

2025 School Finance Template Boot Camp What to Bring

All participants will need the following source data and technology resources on the day of the training:

Student Counts

Check the Data Entry tab of your template for a list of the student counts you will need. The source data will be reports from your district's student information system. The name/number of the reports that contain student counts will vary depending on your district's software vendor. Some of the reports you may need include:

- Ascender Software – SAT0900 and SAT2100
- Skyward Software – Superintendent's Report Tables I-IV

Tip: We will be working with district total counts, rather than campus-by-campus counts in this workshop. So, you will want to check that the source data that you bring/download for this workshop are district total counts.

Property Values & CAD Cost Information

All districts:

- Tax Year 2020 Certified Value Report from your County Appraisal District(s)
- Tax Year 2021 Certified Value Report from your County Appraisal District(s)
- Tax Year 2022 Certified Value Report from your County Appraisal District(s)
- Tax Year 2023 Certified Value Report from your County Appraisal District(s) (at a 40K and 100K homestead exemption, if available)
- Tax Year 2024 Certified Value Report from your County Appraisal District(s)

Recapture districts:

CAD Cost for Tax Year 2024 (school year 2024-2025)

Tip: You will want to bring the detailed certified value report for each tax year for each CAD that shows Net Taxable Value, Freeze Adjusted Value, and Frozen Levy. For districts with Chapter 313 agreements the reports will show separate values for M&O and for I&S. In addition, the detailed certified value reports are sometimes packaged as three separate sets of reports including a set of reports for "ARB Approved" values, "Under Review" values, and "Grand Totals". Be sure you have the "Grand Totals" version included in what you bring/download so that you aren't working with partial data.

Tax Rates & Tax Collections

Tax Year 2023	M&O Rate	M&O Collections (actual)	I&S Rate	I&S Collections (actual)
Tax Year 2024	M&O Rate	M&O Collections (estimated)	I&S Rate	I&S Collections (estimated)

Other Data

For districts that either:

- (1) do not offer all grade levels and pay tuition to send students to another district; or
- (2) charge tuition to educate students who reside in another district

Copy of the tuition agreement that your district has with the other district.

Technology

Your most recent template

Laptop

TIP: Having a second screen or device is recommended.