

WORK GROUP REPORTS

2014-15 Budget Recommendations

Year-One Final Report for the Strategic Finance Plan
Submitted to the Lake County School Board
June 9, 2014

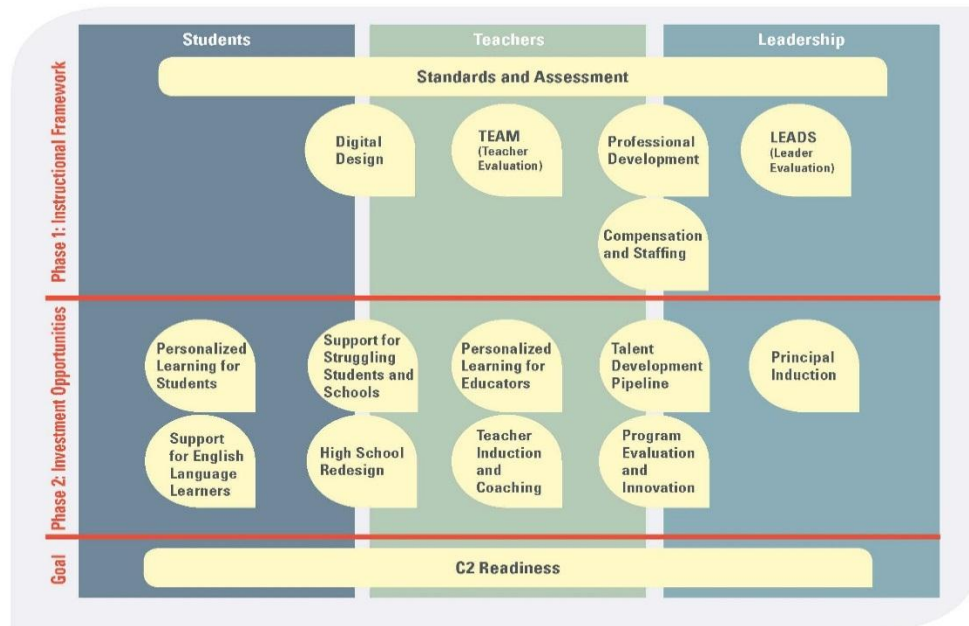
Introduction

May 19, 2014

EngageLCS was born with the mission of aligning resources to support key initiatives directed at teachers, leaders and students to develop students who are “C² Ready”— prepared for college and a career. On December 16, 2013, the Lake County School Board adopted its first Three-Year Strategic Finance Plan (SFP) to support this mission. With this approval, the SFP is poised to guide our annual budgeting process to ensure our instructional priorities are being funded and budget gaps are closed.

This document provides the recommendations for the district’s budget that align with the opportunities outlined in this SFP. Twenty-one work groups have been dedicated to examining and planning each of these opportunities. The work groups have involved more than 150 individuals from schools, the district office and the community.

The following graphic presents a high-level view of the intentional phases the district has undertaken to move this strategic effort. Phase 1 in this graphic outlines the Instructional Framework that was developed under the Race to the Top grant. Phase 2 depicts the Instructional Priorities that emerged from this Phase 1 work.



The SFP earmarks an investment of approximately \$21.1 million for the Phase 2 priorities through 2017. These priorities will support long-term success for students, with the following projected first-year costs for 2014-15:

- Programs for English Language Learners: \$1.0 million
- Programs for Struggling Students and Schools: \$1.0 million
- Talent Development Pipeline: \$1.4 million
- Teacher Induction and Coaching: \$0.4 million
- Principal Induction and Development: \$0.2 million

- Program Evaluation & Innovation: \$0.2 million
- Personalized Learning for Teachers and Leaders: \$1.0 million
- Personalized Learning for Students: \$0.3 million

In addition to funding these priorities, the district has anticipated a significant budget gap for 2014-15 of approximately \$3.8 million. The SFP projects closing this gap as well as funding the priorities for a total of \$9.3 million.

The resource realignment strategies earmarked by the SFP for 2014–2015 comprise the following activities:

- Moving from a block to straight schedule at our high schools
- Centralizing and consolidating purchasing practices
- Strategically reducing our IDEA funding reserve over three years
- Reassigning some capital-related expenses from the general fund to the capital fund
- Creating a lawn care maintenance team, paired with reducing custodial staff by attrition
- Realizing savings from our new transportation routing software
- Continuing to charge a \$1–2 fee to students not eligible to ride the bus under our guidelines
- Contracting for maintenance of the district’s white fleet
- Decreasing funding for athletics travel
- Excluding administrators from salary increases expected for other positions
- Allowing for additional management decisions to drive continuing operational efficiencies

An amazing array of discoveries has occurred within the Work Groups over the last four months as a focus on implementation and actual budget realities emerged. Following is a summary of these discoveries:

ELL and Struggling Students - The English Language Learners and Struggling Students initiatives have been combined to provide the start of a systems-thinking approach to this critical need in the district. This approach targets school needs for additional ELL support and provides assistance to those with the greatest number of Level 1 and Level 2 students by providing Acceleration Resource Teachers. These Teachers will do hands-on work with students while delivering model lessons on a regular basis so teachers, too, can grow in best practice while their students are given special support. In addition, repurposed training for CRTs and Literacy Coaches will help support successful implementation of the new Florida Standards. As the work group’s examination continues, they have determined that they must focus on developing district-wide infrastructure to support the ELL and Struggling Students. This support will be phased-in over the next several years as a part of the EngageLCS initiative with a focus on repurposing and realigning resources.

