

# **2017-18**

# **Budget Development**

## **Operations Work Group**

January 23, 2017

# High Level Budget Development Calendar

**2017-18 High Level Budget Development Calendar by Month and Role/Responsibility - Last Update 01/18/2017**

	October	November	December	January	February	March	April	May	June	
Board	Board action on final adjustments to the 2016-17 budget. 2017-18 budget preview; discuss budget goals, guiding principles; seeking early input into strategic priority actions; present budget calendar and rationale for starting budget work earlier.	Referendum on revenue limits on November 8. At OWG, confirm goals & guiding principles. <b>Lead with strategic priority actions.</b> Update major planning assumptions for 2017-18. Begin public input after November referendum.	Based on November input, present Budget v2.0 for board consideration. OWG presentation will <b>lead with employee benefits and total compensation.</b> Board will provide direction for creating budget v3, focusing mainly on benefits/compensation plans. Report on public input.	Based on December input, we will finalize Strategic Priority Actions.  <b>Preliminary discussion of staffing plan.</b>	Based on January input, we will present budget v4 for board discussion. <b>Lead with overview of all major budget components, then focus on staffing plan. Goal is to begin the staffing process on Feb.16</b> Possible update on state budget plans. Report on public input received thus far.	March Update at OWG; <b>Lead with admin recommendations for final budget balancing</b> ; Provide input into form & content of April budget report; Update on state budget plans. Report on public input received thus far.	Begin <b>Board Review of Proposed Budget</b> ; Confirm Process for BOE budget requests for information and possible amendments; Update on staffing process; Review and Approve Schedule of Opportunities for Public Input; Update on state budget plans.	Second Review of Proposed Budget; 4-week Window for Amendments; Request Add'l Information as Needed; Early approval requests for budget action at May regular meeting. Report on Public Input; Update on state budget plans.	Third Review of Proposed Budget; Report on Public Input Request Add'l Information as Needed; <b>Possible Budget Adoption at June Regular Meeting.</b>	
SLT	Preview budget calendar; review master list of budget issues and opportunities; recommend budget goals, guiding principles and begin to narrow focus on strategic priority actions.	Further develop Priority Actions for Board review at OWG. Preview how priority actions fit into total budget plan for 2017-18. Lead departmental reviews for 17-18 departmental budget recommendations.	Focus on staffing plan; based on enrollment projection, how many FTE are required? Based on all other budget assumptions, how many FTE can be funded? Confirm the guidance and standards which drive the staffing workbook. <b>Run v3 by end of month.</b>	SLT overview of all major budget components, then focus on staffing plan. Preview the new e-workbook design. Goal is to begin the staffing process on Feb.16	Final review of School Staffing Workbook Strategy prior to 2/16 schools / Review of School Form Begin Build Departmental Balance Sheet Purpose	January  Based on December input, we will finalize Strategic Priority Actions.  Preliminary discussion of staffing plan.		Confirm Final Budget Discussions / Review Draft of Budget Report / Assist in Communications with Schools & Departments	Monitor Board Budget Discussions Assist in Communications with Schools & Departments / Help Prepare Responses to BOE Requests as Needed	Monitor Budget Discussions / Assist in Communications with Schools & Departments / Help Prepare Responses to BOE Requests as Needed
Budget Team	Complete fall adjustments to current year budget. Draft budget calendar for 2017-18. Create first phase of Promissory Note plan. Create <b>v1 draft budget</b> for internal use by 10/31/16.	Review budget v1; Develop recommendation on total amount of strategic priority actions; focus on benefits and compensation plans. <b>Run v2 by end of month.</b>	Focus on staffing plan; based on enrollment projection, how many FTE are required? Based on all other budget assumptions, how many FTE can be funded? Review mechanics of staffing process and updated staffing workbook. <b>Run v3 by end of month.</b>	Review all District-wide Departments for 2017-18 Budget / Integrate staffing process with T&L Dept. and HR / Review 2nd Friday Count. <b>Run v4 by end of month.</b>	Monitor to B Plan is Created on Target/ A Formula Budget Department Update Budget Create balance sheet <b>Run v5 by end of month</b>			Complete full draft of budget for Board / Submit for OWG / Create Presentation for OWG and Regular Meeting / Coordinate Printing & Website with Comm Dept.	Respond to Board / Public Requests for Add'l Information / Public Input Sessions on Budget / Follow Up Presentations as Needed	Respond to Board / Public Requests for Add'l Information / Public Input Sessions on Budget / Follow Up Presentations as Needed
Human Resources Team	Work with business office to confirm accuracy of total staff and each staff assignment for current year. Focus on benefits and compensation planning for 2017-18. Communicate with employee representatives about options.	Develop options and recommendations for 2017-18 benefit and total compensation options to be presented to the board next month. Communicate with employee representatives about options	Co-present to board on benefits and total compensation options, with recommendations.	Co-chair detailed staffing plan development with T&L and Budget Team; confirm budget plans for Salary, Wages, & Benefits / Define Wellness Plan and Budget for 2017-18	Review School Workbooks by Support Staff / Postings for key vacancies / Advise on Admin and Teacher Retirements	Processes for Placement for 17-18 / Early Postings for key Vacancies	Staffing Plan Included in all Budget Proposal to Board / Focus on Hiring Process / Finish Surplus and Placement Process	Postings, Interviews & Hiring	Postings, Interviews & Hiring	
Communications Team / RAD	Focus on communications plan for November referendum.	Focus on communications plan for November referendum. Develop plan for public input into the budget development process.	Prepare summary of public input each month. Review and edit all budget related information on the MMSD website.	Post Budget Updates to website as Needed / Assist with Budget Communications / Track Incoming Questions & Replies / Summarize web-based input for Board Report	Post Budget Updates to website as Needed / Assist with Budget Communications / Track Incoming Questions & Replies / Summarize web-based input for Board Report	Post Budget Updates as Needed / Assist with Budget Communications / Track Incoming Questions & Replies / Summarize web-based input for Board report	Assist in Preparation of Final Budget Report (Graphics, Layout) and Presentation / Schedule Public Input Sessions / Summarize web-based input	Monitor Budget Discussions Respond to Requests for Info Schedule & Facilitate Public Input Sessions	Monitor Budget Discussions Respond to Requests for Info Schedule & Facilitate Public Input Sessions	

