

Madison Metropolitan School District

Budget Update # 2:

An Overview of MMSD's Staff Allocation Process for 2014-15

Board of Education Operations Work Group - February 2014

The allocation formulas and processes which determine school based staffing are proving to be one of the most important aspects of our zero-based budget process. During the past two months, we have documented current practice and created a 'design team' to review and propose ways to modify staff allocation practices. These efforts are helping to build a more unified ownership of the staff allocation process and better alignment between budget processes and instructional priorities.

The staff allocation process, indeed the budget development process as a whole, can be one of those invisible but rigid structures which make it hard for schools to align resources to best impact student learning. Consider the table below, which reports MMSD's actual 2013-14 allocation of teaching staff at the elementary level:

Defined by Class Size Guidelines and Instructional Program:	FTE:
Locally Funded Sections	544.90
SAGE Funded Sections	113.10
Specials (Art, Music, Phy Ed., REACH)	126.15
Additional Staffing Allocated from District Departments	
Special Education	174.18
Title I	54.32
ESL Teachers & Bilingual Teachers	85.00
School Psychologists & Social Workers	44.00
Nurses	13.55
PBS Teachers	6.40
Other Staffing as Specified by District for School Site:	
Librarians	32.00
Instructional Resource Teachers	32.00
Interventionists (Non-Title I)	14.00
Assistant Principals	5.00
Adaptive Phy. Ed. (1.4) and Open Classroom Adjustment (2.0)	1.40
Economic Needs Index Adjustment - Additional Staff	6.80
Subtotal:	1252.80
Unallocated Reserve / Asst., Supt. / August-Sept. Adjustments as Needed	14.25
Grand Total	1267.05

As the table shows, staffing is allocated to schools through approximately fifteen specific categories of program or department. These categories are created (or reinforced) by local MMSD practices, specific budget amendments, state statutes, collective bargaining agreements, as well as state and federal funding structures.

Within each category, the 1,267 teacher FTE's are allocated to the elementary schools based almost entirely upon 'per-student' or 'per-school' formulas. As a result, staffing allocations across the elementary level demonstrate a level of uniformity which is not necessarily in agreement with the varying needs of the schools.

A review of the elementary staff allocation table indicates that only 6.80 FTE (described in the table as Economic Needs Index Adjustment – Additional Staff) can be fairly described as staff assigned at the discretion of an elementary school principal. (See Also: Middle School and High School Allocation tables in the Appendix).

The correct balance between district-wide staffing standards and flexibility at the school level is difficult to define. However, our review of the MMSD process suggests that increasing staffing flexibility may empower schools to tailor their staffing to better meet their particular School Improvement Plan.

Our efforts to improve the staffing allocation process are organized around three distinct goals:

- Greater Flexibility within the Existing Allocation Methodology
- Reorientation from Central Office to Schools
- Reallocation of Existing Resources to Support Neediest Schools

The discussion which follows will describe these goals in more detail. We're excited to share these ideas with the Board. However, it is important to note that at this point of the budget development process (February – Week 1) our work in this area is not yet complete nor have final allocation decisions been made. The staffing allocation process typically begins in the first week of March, and we expect to maintain that schedule.

Goal # 1: Provide Greater Staffing Flexibility within the Existing Allocation Methodology

Let's begin with an example: A middle school "School Based Leadership Team" (SBLT) has established the following focus area in their School Improvement Plan (SIP): *Our school will be a safe and positive learning environment where each student feels personally welcomed and supported.*

Now, the staffing allocation methodology for middle schools (see Appendix 2) shows that formulas determine the quantity of staff allocated to each middle school, including areas directly related to this SIP goal, such as guidance, PBS, social workers, assistant principals, and security personnel, among other relevant areas.

Under Goal # 1, the quantity of staff allocated to this middle school would not change, but would be less prescriptive, allowing the school leadership greater discretion to change the mix of staffing resources to best support the SIP focus area. Being less prescriptive is a reflection of our belief that "schools are the driving force" in the district.

To create this flexibility, staffing allocations in certain areas would be expressed as minimum thresholds rather than fixed FTE, allowing the school leadership to determine the proper mix of staff to support their SIP goal. The flexibility described here is not unconditional. Establishing minimum FTE thresholds, promoting the relationship

between flexibility and SIP goals, and providing a final staffing review by the Assistant Superintendent are important aspects of the process.

This is a multi-year process best described by borrowing a descriptor from our district's instructional focus – a gradual release of responsibility. We intend to make initial efforts towards Goal # 1 with the 2014-15 allocation process which begins next month. A staffing guidance document will be provided to help school leaders become familiar with the opportunities and limitations associated with these changes in the staffing allocation process.

Goal # 2 Reorientation from Central Office to Schools

While Goal # 1 above is concerned with providing greater flexibility within FTE allocated to schools, Goal # 2 focuses on those FTE, primarily teachers, who are assigned to the central office rather than to a particular school or schools. Examples would be program support teachers (PST) or teacher leaders (TL) who perform important work on behalf of the schools.