Talent Development Pipeline – The Talent Development Pipeline is now being negotiated with the LCEA with the background of deep participation by multiple stakeholders in its design. The end result is a plan with multiple paths for teachers, including a solid path to move ahead to leadership roles while staying in the classroom. Effective and Highly Effective teachers can receive bonuses/supplements for teaching in High Poverty/Low Performing (Targeted) schools, as well as performing leadership roles within their schools. The ultimate goal is to keep our best and brightest teachers where they can impact students most, in the classroom.

Teacher Induction and Coaching Framework – We provided the first year of professional development for this initiative with the support of the New Teacher Center. We discovered our overall ratio of coaches to new teachers was inadequate and are submitting a recommendation to improve this ratio with an increased number of coaches for new teachers during this critical beginning phase of their careers. Currently we are waiting for the first-year data results to judge the effectiveness of the New Teacher Center model and make a decision concerning investment in it for 2014-15. Based on the data results, we will make a specific recommendation to the Board on this contractual agreement.

Principal Induction and Development- The launch of this initiative has been delayed until 2015-16. With the new Florida Standards such a key focus this year, the development of our districts' principals will focus on instructional leadership around these standards. This support will take place within the context of the general professional development roll-out for the district.

Program Evaluation and Innovation-The ELL and Struggling Student initiative was presented for review. This was the first effort to use the process. Based on this experience and the need to develop specific protocols and expectations, this support system will be refined and readied for regular use in 2014-15.

Personalized Learning for Teachers and Leaders- With a focus on the new Florida Standards, Florida Standards Teachers will assist middle school and high school sites in embedding professional learning at each school. These Florida Standards Teachers will collaborate with the school Literacy Coaches to form a “dynamic duo” to support personalized assistance for teachers. An ILS and IT Tech will be engaged in bringing more digital support to this effort. Funding for substitutes will add capacity for collaborative time for teachers. Additionally, the district is integrating this EngageLCS initiative with an application process for a Gates Foundation Innovative Professional Development grant which could bring much more funding for the initiative.

Personalized Learning for Students – The EngageLCS initiative is integrated with the Next Gen Systems grant process. The combined efforts of these two funding streams will provide eight schools with planning grants for personalized learning for students during 2014-15 with implementation to follow in 2015-16 for four schools. The EngageLCS funding will provide the district infrastructure for the launching of this initiative in the selected schools.

High School Schedule - The High School Schedule opportunity moved into an incredible push into high school redesign that is adding instructional minutes and a focus on teacher collaboration. The change from block scheduling to seven-period days actually provides \$4.6 million in realignment funding. However, in examining the needs of the high schools, it became evident that testing support and supervisory coverage for before- and-after school segments of time were needed to manage the load of end-of-course exams and the changed bell schedule. Lake County Virtual School is establishing virtual labs at the high schools to assist with the high school redesign.

Consolidated Purchasing – In reviewing the original estimate of realignment funding, it became evident that the actual realignment possibilities were much less than anticipated. After eliminating the expenditures that are not available for consolidation and realignment, the potential that could be considered could not be leveraged for the amount of funding originally projected.

IDEA/Self-Funding Professional Development - These two initiatives were combined as they both deal with federal entitlement funding. The work group and Leadership Team were surprised at how difficult it is to apply the entitlement funding to specific EngageLCS initiatives. The rules surrounding the funding

are strict and the challenge became “putting puzzle pieces together” to make it possible to use the funding.

Maintenance: Lawn Care – After examining outsourcing lawn care and comparing costs, the work group targeted a change in district structure for implementation. This effort was successful in outlining a move to employing district lawn care teams to provide service across school and district sites. The funding that will be realized in year two will be greater than during year one as the teams will be phased in during this first year.

Management Discretion - The across-the-district 2.5 percent decrease in non-salary discretionary budgets provides the needed funding in this category.

Transportation, Bell Schedule and Software- The bell schedule change that takes place this year will affect all schools. Each building level will now have the same start and end times. The routing software will make greater efficiency possible and these savings will start to be realized this year.

Next year a two-tier system will be considered for implementation in 2015-16.

Transportation White Fleet – No savings will be obtained through this initiative. One of the findings, however, that surfaced during this work group’s research is development of a ranking system to establish the age and condition of white fleet vehicles and clarify the upgrades of vehicles needed in this area.

Administrative Salaries – The district is considering performance-based pay for administrators. At this time, administrator salaries are being maintained at their current levels.

Athletics Transportation - Athletic directors at each school have already been at work on their game schedules for 2014-15 and are making adjustments to accommodate reduced funding. The reduction in funding more closely aligns this district cost with other Florida school districts.

Clerical – This initiative is in a research phase. Recommendations will be made for the 2015-16 budget.

Guidance Counselors - This initiative is in a research phase. Recommendations will be made for the 2015-16 budget.

