst, Director CTE

Dr. Sydnee Dickson, Acting Superintendent

February 4, 2016



**CTE**<sup>®</sup>

Learning that works for Utah

# Background Information

- Federal Agency: OCTAE (Office of Career, Technical, & Adult Education)
- Utah received \$12,501,001 in federal FY16 Perkins funds
  - 85% flows out in formula to secondary and post-secondary public education
  - 10% leadership funds
  - 5% administration funds
- Utah received \$85,351,100 in state CTE Add-on funds FY16 that flow directly through to secondary LEAs with approved CTE programs
  - CTE WPU = \$2,837

# Background Information

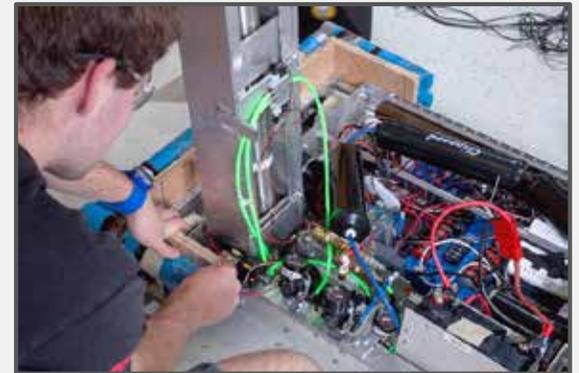
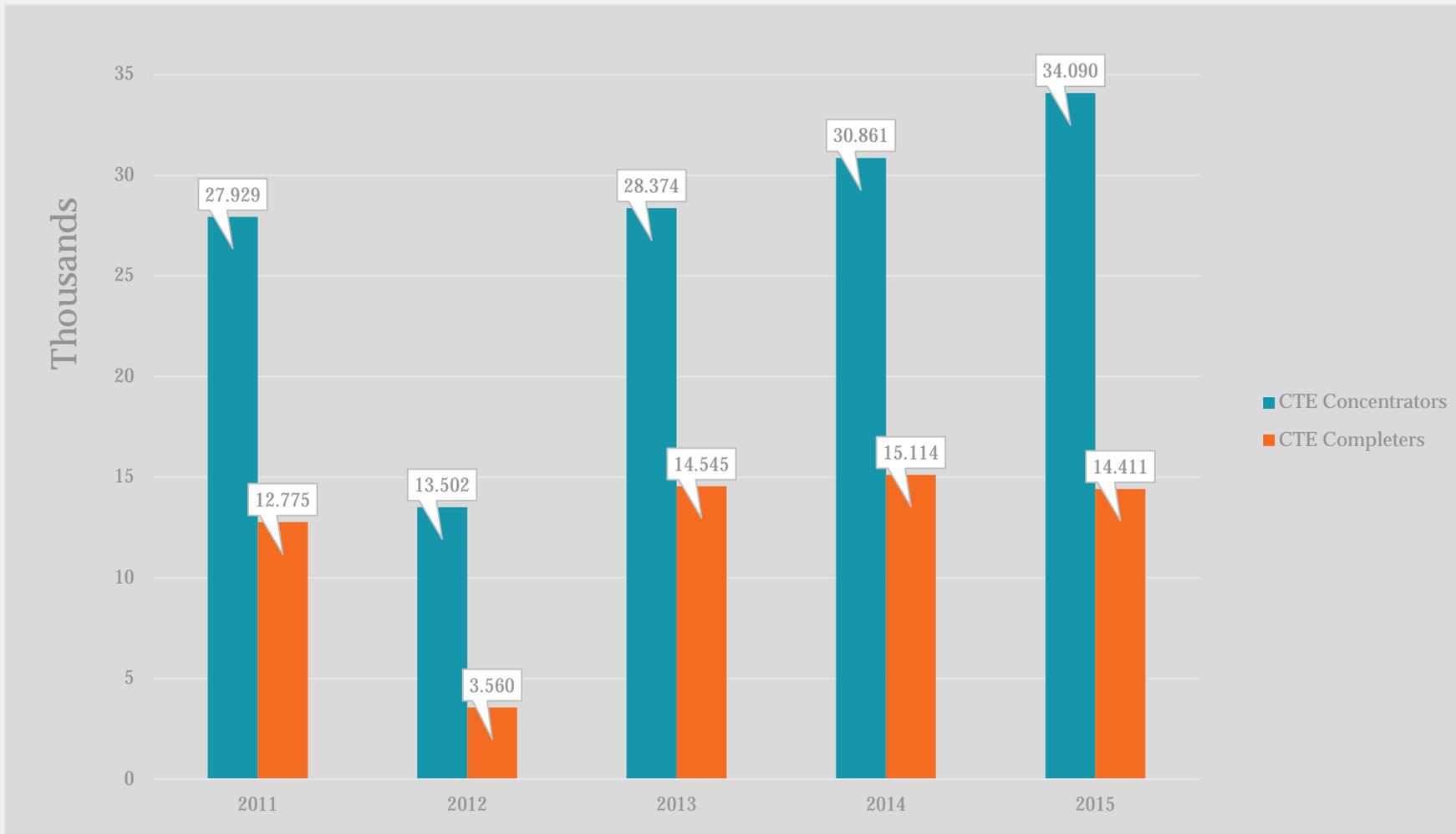
- Career & Technical Administration administers these programs:
  - Carl Perkins Career & Technical Education Improvement Act of 2006
    - Career Pathways
    - Civil Rights Reviews
  - Utah CTE Programs
    - Agriculture Education
    - Business & Marketing Education
    - Family & Consumer Sciences Education
    - Health Science Education
    - Information Technology Education
    - Skilled & Technical Education
    - Technology & Engineering Education
  - College & Career Awareness (7<sup>th</sup> grade)
  - Work-Based Learning
  - CTE Skill Certification
- Career & Technical Student Organizations (DECA, FBLA, FCCLA, FFA, HOSA, SkillsUSA, TSA)
- Summer Agriculture programs
- Comprehensive Counseling & Guidance Program
- Computer Technology & Keyboarding
- General Financial Literacy
- IT Academy