The MMSD Strategic Framework is based upon the belief that “schools are the driving force.” In support of that belief, Goal # 2 requires a review of central office positions for the purpose of reorienting FTE where possible towards the schools. For example, teachers in the Talented and Gifted (TAG) program, or in the Office of Multicultural / Global Education program (OMGE), are commonly assigned to the district office, although their work is often a blend of central office and school based responsibilities. Under Goal # 2, our staffing model will encourage closer affiliations with schools rather than central office.

While this goal does not change the total FTE in a given program, it emphasizes our intent to ‘push out’ to schools both staffing and program funding. As with Goal # 1, this is a multi-year process. We intend to make initial efforts towards Goal # 2 with the 2014-15 allocation process which begins next month.

Major program reviews are in progress for MMSD's Special Education department, high school alternatives, and others. In these instances, we will wait to learn more about the future direction of these programs before recommending changes to the staffing allocation process.

Goal # 3 Reallocation of Existing Resources to Support Selected Schools

The zero-based budget process is intended to scour the entire MMSD budget, department-by-department, looking for opportunities to reallocate resources. This is a painstaking process, but one which we believe will be worth the effort.

Goal # 3 tests our ability to find and fix budget inefficiencies and our willingness to reallocate existing resources from one priority to another. This is primarily an exercise in identifying central office resources for reallocation to school sites, including all central office departments, from Building Services to Accounting/Finance to Curriculum and Assessment and all others.

Under this goal, our review of the entire MMSD budget will result in recommendations for program dollars and/or FTE which could be reallocated into a 'pool.' Using a metric we are developing based on school performance, poverty, complexity and enrollment, the funds will be redistributed to designated schools.

Given that MMSD revenue growth is expected to be approximately 1.5% next year, and funding beyond next year is unknown, Goal # 3 is essential to finding additional funds for our neediest schools and for funding emerging district priorities. If we succeed in reallocating just ½ of 1% of MMSD's \$324 million General Fund expenditures, over \$1.6 million would be redirected. We have begun work on Goal # 3 with the start of the zero-based departmental budget reviews.

We hope this overview of the MMSD staff allocation process has been informative. We look forward to discussing it with you at the February Operations Work Group.

Appendix 1

MMSD High School Allocation Table:

High School Staff Allocations 2013-14	
Defined by Class Size Guidelines and Instructional Program:	FTE:
Locally Funded Regular Ed Programming	312.00
Additional Staffing Allocated from District Departments	
Special Education	115.85
Title I	0.00
ESL Teachers & Bilingual Teachers	30.00
School Psychologists & Social Workers	14.60
Nurses	5.70
PBS Teachers	0.00
Other Staffing as Specified by District for School Site:	
Bilingual Guidance Counselors	4.00
Assistant Principals	16.00
Athletic Directors (2 Non-teacher, 2 teacher)	4.00
Economic Needs Index Adjustment - Additional Staff	0.00
Minority Services	4.00
Engagement Coordinators	4.00
Private/Parochial Coord	0.80
AVID Teachers (1.6) (3.0) and Coordinators (.8)	5.40
Guidance	20.40
Discretionary Allocation	30.20
Subtotal:	566.95
Unallocated Reserve / Asst. Supt.	0.00
Grand Total	566.95
Enrollment:	7,124
Ratio: Students per Teacher:	12.57

Appendix 2

MMSD Middle School Allocation Table:

Middle School Staff Allocations 2013-14	
Defined by Class Size Guidelines and Instructional Program:	FTE:
Locally Funded Regular Ed Programming	290.20
Additional Staffing Allocated from District Departments	
Special Education	84.50
Title I	0.00
ESL Teachers & Bilingual Teachers	26.00
School Psychologists & Social Workers	17.90
Nurses	5.80
PBS Teachers	7.80
Other Staffing as Specified by District for School Site:	
AVID Teachers (3.7) and Coordinators (3.4)	7.10
Guidance (.50 per School)	5.50
Assistant Principals	5.00
Small School Adjustment (2.0)	2.50
Economic Needs Index Adjustment - Additional Staff	11.80
Discretionary Allocation	30.10
Subtotal:	494.20
Unallocated Reserve / Asst. Supt.	0.00
Grand Total	494.20
Enrollment:	5344
Ratio: Students per Teacher:	10.81

Appendix 3

MMSD Elementary School Allocation Table:

Defined by Class Size Guidelines and Instructional Program:	FTE:
Locally Funded Sections	544.90
SAGE Funded Sections	113.10
Specials (Art, Music, Phy Ed., REACH)	126.15
Additional Staffing Allocated from District Departments	
Special Education	174.18
Title I	54.32
ESL Teachers & Bilingual Teachers	85.00
School Psychologists & Social Workers	44.00
Nurses	13.55
PBS Teachers	6.40
Other Staffing as Specified by District for School Site:	
Librarians	32.00
Instructional Resource Teachers	32.00
Interventionists (Non-Title I)	14.00
Assistant Principals	5.00
Adaptive Phy. Ed. (1.4) and Open Classroom Adjustment (2.0)	1.40
Economic Needs Index Adjustment - Additional Staff	6.80
Subtotal:	1252.80
Unallocated Reserve / Asst., Supt. / August-Sept. Adjustments as Needed	14.25
Grand Total	1267.05
Enrollment:	12,371
Ratio: Students per Teacher:	9.76