Our goal has been to focus on the Instructional Priorities and realign resources so they could be moved into the line item budget for 2014-15 and be implemented. The following pages outline the work plans for the opportunities identified in the SFP. Each of the Work Groups has submitted a plan that builds on the initiatives originally outlined in the SFP and includes a detailed budget that will be presented as part of the 2014-15 line item budget. The document also provides a high-level look at the balancing of the budget between Instructional Priorities and Realignment Opportunities.

This moment in time represents the opportunity to embrace our bold set of instructional priorities and redefine how we grow student achievement and support students in being C2 Ready. When enacted, this plan will positively transform teaching and learning in Lake County Schools.

Table of Contents

Instructional Priorities/Investment Opportunities	
ELL and Struggling Students & Schools	Page 6
Talent Development Pipeline	Page 9
Teacher Induction & Coaching Framework	Page 11
Principal Induction	Page 13
Program Evaluation & Innovation	Page 14
Personalized Learning for Teachers & Leaders	Page 16
Personalized Learning for Students	Page 18
Realignment Opportunities	
High School Schedule	Page 20
Consolidated Purchasing	Page 22
IDEA/Self-Funding Professional Development	Page 25
Maintenance: Lawn Care	Page 27
Management Discretion	Page 30
Transportation Bell Schedule & Software	Page 31
Transportation White Fleet	Page 33
Administrative Salaries	Page 35
Athletics Transportation	Page 36
Clerical	Page 37
Guidance Counselors	Page 38
Summary of Funding Opportunities	
Overall Picture of SFP Initiatives	Page 39
Summary of Realignment and Investment Opportunities for 2014-15	Page 40
Summary of Staffing Related to Realignment and Investment Opportunities for 2014-15	Page 41

Instructional Priority- ELL and Struggling Students & Schools

Leader: David Christiansen (Chief Academic Officer) and Kati Pearson (Director, Teaching and Learning)

Working group membership:

- Noris Aguayo (New Teacher Instructional Coach)
- Kathy Billar (Principal, Triangle Elementary School)
- Liz Bourdon (Director, Federal Programs)
- Rehana Insanally (Differentiated Accountability Program Specialist)
- Barbara Longo (Principal, Oak Park Middle School)
- Bill Miller (Principal, Leesburg High School)
- Judy Miller (Director, ESE)
- Robin Neeld (Title III Program Specialist)
- Maria Rodriguez-Vargas (ESOL Teacher, East Ridge High School)
- Zhakima Spratley (Differentiated Accountability Program Specialist)
- Jeanette Tietjen (MTSS Program Manager)
- Julio Valle (Principal, Sawgrass Bay Elementary)

Working group objectives/goals to support C² Ready students:

Increase student achievement for ELL students and Level 1 and Level 2 students

Major action steps taken:

- ELL and Struggling Students Working groups merged and re-determined focus, program model, and cost projections
- Plan created and presented to new working group
- Rigor-tested action plan
- Plan presented to Program Evaluation and Innovation Team
- Adjustments made based on Program Evaluation and Innovation Team response
- Plan presented to Executive Cabinet
- Plan presented at Board Workshop on April 7, 2014

Revisions/additions to plan provided to the Board on December 16, 2013:

Objectives:

- English Language Learners: Fund programs aimed at closing the achievement gap of English Language Learner students
- Struggling Students & Schools: Inject additional resources to support struggling students and schools in order to help increase student achievement

Return Metrics:

Subgroup	State Target AMO Reading 2015	District Target AMO Reading 2015	State Target AMO Reading 2016	District Target AMO Reading 2016	State Target AMO Reading 2017	District Target AMO Reading 2017
English Language Learners	49	49	56	60	62	70
Subgroup	District Grad Rate 2012	District Grad Rate 2013	District Grad Rate 2014	District Grad Rate Target 2015	District Grad Rate Target 2016	District Grad Rate Target 2017
Graduation Rate (All Students)	75	78	80	85	90	95
Grad Rate (ELL)	61	57	62	70	80	90
Subgroup	District Reading 2012	District Reading 2013	District Reading 2014	District Reading Target 2015	District Reading Target 2016	District Reading Target 2017
Lowest 25%	66	61	66	76	86	96

Upcoming Milestones:

- Board is apprised of initiative details
- Allocations and job description approved by Board
- Training provided to principals and Acceleration Resource Teachers
- District staff hired
- Begin Year 1 implementation

Final detailed budget for implementation:

Description of position/activity	Funding required
1 ESOL Program Specialist @ \$66,171 for 216 days – Salary & Benefits	\$66,171
1 Secretary II @ \$38,722 for 247 days – Salary & Benefits	38,722
4 Regional ELL School Specialists @ \$55,386 for 196 days – Salary & Benefits	221,544

21 School-Based Acceleration Resource Teachers @ \$55,386 for 196 days – Salary & Benefits	1,163,106
15 Paraprofessionals to support literacy for 30 hours a week @ \$14,508	217,620
Substitutes for professional development	71,098
Computer set-up for 27 staff @ \$1,500	40,500
Supplies/materials for professional development	50,000
Program Cost and Consultants	50,000
In and Out-of-County Travel	10,000
Total	\$1,928,761

2014-15 SFP projected funding for implementation	2014-15 actual funding required for implementation
\$2,000,000	\$1,928,761