# Budget Goals

**Close alignment to the strategic framework goals:** Consistent with our vision to make every school a thriving school that prepares every student to graduate ready for college, career and community, these budget resources support the district's goals and priorities as defined in our Strategic Framework

**Demonstrate equitable use of resources to support schools with highest needs:** More in-depth reporting on how and where resources are allocated will improve awareness and help inform the process to more equitably distribute resources towards schools with the greatest need

**Improve transparency in budget development** by focusing on the staffing process and more detailed cost per pupil reporting: Presenting the budget document in a more accessible and reader-friendly format will improve accountability and better demonstrate how resources are used to support instruction

**Begin budget development earlier** to allow more time for strategic, pre-decisional input by Board and community

# Guiding Principles

- Allocate resources for greatest impact on students, raising achievement and narrowing gaps
- Leverage priority actions to accelerate gap narrowing progress
- Maintain a multi-year perspective to propel momentum and effective support to schools
- Support opportunities to innovate for organizational learning

# Budget Development Cycle

The budget development process follows a sequence which:

- Begins by establishing budget goals and guiding principles
- Creates a revenue forecast based on current law and projected enrollment
- Funds strategic priority actions
- Develops a positive compensation strategy, including salaries/wages and benefits
- Provides for expected increases, such as utilities and transportation costs
- Identifies budget balancing reductions at the central office level to reduce impact on schools
- Creates a district wide staffing plan



# 2017-18 Revenue Factors

## Current Context

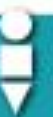
- \$10MM Additional Revenue Authority from the November 2016 Referendum
- TID # 25 Promissory Note provides approximately \$2 MM per Year (\$9.27MM total)
- 2017-19 state budget impact on K-12 is unknown:
  - Estimated Categorical Aid Increase of \$75/pupil
  - Enrollment estimate (early) is +75 FTE....
  - Enrollment 3-Year Rolling Average is flat
  - Will there be an Increase in Revenue Limit per Pupil?