# Participation Data



- School year 2014-2015
  - 143,484 secondary participants (not including Computer Technology or GFL)
    - 74,850 male
    - 68,634 female
  - 14,411 CTE Pathway Completers (3.0 credits in a pathway)
  - 34,090 CTE Pathway Concentrators (1.5 credits in a pathway)
  - 110,407 CTE Skill Certificates (passing score 80%, written + performance skills)
  - 15,276 Industry Certificates
  - 75,496 CTE Concurrent Enrollment Credits
  - 22,125 CTSO participants
- LEAs delivered 94% of all CTE membership in grades 9-12 à 6% delivered by ATCs & USHE

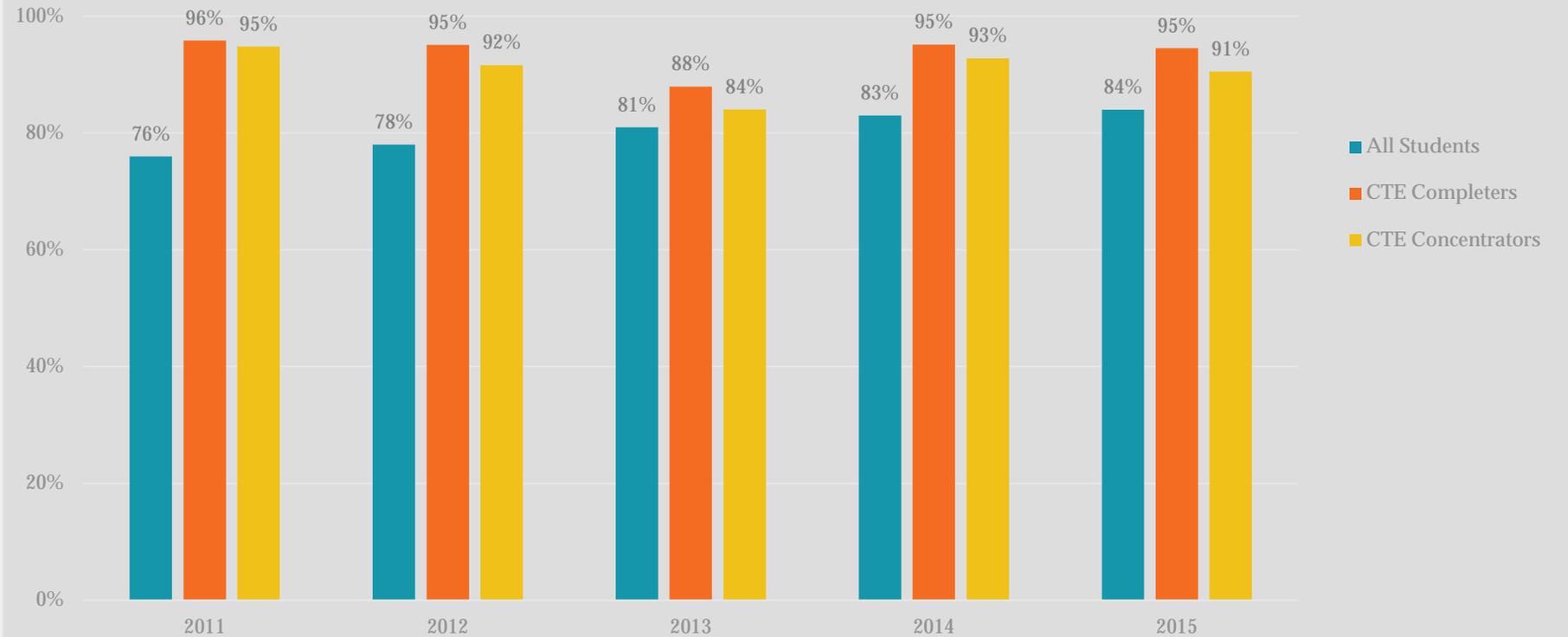
# CTE Completers & Concentrators



# CTE Graduation Rates



GRADUATION RATES



# CTE Skill Certification /Industry Exams

- SY14-15:
  - 175,797 CTE Skill Certification assessments passed
  - 13,013 Industry assessments passed
  - Grades 9-12



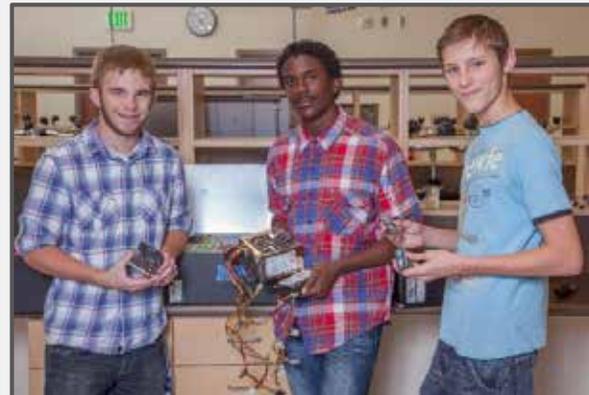
# School Participation Data - CTE



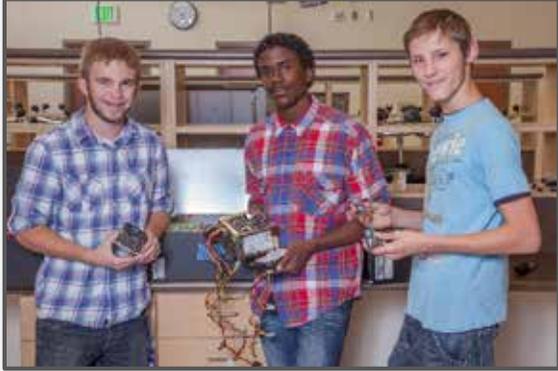
- 1.0 CTE credit required for graduation grades 9-12
- All 41 school districts have approved CTE programs grades 9-12
- 9 Charter Schools have approved CTE programs grades 9-12
- College & Career Awareness (7<sup>th</sup> grade)
  - 163 District schools
  - 38 Charter schools

# Computer Technology & Keyboarding

- 0.50 FTE (time and effort)
- Keyboarding 3<sup>rd</sup> - 7<sup>th</sup> grade:
  - Utah Educational Technology Core
  - 3<sup>rd</sup> grade assessment
  - Designed to reinforce Utah Literacy outcomes
- Computer Technology 9<sup>th</sup> -12<sup>th</sup> grade:
  - HS Graduation requirement
  - Digital literacy taskforce recommendations
  - Computer Technology/Exploring Computer Science
  - 8<sup>th</sup> grade Digital Literacy
  - High school Digital Studies