Reference: Strategic Finance Plan 2015-2017: Pages 12, 13, 35 and 36

Instructional Priority – Talent Development Pipeline

Leader: Andrea Guogas (Project Manager, Evaluation and Compensation (RTTT))

Working group membership:

- Aurelia Cole (Chief of Administration)
- Melissa DeJarlais (Principal, Fruitland Park Elementary School)
- Liz Hobert (Special Projects Coordinator, Special Projects and Grant Services)
- Michelle Hoppenstedt (Human Resources and Employee Relations Technical/Support Manager)
- Stuart Klatt (President, Lake County Education Association (LCEA))
- Laurie Marshall (Executive Director, Human Resources and Employee Relations)
- Robin Neeld (Program Specialist, Academic Services Unit)
- Gail Rager (Vice President, Lake County Education Association (LCEA))
- Stacey Roberts (Director, Professional Development and Leadership)
- Linda Shepherd (Principal, Lake Minneola High School)
- Maureen Slovak (Budget and FTE Manager)
- Maggie Teachout (Director, Career, Adult and Community Education)

Working group objectives/goals to support C² Ready students:

1. Provide transparent pathways and clear processes for promotion and increased responsibility through the creation of a talent development pipeline for teachers, administrators and district leadership
2. Align the pipeline with the staff compensation system to provide incentives for staff members to improve and gain more responsibility

Major action steps taken:

- Rigor-tested action plan
- The Talent Development Pipeline Work Group met weekly throughout September 2013
- The work group reviewed career ladder plans used in other districts and/or states
- Plans were compared and contrasted – highlights were collected for potential use in our plan
- Research from sample plans was utilized to develop a career ladder for teachers, district staff and school-based administrators
- Reviewed draft with committee, and made revisions
- Committee developed phase-in plan
- Plan was presented to School Board on March 17, 2014

Upcoming Milestones:

- Present plan to LCEA negotiating committee
- Develop communication plan

Final detailed budget for implementation:

Description of position/activity	Funding required
Bonuses for Highly Effective Teachers in targeted schools	TBD*
Bonuses for Effective Teachers in targeted schools	TBD*
Bonuses for Effective/Highly Effective Teachers moving to Target Schools	TBD*
Stipends for Leadership Roles (Stipends for additional roles)	TBD*
Stipends for teachers to take positions in critical shortage areas	TBD*
Total	\$1,025,000

**Instructional compensation is subject to negotiations with LCEA*

2014-15 SFP projected funding for implementation	2014-15 actual funding required for implementation
\$1,400,000	\$1,025,000 *

** First year of implementation is considered a start-up year; expectation is the funding will be fully accessed in Year 2*

Reference: Strategic Finance Plan 2015-2017: Pages 14-5 & 37-40

Instructional Priority – Teacher Induction and Coaching Framework

Leader: Stacey Roberts (Director, Professional Development and Leadership)

Working group membership:

- Liz Bourdon (Director, Federal Programs)
- Randy Campbell (Principal, Umatilla High School)
- Elizabeth Feld (New Teacher Coach)
- Melonee Ferguson (New Teacher Coach)
- Theresa Frisby (New Teacher Coach)
- Andrea Guogas (Project Manager, Evaluation and Compensation)
- Kathy Halbig (Manager of Innovative Learning)
- Rhonda Hunt (Principal, Lost Lake Elementary School)
- Lisa Sabino (New Teacher Coach)

Working group objectives/goals to support C² Ready students:

1. Improve the quality of coaching in the district through establishing a district-wide framework for training instructional coaches
2. Provide new teachers with robust mentoring from instructional coaches, which will increase student achievement and teacher retention

Major action steps taken:

- Rigor-tested action plan
- Reviewed evaluation survey data from Mentor Academy training events held in September, November and February
- Coordinated training and follow up events with New Teacher Center
- Monitored Formative Assessment System used by coaches for data collection
- Researched program options for 2014-2015 school year
- Launched Teacher Induction Survey
- Evaluated data from Teacher Induction Survey for Pilot with New Teacher Center for 2013-2014

Upcoming Milestones:

- Presentation at Board Workshop on April 21, 2014
- Interview and hire Program Manager
- Interview and hire three (3) Instructional Coaches
- Instructional Practice Scores reviewed for new teachers
- New Teacher Center Induction Survey data reviewed for Year 1
- Identify schools participating in Year 2
- Identify school-based coaches participating in Year 2

- Professional development evaluation data for New Teacher Center Mentor Academy 3 and 4 analyzed
- Establish Year 2 program implementation details

Final detailed budget for implementation:

Description of position/activity	Funding required
3 District Instructional Coaches for 196 days @ \$55,386 Salary and Benefits	166,158
1 Program Specialist for 216 days @ \$66,171 Salary and Benefits	66,171
Professional Development Consultant Fees -Year 2 of 2-year contract	100,000
Materials for Professional Development – Year 2 of 2-year contract	5,000
Other Consultant Costs/Travel, Licensing, Consultation – Year 2 of 2-year contract	20,000
Online Coaching Tools – Year 2 of 2-year contract	11,000
In-County Travel for Coaches	5,500
Computer set-up for 4 new Coaches @ \$1,500	6,000
Materials for New Coaches and Manager	500
Total	\$380,329