# Financial Targets for Priority Actions

- Foundational/Incremental Actions: \$3.5M
  - Building Based Staffing: 7.530 FTE
  - District Based Staffing: 7.330 FTE
- Accelerated Actions: \$0.5MM
  - Building Based Staffing: 0.400 FTE
- Total \$4.0MM

# 2017-18 Foundational Priority Actions

<b>School Improvement Planning</b>				
Reading Intervention for all Elementary Schools (move from Title I to local)			190,000	
PD for K-8 Intensive Schools			125,000	
<b>Common Professional Learning</b>				
Race and Equity PD			200,000	
PD for Leadership Coaching			50,000	
1.0 FTE for Additional mentor for new teachers		1.000	100,000	
Forward Madison Sustainability - Maintain support for new Teachers and Principals				200,000





# 2017-18 Foundational Priority Actions

<b>Priority Area 1 - COHERENT INSTRUCTION</b>
<b>4K and Early Literacy</b>
Director of Early Learning – to coordinate approach to 4K at both school and community sites
<b>ELL Plan</b>
Transportation Costs for Bilingual Programing Access
2 FTE - ESL/DLI K-12 Teacher Leaders for increased school support
ESL Redesign PD
<b>Focus on Coherent Instruction at the Secondary Level</b>
MS Report Card Redesign and IC Customization
AVID Expansion (LaFollette and East - Building Based FTE)
Equal Opportunity Schools – for AP Access and Expansion and in response to OCR
<b>Special Education Plan</b>
2.0 PST (Building Based FTE) – to ensure each school has at least 0.5 PST
Attendance at IEPs for SEAs as needed
<b>Student Services</b>
PD for Restorative Approach Strategies
UMOJA - Expand restorative practices pilot from 9 to 19 schools, with a focus on in school suspension
Nursing staff for start-of school preparation
Behavior Health in Schools - Sustain funding
Welcoming Schools Program expansion



# 2017-18 Foundational Priority Actions

Priority Area #2 Personalized Pathways				
5 FTE for HS and MS to primarily focus on ACP, Experiential Learning and Pathways Expansion	5.000		430,000	
PD for Project based learning, integration, differentiated instruction, scheduling, second pathway development, experiential learning, ACP School Based Planning, communication			220,000	
Needs for experiential learning (student transportation and subs for teachers)			75,000	
Experiential Learning contract with Chamber of Commerce			20,000	
Bring Lead Counselor to 1.0	-	0.330	30,000	
Priority Area #3 Family, Youth and Community Engagement				
0.5 Data Coordinator for MOST	-	0.500	50,000	
Volunteer Management System			6,000	
Mentor Coordination Hours			5,000	
FYCE action Teams to support access and participation of families			43,500	
MSCR (All potentially Fund 80)				
3 CLC Grants				150,000
0.5 MSCR Clerical Increase	-	0.500		25,000
Printing costs for MSCR program catalog				24,000
Late bus switch from Metro to Badger			47,000	

# 2017-18 Foundational Priority Actions

<b>Priority Area #4 Thriving Workforce</b>
Human Resources Information System - Lease
TEEM Scholars
Expand Grow Your Own to include dual certification
<b>Priority Area #5 Accountability and School Support Systems</b>
Safety/Prevention Coordinator
Incremental progress towards annual maintenance funding goal (coordination with TID 25)
Asset Management System - Lease
Athletics staff Professional Development
Athletic Equipment/Officials/Transportation
<b>Information and Tech Plan</b>
Group 3 implementation and G4 pre implementation
Learning Management System Lease