# General Financial Literacy



- HS graduation requirement
  - 0.50 credit
- 0.78 + 0.25 FTE
- SB 40 (2014)
  - End-of-course assessment, online resources, updated standards, teacher endorsement, professional development
- \$375,300 including FTE and program costs

# CTE Staffing

Revised: 12/14/15

USOE - Career & Technical Education		
25.18 FTEs	Funding Source	
	Federal	State
1.0 Director	0.50	0.50
2.0 Coordinator	2.00	
11.68 Education Specialist	4.00	7.68
1.0 Financial Analyst II		1.00
1.0 Trainer III		1.00
1.0 Trainer I	1.00	
1.0 Administrative Secretary		1.00
3.0 Executive Secretary		3.00
1.0 Office Specialist II		1.00
2.5 Office Specialist I		2.50

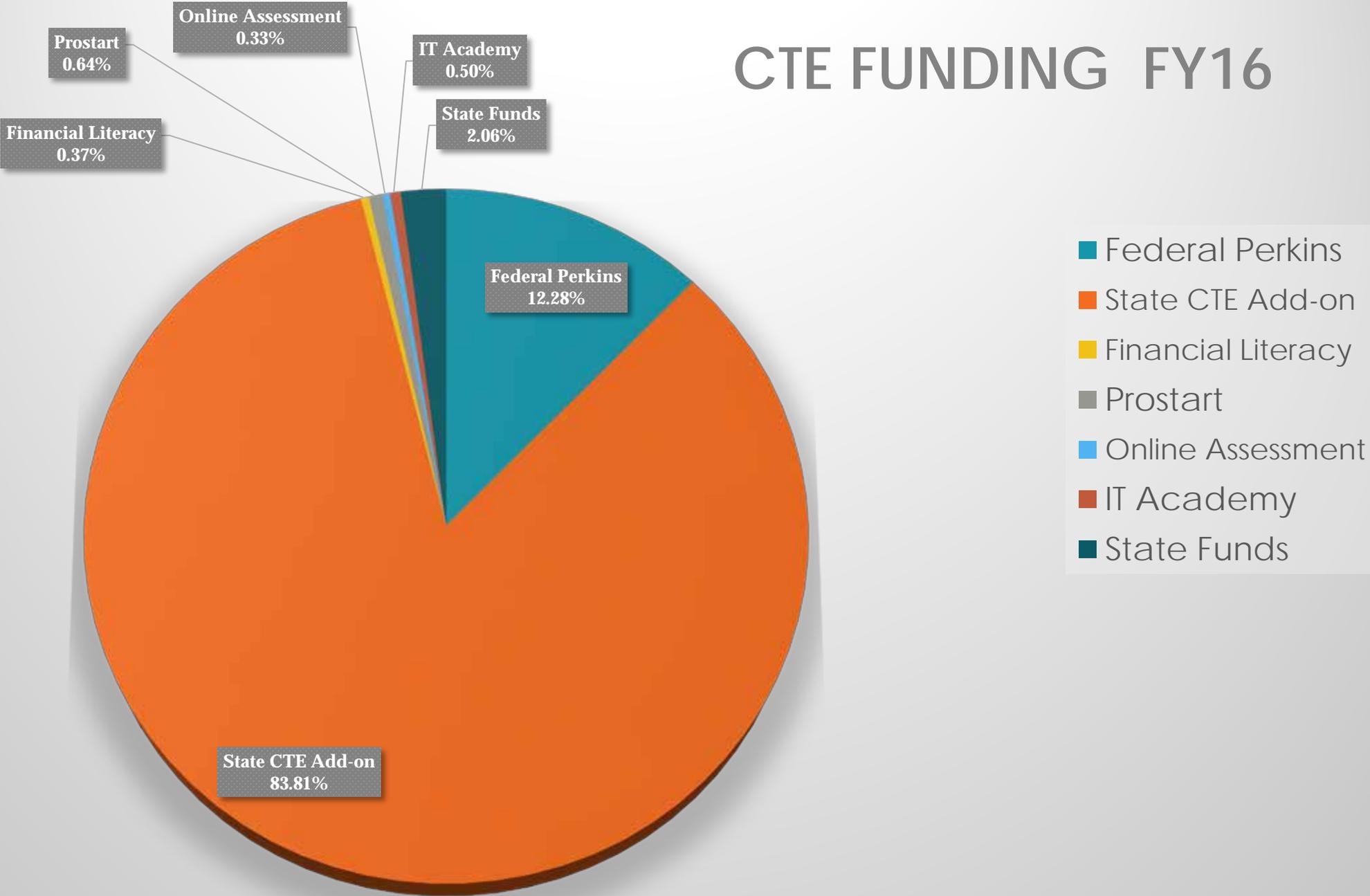
Career and Technical Education	
Thalea Longhurst, Director	
<p><b>Callie Brewer</b>, Finance in the Classroom Website &amp; Training  <b>Kris Dobson</b>, Utah Career Resource Network  <b>Shannon Fischio</b>, Web Management  <b>Dawn Stevenson</b>, General Financial Literacy  <b>Diane Sutton</b>, Accounting Officer  <b>Susan Thomas</b>, CTE Resources</p>	<p><b>Patti Godfrey</b>, Administrative Secretary</p> <ul style="list-style-type: none"> <li>• CTE Student Organizations (CTSO) Leadership</li> <li>• CTE Staff Meeting Management</li> </ul>
Coordinator – Brian Olmstead	Coordinator – Wendi Morton
<p><b>Pathways, Program Approval, Industry Partnerships, Postsecondary Collaboration</b></p> <ul style="list-style-type: none"> <li>• CTE District Program Approval</li> <li>• Onsite Civil Rights Reviews</li> <li>• Pathway Coordinator Leadership</li> <li>• Licensing Leadership</li> <li>• Concurrent Enrollment Leadership</li> <li>• Industry Partnerships</li> <li>• Postsecondary Collaboration</li> </ul>	<p><b>CTE State and Federal Programs, CTE Skills Certification</b></p> <ul style="list-style-type: none"> <li>• State and Federal Funding, Accountability, Monitoring &amp; Technical Assistance</li> <li>• Higher Ed Liaison-Perkins</li> <li>• Section Financial Accounting Federal</li> <li>• CTE Skills Certification Leadership</li> <li>• IT Academy</li> <li>• Summer Conference Oversight and Management</li> </ul>
Education Specialists	Education Specialists
<p><b>Rachel Bolin</b>, Health Sciences Education  <b>Pearl Hart</b>, Family &amp; Consumer Science Education  <b>Doug Livingston</b>, Technology &amp; Engineering Education  <b>Sherry Marchant</b>, College &amp; Career Awareness, Non Traditional, Work-Based Learning  <b>Murray Meszaros</b>, Civil Rights (0.5 FTE)  <b>David Milliken</b>, Skilled &amp; Technical Sciences Education</p>	<p><b>Buddy Deimler</b>, Agricultural Education  <b>Laura deShazo</b>, Business/Marketing Education, IT Academy  <b>Carl Lyman</b>, Information Technology Education, NAG Zone Administrator  <b>Jeff McDonald</b>, Data Steward  <b>Greg Richens</b>, CTE Skills Certification</p>
Other Technical and Support Staff	Other Technical and Support Staff
<p><b>Susan Loamanu</b>, Office Specialist II – Greg, Licensing, GFL  <b>Iris Sanchez</b>, Office Specialist I – Dave, Rachel  <b>Tracy Silcott</b>, Executive Secretary – Brian, Jeff, Laura</p>	<p><b>Maggie Bradshaw</b>, Executive Secretary – Sherry, Carl, Summer Conference &amp; Desk Audits  <b>Andrea Curtin</b>, Executive Secretary – Wendi, Pearl  <b>Brandie Johnson</b>, Office Specialist I – Buddy, Doug, Desk Audits  <b>TC Tomlin</b>, Perkins Program Assistant – Travel, PATI, Perkins Grants</p>