**2nd year under review*

2014-15 SFP projected funding for implementation	2014-15 actual funding required for implementation
\$400,000	\$380,329

Reference: Strategic Finance Plan 2015-2017 – pages 16, 41-43

Instructional Priority - Principal Induction

Leader: Aurelia M. Cole (Chief of Administration)

Working group membership:

- Melissa DeJarlais (Principal, Fruitland Park Elementary School)
- Laurie Marshall (Executive Director, Human Resources)
- Carolyn Samuel (Director, Human Resources Services)
- Linda Shepherd-Miller (Principal, Lake Minneola High School)

Working group objectives/goals to support C² Ready students:

- Ensure that Principals receive in-depth coaching support during the first two (2) years
- Improve level of coaching presented to all Principals and potential candidates through professional development, one-on-one mentoring and professional learning communities

Major action steps taken:

- Rigor-tested action plan
- Researched Principal coaching and training models
- Interviewed New Teacher Center on training protocol
- Explored National Institute for School Leadership Model
- Designed model for principal induction and development
- Presented model to EngageLCS Leadership Team

Revisions/additions to plan provided to the Board on December 16, 2013:

Components/Activities: Delete the NISL Partnership based on lack of funding for the project by NISL

Timeline: Delay implementation until 2015-2016 based on priority setting by Leadership Team

Upcoming Milestones:

- Board is apprised of initiative details in preparation for 2015-16 implementation
- Allocation and job description approved by Board
- District staff hired
- Begin Year 1 implementation for 2015-2016 school year
- Complete the plan for the New Principal Academy

Final detailed budget for implementation: No budget provided for 2015-15; implementation projected for 2015-16

Reference: Strategic Finance Plan 2015-2017- Pages 17, 44-48

Instructional Priority - Program Evaluation and Innovation

Leader: Kathleen Gingras (Director, Planning, Evaluation and Accountability)

Working group membership:

- David Christiansen or designee (Chief Academic Officer)
- Liz Hobert or designee (Special Projects)
- Rhonda Hunt (Principal, Lost Lake Elementary)
- Carol MacLeod or designee (Chief Financial Officer)
- Laurie Marshall or designee (Executive Director HR/ER)
- Judy Miller (Director, Exceptional Student Education)
- Maggie Teachout or designee (Director, Career, Adult and Community Education)
- Jan Tobias (Director of Student Services)
- Naomi VanAmburg (Federal Programs)
- Creed Wheeler or designee (Executive Director IT)
- Stephanie Wiley (Accountability Analyst)
- Ad hoc members: Principal Representatives and District Staff as needed for innovation submissions and program evaluations

Working group objectives/goals to support C² Ready students:

1. Provide a framework for rigorously evaluating existing and new programs in order to enable the implementation of programs that will ultimately drive student achievement in the most cost-effective way possible
2. Implement and culturally embed a standardized set of steps in the program evaluation process, with clearly assigned ownership of actions at each step, and a clear timeline for decision-making.
3. Develop a culture of data-driven decision making through implementation of this process

Major action steps taken:

- Action plan was developed
- Rigor testing completed for program evaluation and innovation.
- Team re-defined inclusive of additional members
- Innovation proposal of ELL and Struggling Student reviewed

Upcoming Milestones:

- Board approval of job descriptions and allocations for Program Evaluation Manager and Senior Accountability Analyst.
- Hire Program Evaluation Manager and Senior Accountability Analyst positions.

- Facilitate the development of the business processes needed to implement the program evaluation and innovation system.
- Establish metrics to track performance of the Program Evaluation and Innovation process.

Final detailed budget for implementation:

Description of position/activity	Funding required
Program Innovation and Evaluation Specialist for 247 days – Salary and Benefits	84,000
Program Innovation and Evaluation Analyst for 247 days – Salary and Benefits	65,000
Professional Development- Support	3,000
Computer set-up for new hires @ \$1,500	3,000
In-County Travel	3,500
Out of County Travel	1,500
Supplies and Materials	500
Total	\$160,500

2014-15 SFP projected funding for implementation:	2014-15 actual funding required for implementation:
\$250,000	\$160,500 <i>(Initial request included costs for currently funded positions demonstrating incremental use of existing resources; this funding amount focuses on actual new funding required)</i>

Reference: Strategic Finance Plan 2015-2017- Pages 49-52

Instructional Priority - Personalized Learning for Teachers and Leaders

Leader: Kathy Halbig (Manager of Innovative Learning)

Working group membership:

- Brent V. Balkaran (Teacher, Tavares High School)
- Missy Broker (Innovative Learning Specialist)
- Amy Cockcroft (Principal, Windy Hill Middle School)
- Dennis Doherty (Teacher, Windy Hill Middle Schools)
- Kathleen W. Keck (Grants Specialist)
- Kati R. Pearson (Director, Teaching and Learning)
- Andrea R. Pyatt (Curriculum Specialist)
- Stacey R. Roberts (Director, Professional Development and Leadership)
- Julie Robinson-Lueallen (Principal, East Ridge High School)
- Ashley Salamon (Tech Trainer IT)
- Clela L. Stutzman-Horton (Teacher, Lost Lake Elementary School)
- Julio Valle (Principal, Sawgrass Bay Elementary School)
- Nancy Velez (Principal, Eustis High School)
- Creed Wheeler (Executive Director, Information and Instructional Technology)