# Financial Targets for Priority Actions

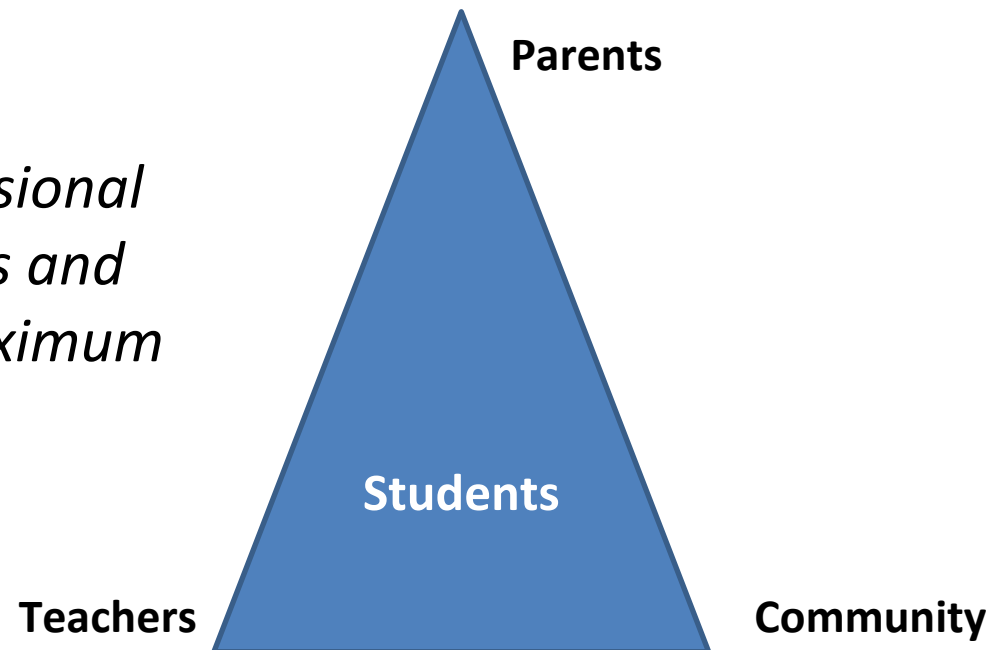
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- **Total** **\$4.0MM**

# Strategic Priority Actions

## Accelerated Areas of Focus

- All 9<sup>th</sup> graders will be on-track to graduate college, career and community ready
- All 3<sup>rd</sup> graders will be proficient readers

*Strategically aligns professional learning, human resources and family/community for maximum engagement and impact*



# Accelerated Priority Action

## Focus on 9th Grade Students

### All 9<sup>th</sup> Graders - Universal

Teachers - Time for 9OT Teams to collaborate monthly with content area teachers

Teachers - Deepen use of Culturally and Linguistically Responsive Teaching Practices

Teachers - Increase Summer School pay for 9<sup>th</sup> grade core courses (highest failed courses)

### All Pathways 9<sup>th</sup> Graders and All East High School 9<sup>th</sup> Graders

Teachers - Time for teachers to implement targeted Unit Recovery for all 9<sup>th</sup> grade core courses in the first Pathway

Teachers - Extended Employment for 9<sup>th</sup> grade teachers for planning and PD

Parents/Teachers - Student Led Conferencing – 25 minutes

### East High School Freshman Academy - Targeted

Teachers - Increase 9OT Coach allocation to increase data use and problem solving

Teachers - All 9<sup>th</sup> grade teachers – 90 min. of CPT a week (up from 45 min)

Community - Coordinate and align mentoring and tutoring for 9<sup>th</sup> graders

**Total Cost – Approximately \$250K**

# Accelerated Priority Action

## Proficient by 3rd Grade

### All Elementary Schools

Teachers – PD - Building-Based Literacy Learning Labs

Teachers - Reading Intervention Software (Lexia) – targeted student use K-2 in non-intensive schools

Parents/Community - Parent University to support engagement around foundational early literacy skills

### Intensive Support Elementary Schools - Targeted

Teachers - PD with National Equity Project on CLRP

Parents/Teachers - Academic Success Nights or MPTT approach related to foundational early literacy

**Total Cost – Approximately \$250K**

# Innovative Priority Actions

Innovative Priority Actions
Long Range Planning & Evaluation of 4K and Early Childhood
Multi-year Middle School Design Process
Development/Redesign of Secondary Alternative Schools
Consulting on Budget Design
Additional Reserve for Innovation Opportunities



# Financial Targets for Priority Actions

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- **Total** **\$4.0MM**

# Discussion

What feedback do you have related to  
the **Priority Actions**?