# CTE Summary



- \$97,852,101 in CTE funding (federal & state)
  - All but \$1,847,342 is direct pass thru
  - Includes funds for Computer Technology, Keyboarding, Counseling & Guidance
- \$375,300 in GFL funding
- \$2,102,316 in state funds for non-federal wages/benefits/indirects (before section split)
- \$653,100 ProStart (ongoing + \$250,000 one-time)
- \$341,000 Online Testing (ongoing)
- \$510,000 IT Academy (one-time)

# CTE FUNDING FY16



Utah State Office of Education  
Board Summary Section Report  
For the Section - Career Technical & Adult Education (0662)  
As of: 12/31/2015

Career Technical & Adult Education (0662) Funding Sources	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget	Expenditures to Date	Expenditures as a % of Revised Budget
State Funding (0662 project 40) Administration/Suicide Prevention HB501	\$ 2,280,022	\$ 2,284,966	\$ 2,439,666	\$ 786,475	32.24%
State Funding (0662 project 45) General Financial Literacy	\$ 275,000	\$ 200,000	\$ 200,000	\$ 48,583	24.29%
State Funding (0662 project 46) Suicide Prevention HB329	\$ 226,629	\$ 159,000	\$ 209,000	\$ 968	0.46%
State Funding (0662 project 47) Anti Bullying	\$ 2,725		\$ 175,000	\$ -	0.00%
State Funding (0662 project 48) Non-Trad Registrations			\$ 5,510	\$ 5,510	100.00%
State Funding (0662 project 50) Adult Ed 2% MSP	\$ 592,429	\$ 360,768	\$ 206,068	\$ -	0.00%
State Funding (0662 project 51) Adult Education	\$ -	\$ -	\$ 55,585	\$ 11,271	
State Funding (0662 project 55) Adult Ed Corrections Ed			\$ 79,384	\$ 47,578	59.93%
State Funding (0662 project 60) YIC MSP	\$ 1,237,187	\$ 1,146,725	\$ 1,048,905	\$ -	0.00%
State Funding (0662 project 63) Gang Prevention MSP	\$ 184,376	\$ 190,000	\$ 160,000	\$ 54,896	34.31%
State Funding (0662 project 64) Substance Abuse	\$ 737,651	\$ 430,000	\$ 466,589	\$ 9,771	2.09%
State Funding (0662 project 65) Women in Education (closed in FY2015)	\$ 27,871	\$ -	\$ -	\$ -	-
State Funding (0662 project 66) DHS Receivable Contract	\$ 70,000	\$ 70,000	\$ 75,000	\$ 14,280	19.04%
State Funding Mineral Lease (0662 project 50) Adult Ed	\$ 224,500	\$ 224,500	\$ 224,500	\$ 74,233	33.07%
State Funding Carry Forward (0662 project 40) Suicide Prevention HB501			\$ 76,812	\$ 89,866	117.00%
State Funding Carry Forward (0662 project 46) Suicide Prevention HB329/364			\$ 45,511	\$ 3,500	7.69%
State Funding Carry Forward (0662 project 47) Anti Bullying			\$ 1,726	\$ -	0.00%
State Funding Carry Forward (0662 project 50) Adult Ed 2% MSP			\$ 473,831	\$ 209,658	44.25%
State Funding Carry Forward (0662 project 55) Adult Ed Corrections Ed			\$ 10,855	\$ -	0.00%
State Funding Carry Forward (0662 project 60) YIC MSP			\$ 361,799	\$ 1,252	0.35%
State Funding Carry Forward (0662 project 64) Gang Prevention MSP			\$ 370,288	\$ 258,692	69.86%
State Funding Carry Forward (0662 project 66) DHS Contract			\$ 26,298	\$ 14,870	56.55%
Federal (0662 project 38) RPOS Grant (closed FY2015)	\$ 270,187	\$ -	\$ -	\$ -	-
Federal (0662 project 41, 42,43, 44,48, 49) Carl Perkins	\$ 18,331,518	\$ 22,363,827	\$ 12,473,193	\$ 380,026	3.05%
Federal (0662 project 51, 52, 53, 54, 55) Adult Ed	\$ 4,268,450	\$ 5,260,120	\$ 3,190,358	\$ 328,076	10.28%
Federal (0662 project 80, 81, 82) Neglected and Deliquent (Title I)	\$ 2,220,517	\$ 2,402,439	\$ -	\$ -	-
Carry Forward Federal (0662 project 41, 42, 43, 44, 48, 49) Carl Perkins			\$ 6,854,713	\$ 6,403,605	93.42%
Carry Forward Federal (0662 project 51, 52, 53, 54, 55) Adult Ed			\$ 1,126,285	\$ 858,017	76.18%
	<b>\$ 30,949,064</b>	<b>\$ 35,092,344</b>	<b>\$ 30,356,872</b>	<b>\$ 9,601,127</b>	<b>31.63%</b>