Working group objectives/goals to support C² ready students:

1. Support College and Career Readiness for all students by supporting the learning journey of teachers and leaders as they transform instructional practice through a sustainable personalized learning environment
2. Promote a culture of self-reflection in a safe and professional learning environment.
3. Empower teachers and leaders to embrace challenges and extend individual skills, interests, and strengths while providing choice in how professional development is delivered and voice in how understanding is demonstrated
4. Connect teachers' and leaders' personalized learning to student academic achievement

Major action steps taken:

- LCS received an invitation from the Bill and Melinda Gates Foundation to submit an Innovative Professional Development Grant (iPD)
- An iPD Design Team was established, and the work of the EngageLCS Personalized Learning for Teachers and Leaders Work Group was integrated with this effort
- The Design Team developed and submitted an iPD Concept Memo on April 1, 2014

Revisions/additions to plan provided to the Board on December 16, 2013:

Components/Activities: Strategies will revolve around effective incorporation of the new Florida Standards

Timeline: Rather than a staggered roll-out, the implementation will be all staff starting in August 2014

Upcoming Milestones:

- Receive word from Gates Foundation on success of Concept Memo in winning an implementation grant invitation
- Develop a full Strategic Plan for roll out of personalized learning for teachers and leaders
- Incorporate Florida Standards Teachers to support middle school and high school transition to the new Florida Standards using personalized learning as the platform of implementation

Final detailed budget for implementation:

Description of position/activity	Total Funding required
1 Innovative Learning Specialist for 201 days-Salary and Benefits	59,547
1 IT Support Tech for 12 month-Salary and Benefits	54,069
13 Florida Standards Teachers for the Middle and High Schools for 196 days @ \$55,386 – Salary and Benefits	720,018
Substitutes to provide collaborative planning time for teachers	250,000
Computer set-up for ILS and 15 Staff @ \$1,500	22,500
Software to support personalized learning	100,000
Total	\$1,206,134

2014-15 SFP projected funding required for implementation	2014-15 actual funding required for implementation
\$1,000,000	\$1,206,134

Instructional Priority - Personalized Learning for Students

Leader: Kathy Halbig (Manager of Innovative Learning)

Working group membership:

- Brent V. Balkaran (Teacher, Tavares High School)
- Missy Broker (Innovative Learning Specialist)
- Amy Cockcroft (Principal, Windy Hill Middle School)
- Dennis Doherty (Teacher, Windy Hill Middle Schools)
- Kathleen W. Keck (Grants Specialist)
- Kati R. Pearson (Director, Teaching and Learning)
- Andrea R. Pyatt (Curriculum Specialist)
- Stacey R. Roberts (Director, Professional Development and Leadership)
- Julie Robinson-Lueallen (Principal, East Ridge High School)
- Ashley Salamon (Tech Trainer IT)
- Clela L Stutzman-Horton (Teacher, Lost Lake Elementary School)
- Julio Valle (Principal, Sawgrass Bay Elementary School)
- Nancy Velez (Principal, Eustis High School)
- Creed Wheeler (Executive Director, Information and Instructional Technology)

Working group objectives/goals to support C² Ready students:

1. Implement personalized learning for students district wide
2. Create a structure of accountability, continuous improvement and innovation to support personalized learning for students including student-directed learning, competency-based learning, learner profiles and pathways and flexible learning environments

Major action steps taken:

- Coordinated EngageLCS Personalized Learning for Students with the Bill and Melinda Gates Foundation NextGen Systems grant to create a seamless plan for Personalized Learning in Lake County Schools
- As part of the planning work for the NextGen Systems grant, created a full strategic plan for the successful implementation of PL
- Presented the Lake County Strategic Plan for Personalized Learning to the Bill and Melinda Gates Foundation in Houston, Texas, on January 30, 2014
- Rigor tested action plan
- Presented the Lake County Strategic Plan to the School Board of Lake County on February 17, 2014

Upcoming Milestones:

- Finalize school-level request for proposal and MOU
- Present MOU template for approval
- Launch branded Personalized Learning communications plan
- Implement Personalized Learning online resources

- Identify necessary resources for Personalized Learning Innovative Learning Specialists
- Provide principal with an overview of the school-level RFP
- Application received and schools notified of status
- Personalized Learning Innovative Learning Specialist assigned to planning grant schools
- Planning grant activities initiated

Revisions/additions to plan provided to the Board on December 16, 2013:

Since this plan was presented to the Board in December 2013, LCS has been awarded, in response to an invitation from the Bill and Melinda Gates Foundation, a Planning Grant for Personalized Learning for students. Participation in this grant from BMGF required that we develop a full strategic plan for personalized learning. We have completed that plan and are currently awaiting the official announcement of grant awards for Phase II of this grant. With the award of this grant, our plan and timeline will be accelerated.

Final detailed budget for implementation:

Even if we are awarded the next phase in the Gates grant, the funds associated with the grant are not available for district staff. This budget represents basic resources needed to implement personalized learning for students.

