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. **Lead with strategic priority actions.** 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 **lead with employee benefits and total compensation.** 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 Prioriy Actions. **Preliminary discussion of staffing plan.**	Based on January input, we will present budget v4 for board discussion. **Lead with overview of all major budget components, then focus on staffing plan. Goal is to begin the staffing process on Feb.16** Possible update on state budget plans. Report on public input received thus far.	March Update at OWG; **Lead with admin recommendations for final budget balancing**; Provide input into form & content of April budget report. Update on state budget plans. Report on public input received thus far.	Begin **Board Review of Proposed Budget;** 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; **Possible Budget Adoption at June Regular Meeting.**
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. **Run v3 by end of month.**	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 / Rev... of School For... Begin Build... Depar... & Programs... Bala... Purp...	Chiefs Review Results of ...	Confirm Final Budget ...ions / Review Draft of ...get Report / Assist in ...unications 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 **v1 draft budget** 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. **Run v2 by end of month.**	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. **Run v3 by end of month.**	Review all District-wide Departments for 2017-18 Budget / Integrate staffing process with T&L Dept. and HR / Review 2nd Friday Count. **Run v4 by end of month.**	Monitor to B... Plan is Create... on Target / A... Formula Bud... Department... Update Budge... Create balan... **Run v5 ... mo...**		...plete full draft of budget ...t for Board / Submit for ...ing / Create Presentation ...r OWG and Regular ...ing / Coordinate Printing ...d 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 Sch... Workbooks b... Support S... Workbook... 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 ...ll Budget Proposal to ...ard / 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

January (inset magnification): Based on December input, we will finalize Strategic Prioriy Actions. Preliminary discussion of staffing plan.

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 an 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

Goals & Guiding Principles

Revenue Forecast

Strategic Priority Actions

Salary & Wage Plan

Employee Benefits Plan

Required Allowances

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 <u>unknown:</u>

  - <u>Estimated</u> 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

School Improvement Planning				
Reading Intervention for all Elementary Schools (move from Title I to local)			190,000	
PD for K-8 Intensive Schools			125,000	
Common Professional Learning				
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

Priority Area 1 - COHERENT INSTRUCTION
4K and Early Literacy
Director of Early Learning – to coordinate approach to 4K at both school and community sites
ELL Plan
Transportation Costs for Bilingual Programing Access
2 FTE - ESL/DLI K-12 Teacher Leaders for increased school support
ESL Redesign PD
Focus on Coherent Instruction at the Secondary Level
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
Special Education Plan
2.0 PST (Building Based FTE) – to ensure each school has at least 0.5 PST
Attendance at IEPs for SEAs as needed
Student Services
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

| Priority Area #4 Thriving Workforce |
| --- |
| Human Resources Information System - Lease |
| TEEM Scholars |
| Expand Grow Your Own to include dual certification |
| **Priority Area #5 Accountability and School Support Systems** |
| 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 |
| **Information and Tech Plan** |
| Group 3 implementation and G4 pre implementation |
| Learning Management System Lease |

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Strategic Priority Actions
Accelerated Areas of Focus

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

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

Parents

Students

Teachers

Community
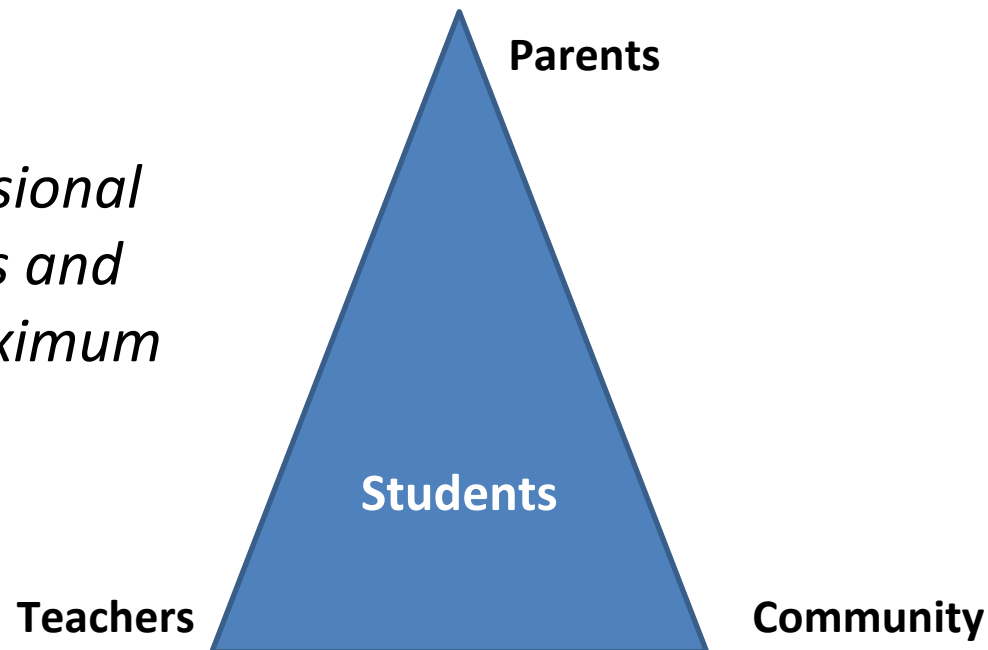
Accelerated Priority Action Focus on 9th Grade Students

All 9th 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 9th grade core courses (highest failed courses)
All Pathways 9th Graders and All East High School 9th Graders
Teachers - Time for teachers to implement targeted Unit Recovery for all 9th grade core courses in the first Pathway
Teachers - Extended Employment for 9th 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 9th grade teachers – 90 min. of CPT a week (up from 45 min)
Community - Coordinate and align mentoring and tutoring for 9th 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

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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

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Workbook & Allocation Timeline

Date	Event
January 18	Principal Meeting - Brief Introductory Overview
February 8	Principal Meetings by Level
February 15	**Workbooks released**
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