	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget	Expenditures to Date	Expenditures as a % of Revised Budget
					-

Career Technical & Adult Education (0662) Areas of Expenditures by Budget Categories	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget	Expenditures to Date	Expenditures as a % of Revised Budget
Salaries & Benefits	\$ 3,804,781	\$ 4,229,075	\$ 4,957,163	\$ 1,651,084	33.31%
Travel	\$ 116,993	\$ 101,370	\$ 119,069	\$ 55,008	46.20%
Purchased Services	\$ 370,898	\$ 246,942	\$ 217,267	\$ 67,780	31.20%
Equipment	\$ 70,254	\$ 42,300	\$ 44,885	\$ 9,106	20.29%
Supplies and Materials	\$ 476,490	\$ 1,906,380	\$ 1,182,671	\$ 155,387	13.14%
Unallocated Expenses			\$ 34	\$ 34	100.50%
Capital Expenditures					-
Indirect Cost	\$ 437,835	\$ 620,351	\$ 631,821	\$ -	0.00%
Grants and Transfers to Other Agencies	\$ 5,559,442	\$ 8,743,232	\$ 8,339,008	\$ 2,863,766	34.34%
Flow Through Funds to LEAs	\$ 9,596,459	\$ 19,202,694	\$ 14,864,954	\$ 4,798,962	32.28%
<b>Total</b>	<b>\$ 20,433,153</b>	<b>\$ 35,092,344</b>	<b>\$ 30,356,872</b>	<b>\$ 9,601,127</b>	<b>31.63%</b>

# School Children's Trust Section

<u>Line Item</u>	<u>SFY 17 REQUEST</u>	<u>State</u>	<u>Federal</u>
Salaries	\$ -	\$ 296,579.52	\$ -
Benefits	\$ -	\$ 165,525.55	
Purchased Services	\$ -	\$ 90,000.00	
Out of State Travel	\$ -	\$ 9,000.00	
In State Travel	\$ -	\$ 7,500.00	
Supplies and Materials	\$ -	\$ 26,900.00	
Unallocated Expenses	\$ -		
Equipment	\$ -	\$ 5,600.00	
Capital Expenditures	<u>\$ -</u>	\$ -	
Indirect Costs		\$ 83,179.00	
<b>Total:</b>	\$ -	\$ 684,284.07	

# School Children's Trust Mission Summary

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The School Children's Trust Section has three overarching responsibilities:

- 1) Act as the beneficiary representative on behalf of the Utah State Board of Education as it pertains to independent oversight of the school trust lands and school trust funds.
- 2) Manage the School LAND Trust Program.
- 3) Provide education and information to the general public, public school teachers and administrators, legislators, industry, and the media

The section provides beneficiary oversight and review of school trust lands management by the School and Institutional Trust Lands Administration (SITLA) on behalf of the State Board of Education (the primary beneficiary representative for the School Children's Trust granted at statehood by Congress). This involves participating in monthly board meetings, subcommittee meetings of the board, semi-annual board tours of developments on trust lands, meeting regularly with SITLA director and staff regarding potential decisions about trust assets (sales, exchanges, leases, planning and development of trust mineral and surface parcels), monthly reports to the SITLA board on research conducted by this office, etc. This often involves interaction with friendly and adversarial entities and individuals, including legislators and the media, to advocate for the protection and development of trust assets. Much of this takes place in our USOE office, the SITLA office, and other state office buildings such as the capitol complex and the Department of Natural Resources. Some of this work involves travel across the state to see projects taking place on trust lands, and to meet with policymakers, groups, and individuals whether friendly to trust land development or otherwise.

Beneficiary review and input into the investment of the permanent State School Fund by the new School and Institutional Trusts Funds Office and board on behalf of the State Board of Education (the primary beneficiary representative). This involves understanding the potential investments, asset allocations, investment policy, distribution policy, etc. under consideration and approval by the board as well as watching the actual implementation and results. In the past couple of years the main focus on the fund coming from this office has been moving the fund investment from the State Treasurer as the sole investor to a board with an independent office and Chief Investment Officer. Currently the office is working towards changing language in the Utah Enabling Act, Utah Constitution and state code to facilitate a more prudent investment policy. Most of this work takes place in Salt Lake Government Offices, however, recently two members of the section traveled to Washington D.C. to work on a bill to change the Utah Enabling Act.

# School Children's Trust Mission Summary

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The School Children's Trust administers the School LAND Trust Program at the state level in every public traditional and charter school, including about 9,000 School Community Council members, Charter Boards and Charter Trust Land Councils. The school reports required in code and state board rule are submitted through the School LAND Trust website, where data is collected for state reporting and local school boards approve the plans developed by the councils. Reports are submitted primarily in the fall before October 20<sup>th</sup> and in the spring before a date individually determined by each district. The section provides support to schools and districts in the submission and approval process. The section prepares the paperwork for distribution of the annual School LAND Trust distribution to districts and charter schools as determined in the law and state board rule. Most of the administration of the program happens in our USOE office. The section develops training materials and provides training on statewide and district levels about best practices and new assignments made by the legislature for effective School Community Council governance. The section provides 5-6 'statewide trainings' each fall at locations scattered across the state that all council members in the state are invited to attend. In addition, the section provides district trainings, as requested, for principals and council members annually, as well as trainings for education groups such as Utah PTA, UEA and Utah School Boards Association. These trainings do require in state travel.