Description of position/activity	Funding required
2 Innovative Learning Specialists (ILSs) for 201 days @ \$59,547	119,094
Administrative Coordinator (Former Manager of Innovative Learning) - (To be scaled up as initiative is expanded)	-0-
Extended days for two Technical Trainer positions to support the personalized learning initiatives (Cost represents additional days for current employees)	19,352
Computer set-up for 2 new ILS's @ \$1,500	3,000
Funds for Professional Development for the district staff who will be supporting the personalized learning initiatives in the schools.	20,000
Funds to pay for the purchase or development of a digital tool for a Learner profile for students.	80,000
Total	\$241,446

2014-15 SFP projected funding for implementation:	2014-15 actual funding required for implementation
\$300,000	\$241,446

Realignment Opportunity - High School Schedule

Leader: David Christiansen (Chief Academic Officer)

Working group membership:

- Academic Services
- All High School Principals and select lead Teachers
- Select Middle School Principals and Teachers
- CTE, EngageLCS Leadership

Working group objectives/goals:

Move all high schools in LCS from a block schedule to some variation of a 6x7 schedule (exact structure to be determined)

Major action steps taken to reach recommendations

- Established a high school redesign focus with the following objectives
 1. Increase student achievement proficiency levels on EOC, FCAT/New Standards assessment
 2. Increase graduation rate and 9th grade GPA achievement
 3. Implement personalized learning system for teacher support, collaboration, and coaching
 4. Create a personalized learning system to meet the needs of each student
 5. Optimize resources through schedule changes
- Finalized next steps regarding Schedule Redesign with Work Group
- Principal work groups defined problems & goals of schedule redesign with support from Jennifer Frentress from Timewise
- Select high school and middle school principals visited Fresno & Bridgeport to see models in action
- Reviewed take-aways from Fresno and Bridgeport models with principals
- Finalized scheduling model using a phase-in approach
- Oriented principals and teacher representatives from each school to scheduling change and phase-in approach options at a work group session
- Finalized next steps regarding Schedule Redesign with Work Group

Research results:

See Redesign presentation for Board Workshop on February 25, 2014. This presentation outlined current problems of practice and potential increase in instructional time based on resource optimization through standardization of high school schedules.

Recommendation:

- High Schools move to a 7-period day
- Provide the following supports to mitigate this transition:
 - High School Testing Monitors
 - High School Supervision Stipends for 30 minutes before and after school to support new bell schedule based on size of school
 - Work with Lake Virtual School to provide virtual labs at each high school

Budget line item changes based on recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
Expected amount of funding to realign based on original SFP estimate - \$4,600,000 <ul style="list-style-type: none"> • Minus cost of Testing Administration Support Assistant - \$332,976 • Minus cost of school supervision stipends for work beyond the school day before and after school - \$92,400 * • Virtual Labs (self-funded) 	4,600,000 - 332,976 - 92,400 - 0

**Stipends are subject to negotiations with LCEA*

2014-2015 SFP projected realignment	2014-15 actual funding for realignment
\$4,600,000	\$4,174,624

Reference: Strategic Finance Plan 2015-2017- Pages 24 & 25

Realignment Opportunity – Consolidated Purchasing

Name of working group: Consolidated Purchasing

Leader: Carol MacLeod (Chief Financial Officer)

Working group membership: (preliminary)

Pam Hayes (Purchasing Manager)

Tom Mock (LCS Internal Auditor)

Working group membership (ongoing)

Pam Hayes (Purchasing Manager)

Creed Wheeler (Executive Director IT)

John Davis (Chief of Operations)

Mike Corr (Director, Maintenance and Operations)

Tom Mock (LCS Internal Auditor)

To be expanded to include schools and community members.

Working group objectives/goals:

Centralize purchasing processes to realize greater savings.

Major action steps taken to reach recommendations:

Identify 3-4 categories of purchases that could immediately be centralized to realize savings.

Review current processes and make recommendations to improve and enhance the purchasing process.

Research results:

Further review of the estimate indicated that the projection of \$2,000,000 was overly optimistic for the short term. An object-level breakdown of the original General Fund 2013-14 Budget includes budget expenditures of \$280,651,381. After eliminating those expenditures that are not available for further strategic sourcing consideration at this time, such as salaries, benefits, payments to charters, etc., the portion of this budget that can be consideration for strategic sourcing totaled \$12,521,970. The preliminary estimate would require an additional 16 percent reduction in these available funds.

	Original Approved Budget	Available for Strategic Sourcing Consideration
Salaries	155,662,334	
Benefits	44,295,403	
Purchased Services	16,887,039	5,551,321
(Charter Schools)	37,356,624	
Utilities	10,011,163	
Materials & Supplies	9,649,851	5,159,194
Capital Outlay	2,056,190	1,366,720
Other	4,732,777	444,735
Total	\$280,651,381	\$12,521,970
Projected Reduction		\$2,000,000

Percentage Reported		15.97
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Immediately Identified Savings available with minor process changes:

Reduction of Maintenance Inventories - 2014-15 Estimate: \$450,000

Preliminary review of prior year ending inventory balances indicated a rise in the inventory balance on hand compared to prior years. Implementation of the new Skyward Warehouse Module provides a centralized perpetual inventory system which was not sufficiently maintained under the legacy system. It further provides Inventory Turnover Indicators which will allow staff to more closely monitor inventory balances. A reduction of the current inventories will generate the expected savings. In working with the District Auditor it is believed that the projected savings should be considered a minimum value.