# Staffing Strategy

- Referendum impact helps to prevent reductions, does not necessarily fund additional FTE
- Operating premise in early budget work is to hold school staffing plan at or very near current levels
- Redesign of staffing workbook (web based) and allocation process will create a better and more efficient method for allocating staff (cross-functional work team includes: T&L Team, Chiefs, HR, Budget Team)

# Title I

• Grant Award Estimate	
(same as 15/16 award)	\$6.65 M
• TI School Budgets	\$4.85 M
• Title I Funding Strategy remains the same as 15-16	
• Allocated to TI eligible elementary and middle schools in rank order of poverty, based on tiered approach per pupil	
• Direct Certification criteria	
• Reservations	\$1.80 M
• Administrative Costs	\$212,484
• Private School Services	\$122,647
• Family Engagement	\$95,000
• Homeless	\$321,625
• Migrant	\$48,245
• Centralized Service	
(C&I, OMGE, Avg Salary Differential)	\$555,169
• Indirect	\$300,000

# Student Services

## Special Education

Staffing levels remain consistent with 15-16, any building based changes based on enrollment

	Teacher FTE	Students	SEA Hours	PST Allocation
Elementary Schools	1.000	10.5	30	0.500
Middle Schools	1.000	12.5	28	0.500
High Schools	1.000	15.0	26	1.000

- Allocation accounts for students in referral process (at placement rate)
- Rounding allocation up to allow for increase of students
- Individual adjustments based on students and local context
- Differentiated weighted student factors trigger supplemental SEA hours
- Unallocated in reserve (CC, SEA)

# Student Services

## Behavior Education Plan

- Behavior Education Plan staffing levels remain at the same level as 15-16
- Base PBS is 0.2 for elementary, 0.5 for middle school, and 1.0 for high school
- All allocation is given as certified staff (PBS coach) but can be converted to BEA provided base is maintained

# Supplemental Staffing to Support English Language Learners

## ESL/BRT Allocation

- ESL/BRT allocation in non-bilingual environments: 1:45
- EST/BRT allocation in bilingual environments: 1:70

## BRS Allocation

- Based on a weighted formula

English Language Proficiency Level	Severity Points
1	4.0
2	3.5
3	3.0
4	2.0
5	1.0

\* Parent Indicating need for correspondence in target language of Spanish/Hmong = 0.5

# Staffing Strategy

- Operating premise in early budget work is to hold school staffing plan at or very near current levels
- Referendum impact helps to prevent reductions, does not necessarily fund additional FTE
- Redesign of staffing workbook (web based) and allocation process will create a better and more efficient method for allocating staff (cross-functional work team includes: T&L Team, Chiefs, HR, Budget Team)



# Workbook & Allocation Timeline

Date	Event
January 18	Principal Meeting - Brief Introductory Overview
February 8	Principal Meetings by Level
<b>February 15</b>	<b>Workbooks released</b>
February 16, 17, 20, 21, 23, 24	Phase 1 - Working Labs
February 27, 28, March 1, 2, 3	Phase 2 - Presentation & Workbook approval process with Principals, Chiefs of Schools and T and L Team
March 3	Workbooks Due

# Workbook & Allocation Process Improvements

## **Key strategies for support**

- Each principal will be assigned an HR analyst for the process
- Central office departments available for consultation and support through designated days
- Cross department team to provide consultancy

## **New this Year**

- Budget lab process takes place in two phases

# Budget Lab: Phase 1

**Purpose:** To support principals in the completion of their workbook

**Process:** Principals will partner with their HR analyst to rotate through stations and consult with central office departments to seek clarification or answer questions related to their workbook. **Focus on maximizing allocation, approving conversions, ensuring proper licensing requirements, and staffing compliance**

**Goal:** Support Principals to strategically allocate and maximize resources

# Budget Lab: Phase 2

**Purpose:** To allow the principal an opportunity to **present their workbook decisions** and how these reflect equity and support for all students, particularly student subgroups

**Process:** Principal and central office cross functional team engage in a **collaborative protocol** that allows principals to present their workbook

**Goal:** To **approve all school workbooks** through a presentation where the principal highlights key strategies around staffing, budget and school systems that reflect **equity and shared ownership** for all students

# Discussion

What feedback do you have about the  
**Workbook and Allocation Process?**

# Next Steps

- Finalize e-workbook
- Work with Special Education, OMGE, Student Services, Title I to finalize allocations based on student counts
- Operational Work Group – Feb., 13, 2017
  - Staffing Strategy
  - Compensation Strategy
  - Health Insurance Strategy