The section provide accurate information on and advocates effectively for the School Trust with state and national policy makers, the media, the general public, the educational community, user organizations that provide the revenue from the lands, and others. The awareness of School Trust Lands has grown over the past 20 years in Utah but there are still many citizens who are largely unaware of the trust mandate and mission. That lack of understanding often creates unrest with the activities of the trust managers when they don't understand there is a trust mandate. Land and water issues are as controversial as anything can be. When adjacent landowners or land users understand the trust mission and mandate, though there may not be agreement, there is a basic understanding to begin resolving the issues at hand. The section works with education groups to help their members understand activities of the trust through regular Trust Advisory Committee Meetings, education group publications, trainings and ongoing conversation. Every year there are issues that policy makers have to decide that relate to the trust lands, funds and School LAND Trust Program. The section works with policy makers (county, state, and national) to move the mission of the trust forward and to mitigate controversial issues towards a mutually acceptable resolution. The section works with SITLA through the media to provide information to the general public to continually raise broad public awareness of the trust mission and mandate. Much of this work happens within Salt Lake City proper but some of the work requires state travel, regular participation with the legislature and some national travel. Twice a year the section attends the Western States Land Commissioners Conference that is held in a western state, where trust land managers from states that still retain school trusts to learn of emerging issues, discuss solutions to problems and conflicts and to share successes.

# School Children's Trust Mission Summary

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The section is required in state code and state board rule to manage the School LAND Trust Program including distributing the annual interest and dividends from the permanent State School Fund. The section is also required to provide training to school community councils about assignments delegated to them by the legislature and state school board and then conduct compliance reviews of the program and adherence to school community council requirements.

R277-477 Distribution of Funds from the Interest and Dividend Account and Administration of the School LAND Trust Program

R277-491 School Community Councils

53A-1a-108 School community councils – Duties – Composition – Election procedures and selection of members

53A-1a-108.1 School community councils – Open and public meeting requirements

53A-1a - 108.5 School improvement plan

53A-16-101.5 School LAND Trust Program – Purpose – Distribution of funds – School plans for use of funds

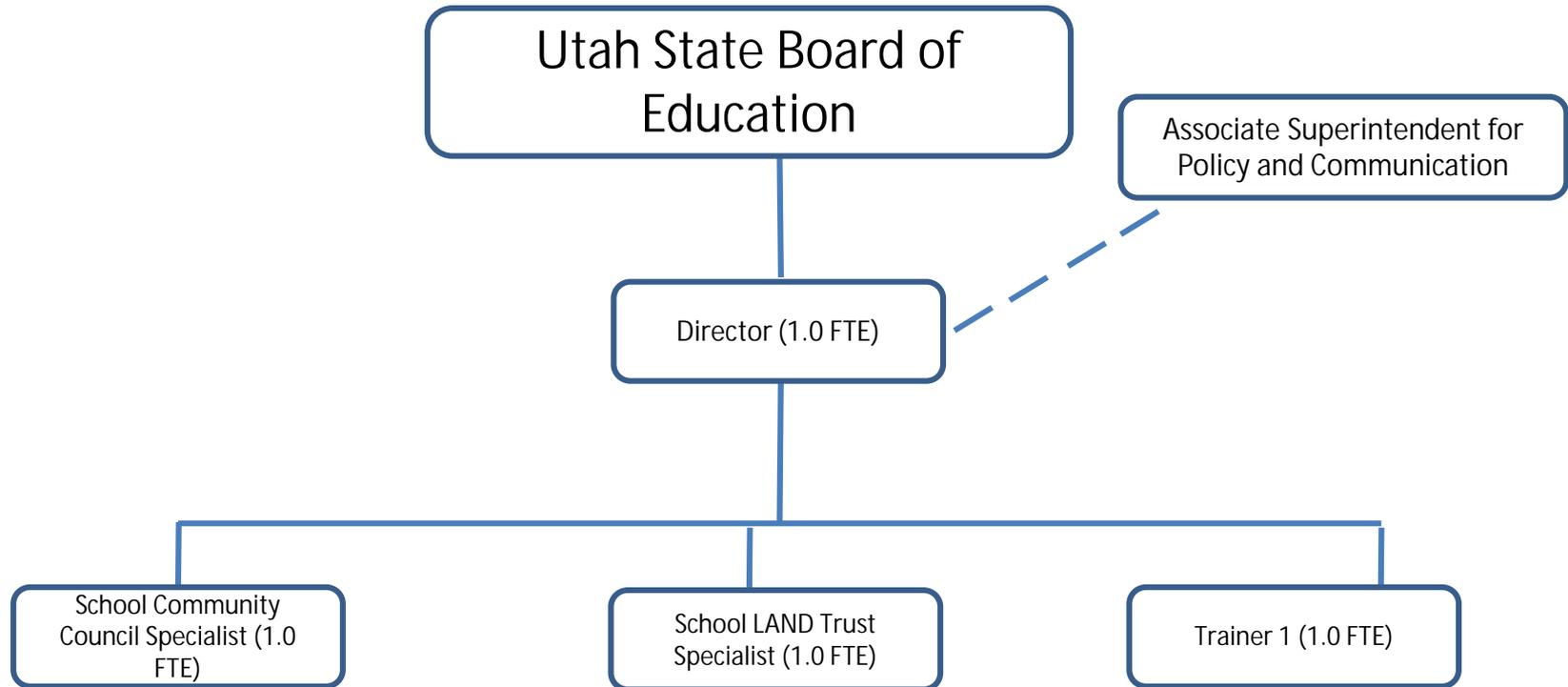
53A-16-101.6 Creation of School Children's Trust Section – Duties

53A-16-101 Uniform School Fund – Contents - Interest and Dividends Account – Invest

More for Education Account

# School Children's Trust Section Org Chart

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# School Children's Trust Salaries and Benefit Line Item

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Total Funding Requested \$462,105

<b><u>4.0</u></b>	<b>Full Time Employees</b>
1.0	School Children's Trust Director
1.0	School Community Council Specialist
1.0	School LAND Trust Program Specialist
1.0	Trainer I

School Children's Trust Director is responsible for assisting State Board in oversight of SITLA and SITFO School Community Council Specialist administers the program website and provides training materials, drafts federal and state legislation, rules, and comments under board, Assistant Superintendent, and Director. Trainers provide training, customer service to districts and schools, conduct compliance reviews.

No positions are federally funded.

All positions are state funded under a separate line item from the interest and dividends account, based on a funding request made by the State Board of Education. See Utah Code 53A-16-101.5 (3) and 101.6(5)

# School Children's Trust Section Purchased Services

## Line Item

Total funding requested from Slide 3: \$90,000

~ \$84,000 Utah Interactive – Create a new website for the School LAND Trust Program. Create new forms each year for schools to complete and provide overall support to keep the website functioning. The contract is for 5 years with a renewable option and we are currently in the 2<sup>nd</sup> year. In year 3, the contract amount is rising to \$80,000 per year

~ \$2,700 Human Resource Services- charged by USOE in addition to indirect costs

~ \$1,500 Required Technical References: LexisNexis – Provides access to on-line legal research for our section

We have a contract through 4/30/2016; however, LexisNexis contract with State of Utah is up 12/31/2015 and will need to be renewed by the state. (5/1/2015 – 4/30/2016 \$119.35/month)

~\$1,000.00 Rent as required by the USOE, we will be paying rent and maintenance for our building space as charged.

~ \$500 Payroll Services- charged by USOE in addition to indirect costs

~ \$300 Postage and Mailing

# School Children's Trust Section Out of State Travel Line Item

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Total funding requested from Slide 3: \$9,000

#1: Western States Land Commissioner's Assoc./Children's Land Alliance Supporting Schools ~\$5,000

Location: Idaho, Oklahoma (Pending)

Dates: Mid July, 2016 4 Days and January 2017 4 Days

Personnel: 1-2

Reason: Collaboration on federal land issues, such as sage grouse listings and monument designations

Train: Yes, we will train other individuals in my section

Required: No

#2: Investment conference(s) for professional development, to be determined/as needed ~\$2,000

Institutional Investors and/or Fund Sponsor conferences with investment consultant

In the past, these have often not had a cost as organizers have covered our costs to attend and present

Event #3: Washington DC Lobbying Efforts, as needed ~\$2,000

State Board sponsored Enabling Act change, if nec.

Land Exchange, Monument Designation efforts

# School Children's Trust In State Travel Line Item

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Total funding requested from Slide 3: \$7,500.00

Event #1: Statewide Training (the example of what we did in FY16 is below, the State Board approves a training plan under Utah Code)

Wednesday, October 21 – 6:00-8:00 – Logan School District (location not confirmed)

Tuesday, October 27 – 6:00-8:00 pm - Highland High School – Salt Lake District

Wednesday, October 28 – 6:00-8:00 pm – St. George (location not yet confirmed)

Wednesday, November 4 – 6:00-8:00 pm - North Davis Junior High – Davis District

Thursday, November 5 – 6:00-8:00 pm - Jordan District Training Center

Thursday, November 12 – 6:00-8:00 pm - Centennial Middle School - Provo

Personnel: 3 or 4 depending on the location and local support

Reason: Part of annual training plan required by the State Board of Education in R277-477-8

Train: District, state personnel and other specialists provide training to council members. This training is sometimes (as determined by the districts) passed on to school councils.

Required: Yes – as approved by the State Board of Education, required in state code

Event #2: District Visits

Dates: Throughout the Year

Location: School Districts that request training (currently scheduled for fall 2015 is South Summit, Weber, Provo and North Sanpete)

Personnel: 1 – sometimes 2

Reason: Ensure legislative required annual training of school community council members

Train: Training of school community council members

Required: Yes Who Requires this Training: State, Board, USOE when a district requests it

Event #3: SITLA Board Tours and Advocacy Meetings

Dates: Throughout the year, as scheduled by the board and as needed. In this category would be a State Board of Education Tour of St. George trust development properties in spring of 2015, requested by the board.

Location: In state locations identified by SITLA staff and board, but could involve trips to Washington DC as described to enact legislation described in Event #3

Personnel: 2 or 3

Reason: To be advised on trust activity and to advocate for protection of trust assets.

Required: No

# School Children's Trust Supplies and Materials Line Item

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Total funding requested from Slide 3: \$26,900

We will be training School Community Councils and district contacts across the state which will require additional supplies and materials

School Community Council members will also have access to training materials through the School LAND Trust Program website, SITLA, SITFO, and materials generated by individual schools and districts.

- ~ \$8,000 Maintenance as charged by the USOE for the building
- ~ \$3,600 Wireless Phone/Data Service – Provide cell phone service for School Children's Trust Section. \$75/mo for 4 employees.
- ~ \$2,500 Membership Dues- maintain state bar active status for 2 section attorneys, CFA Registration exam costs charged here as well, CLASS/WSCLA conference registration also may be charged here
- ~ \$2,500 Conventions, Seminars, Workshops- costs associated with hosting trainings, fees to participate in energy conferences, workshops, some of the professional development costs are charged here
- ~ \$2,000 Insurance & Bonds charged by USOE in addition to indirect costs
- ~ \$2,000 Professional Development and Training- Continuing Legal Education and CFA Costs
- ~ \$3,000 Automated Business Products – Ricoh Color Copier and Printer - Maintenance Agreement for copies with yearly renewal and per copy charge of \$0.05-\$0.07
- ~ \$300 Office Supplies
- ~ \$300 Printing & Binding
- ~ \$300 Photocopy
- ~ \$300 Exhibits, Displays, Awards
- ~ \$100 Books and Subscriptions

# School Children's Trust Unallocated Expenses Line Item

None

# School Children's Trust Section Equipment Line Item

Total funding requested from Slide 3: \$5,500.00

- ~ \$250 Office Furnishings Under \$5,000- as needed
- ~ \$250 Other Small Equip/Supplies- as needed
- ~ \$5,000 Computers, Monitors, and Related Accessories as needed. As this is 6-18 months out, budget to replace computers or monitors, cords, etc. as needed

# School Children's Trust Capital Expenditures Line Item

Total funding requested from Slide 3: \$0

# SFY 16 Carry Forward Estimates

<u>Carry Forward</u>	<u>From SFY 16</u>			
State	\$ -			
Federal	\$ -			
Other	\$ -			
<b>Total:</b>	\$ -			
Under state statute, our budget can't carry forward				
Unused amounts go back into the interest and dividends account				
See Utah Code 53A-16-101.5(3)(c)(ii)				

# Other Information

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- The School Children's Trust Section is funded separately from the bulk of the USOE. We receive a separate line item appropriation, pursuant to a request made by the Utah State Board of Education. See Utah Code Ann. 53A-16-101.5(3), 53A-16-101.6(5). The funds for the School Children's Trust Section comes from the Interest and Dividends Account, which itself is funded by investment returns earned off of the permanent State School Fund. In this way our office is funded solely out of the revenues from the School Children's Trust and not from any taxpayer funds.
- Funding for the School LAND Trust Program, which is the money spent by School Community Councils, is also appropriated in a unique way. Each year, the Legislature appropriates in the Minimum School program an amount fund the School LAND Trust Program. This amount is an estimate, typically equal to the prior year's distribution. The actual distribution is based on the amount of interest and dividends earned over the course of the prior fiscal year (e.g., returns in FY2015 provide funding for the 2016-17 school year), minus certain expenses.

Utah State Office of Education  
Board Summary Section Report  
For the Section - Trust Lands (0884)  
As of: 12/31/2015

Trust Lands (0884) Funding Sources	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget	Expenditures to Date	Expenditures as a % of Revised Budget
State Funding (0884 project 01)	\$ 617,300	\$ 637,700	\$ 637,700	\$ 280,466	43.98%
Carry Forward Discretionary Fund Board Approved (project 01)		\$ 21,783	\$ 21,783	\$ -	0.00%
State Funding (0884 T045) Grand Staircase			\$ 59,455		0.00%
State Funding (0884 project 02)	\$ 74,530				-
<b>Total</b>	<b>\$ 691,830</b>	<b>\$ 659,483</b>	<b>\$ 718,938</b>	<b>\$ 280,466</b>	<b>39.01%</b>

Trust Lands (0884) Areas of Expenditures by Budget Categories	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget	Expenditures to Date	Expenditures as a % of Revised Budget
Salaries & Benefits	\$ 450,185	\$ 484,886	\$ 462,286	\$ 217,493	47.05%
Purchased Services	\$ 65,488	\$ 62,713	\$ 81,121	\$ 26,006	32.06%
Travel	\$ 17,989	\$ 10,000	\$ 10,000	\$ 3,672	36.72%
Supplies and Materials	\$ 16,689	\$ 13,605	\$ 21,771	\$ 8,286	38.06%
Unallocated Expenses					-
Equipment	\$ 5,865	\$ 1,000	\$ 1,094		0.00%
Capital Expenditures					-
Indirect Cost	\$ 60,775	\$ 87,279	\$ 83,211	\$ 25,008	30.05%
Grants and Transfers to Other Agencies					-
Flow Through Funds to LEAs	\$ 74,530		\$ 59,455		0.00%
<b>Total</b>	<b>\$ 691,521</b>	<b>\$ 659,483</b>	<b>\$ 718,938</b>	<b>\$ 280,466</b>	<b>39.01%</b>

Carry Forward - Unused Budget (sweeps to FY 2016 discretionary fund) \$ 309

Utah State Office of Education  
Board Summary Section Report  
For the Section - State Board (0221)  
As of: 12/31/2015

State Board (0221) Funding Sources	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget	Expenditures to Date	Expenditures as a % of Revised Budget
State Funds (22101)	\$ 479,638	\$ 484,000	\$ 484,000	\$ 168,420	34.80%
State Funds (22103)	\$ 92,323	\$ 104,800	\$ 104,800	\$ 44,268	42.24%
Carry Forward Funds (22103)	\$ -	\$ 10,000	\$ 10,000	\$ -	0.00%
UASSP/UAESP	\$ -	\$ -	\$ -	\$ 735	-
<b>Total</b>	<b>\$ 571,961</b>	<b>\$ 588,800</b>	<b>\$ 588,800</b>	<b>\$ 213,423</b>	<b>36.25%</b>

State Board excluding Social Media (0221-01) Areas of Expenditures/Budget Categories	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget Amount	Expenditures to Date	Expenditures as a % of Revised Budget
Salaries & Benefits	\$ 278,093	\$ 484,000	\$ 261,000	\$ 106,751	40.90%
Purchased Services	\$ 12,391	\$ -	\$ 13,500	\$ 2,411	17.86%
Travel	\$ 77,938	\$ -	\$ 77,000	\$ 17,584	22.84%
Supplies and Materials	\$ 72,564	\$ -	\$ 86,000	\$ 41,674	48.46%
Unallocated Expenses	\$ -	\$ -	\$ -	\$ -	-
Equipment	\$ 1,110	\$ -	\$ -	\$ -	-
Capital Expenditures	\$ -	\$ -	\$ -	\$ -	-
Indirect Cost	\$ 37,543	\$ -	\$ 46,500	\$ -	0.00%
Grants and Transfers to Other Agencies	\$ -	\$ -	\$ -	\$ -	-
Flow Through Funds to LEAs	\$ -	\$ -	\$ -	\$ -	-
<b>Total</b>	<b>\$ 479,638</b>	<b>\$ 484,000</b>	<b>\$ 484,000</b>	<b>\$ 168,420</b>	<b>34.80%</b>

Social Media (0221-03) Areas of Expenditures/Budget Categories	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget Amount	Expenditures to Date	Expenditures as a % of Revised Budget
Salaries & Benefits	\$ 78,531	\$ 94,078	\$ 94,078	\$ 42,925	45.63%
Purchased Services	\$ 1,900	\$ 2,234	\$ 2,234	\$ 384	17.17%
Travel	\$ -	\$ 543	\$ 543	\$ 253	46.54%
Supplies and Materials	\$ 1,290	\$ 1,011	\$ 1,011	\$ 707	69.94%
Unallocated Expenses	\$ -	\$ -	\$ -	\$ -	-
Equipment	\$ -	\$ -	\$ -	\$ -	-
Capital Expenditures	\$ -	\$ -	\$ -	\$ -	-
Indirect Cost	\$ 10,602	\$ 16,934	\$ 16,934	\$ -	0.00%
Grants and Transfers to Other Agencies	\$ -	\$ -	\$ -	\$ -	-
Flow Through Funds to LEAs	\$ -	\$ -	\$ -	\$ -	-
<b>Total</b>	<b>\$ 92,323</b>	<b>\$ 114,800</b>	<b>\$ 114,800</b>	<b>\$ 44,268</b>	<b>38.56%</b>

UASSP/UAESP Amounts waiting reimbursement	Actual FY 2015	Board Approved Budget FY 2016	Revised Budget Amount	Expenditures to Date	Expenditures as a % of Revised Budget
Purchased Services	\$ -	\$ -	\$ -	\$ 500	0.00%
Supplies and Materials	\$ -	\$ -	\$ -	\$ 235	0.00%
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 735</b>	<b>0.00%</b>