Increasing the amount of payments made with district purchasing cards: 2014-15 Estimate: \$300,000

We have been working with our Purchasing Card provider on methods to increase payments to vendors and increase the amount of rebates that the District can earn. Implementation of the Skyward Accounts Payable module has provided a clear and simple manner to identify those vendors that will accept credit card payments. The procurement department had already included a request to accept this option of payment for current and future vendors. Through an existing state-wide program, we are able to leverage our purchasing power with other school districts to earn increased rebate amounts. We are specifically targeting our large vendors to transition to this type of payment. A revised Banking agreement to participate on a state-wide school district pool for increased rebates will be brought to the Board for approval in June 2014.

Consolidation of Janitorial Supply purchasing through the central warehouse - 2014-15 Estimate: \$100,000

During the 2013-14 school year, we have worked toward standardizing janitorial supplies by working with the Maintenance and Procurement Department. This improvement will be fully implemented for the 2014-15. This has allowed the procurement department to value price the supplies determined to meet the needs of the District and maintain those items only in the central warehouse. From a Budgeting perspective, we will segregate a custodial budget for each center in the same manner we have done with substitutes. We will calculate a 3 year average and segregate those funds at each site.

Current Total Identified Savings through initial review of consolidated purchasing for 2014-15: \$850,000 or 6.8% of the available funds for strategic sourcing consideration.

Recommendation:

Complete the implementation of identified savings for 2014-15.

Provide training updates on purchasing policies and procedures to all purchasing contact throughout the District through training and review of a Purchasing Support Manual. This training will be scheduled late April – Early May of 2014.

Establish a District-wide committee “Purchasing Roundtable” that will review and make recommendations to assist in a process of purchasing called Strategic Sourcing. This will include the need to identify and standardize many District purchases to ensure that we are making the most efficient and effective use of limited resources. The main areas of concentration will be Information Technology and Maintenance.

This committee will work through the process of Strategic Sourcing to assess major categories of district-wide purchasing. In a manner similar to the Academic ROI, this will provide data-driven information to support the standardization of numerous types of purchases throughout the District. The committee met in April to discuss general topics, procedures and to determine the appropriate people to extend an invitation to attend that will ensure a broad-based and objective review of our purchasing processes. The larger committee will convene starting in May 2014.

The first topic for the Purchasing Roundtable will be a District-wide printing solution to encompass the District Print Shop and all copiers and printers. The existing contracts for this equipment are nearing expiration and this project needs to be completed prior to the end of the current year.

Budget line item changes based on recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
Reduce maintenance inventories	450,000
Increase amount of payments made with district Purchasing Cards	300,000
Consolidate janitorial supply purchasing through central warehouse	100,000
Total	\$850,000

2014-15 SFP Projected realignment	2014-15 actual funding for realignment
\$2,000,000	\$850,000

Reference: Strategic Finance Plan for 2015-17 – Pages 24 and 25

Realignment Opportunity - IDEA Funding/Self-Funding Professional Development

Leader: David Christiansen (Chief Academic Officer)

Working group membership*:

IDEA

Judy Miller (Director, ESE)
Carol MacLeod (Chief Financial Officer)
Robin Myers (Principal, Lake Hills School)
Trella Mott (Principal, Tavares High School)
Pat Lawson (ESE Administrative Coordinator)
Melissa Lyford (Program Specialist)
Pam Chateauneuf (Principal, Mount Dora High School)
Letizia Haugabrook (Principal, Tavares Elementary School)
Laura Wright (ESE School Specialist, Mount Dora Middle School)

Self-Funding Professional Development

Judy Miller (Director, ESE)
Liz Bourdon (Director, Federal Compensatory Education)
Stacey Roberts (Director, Professional Development and Leadership)
Marilyn Doyle (Sr. Director of Academic Services)
Carol MacLeod (Chief Financial Officer)

**These two Working Groups were combined into one team with members from both teams participating*

Working group objectives/goals:

1. Strategically reduce the amount of ongoing IDEA reserves, spending more of the district's IDEA funding each year (*Note: leads to one-time savings spread over 3 years*)
2. To align professional learning across departments and funding mechanisms to optimize use of resources

Major action steps taken to reach recommendations:

- Compiled current professional learning structures, personnel, and funding
- Sent Spending Money Smartly strategic spending article and template to departments supporting professional development
- Created map of Career-Technical Education, Innovative Technology, Human Resources, Grants, & Lake County Virtual Schools current professional learning structures, personnel, and funding

Research results:

Templates from each department regarding current spending levels have been gathered and are being organized into a format for analysis. This working group will go through an analysis process on spending to appropriately integrate our work to support district goals. This is ongoing work and will continue into the 2014-15 year for planning for 2015-16.

Upcoming Milestones:

- Align professional learning across departments and funding mechanisms
- Finalize alignment of professional learning across departments and funding mechanisms

Recommendation:

Recommend using \$333,126 of the IDEA Funding, \$980,622 of new Title I funding, and realignment of \$316,137 of Title II funds to be used for support of the ELL/Struggling Students Instructional Priority.

Budget line item changes based on recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
IDEA Funding – Provided 12% of all IDEA applicable EngageLCS costs	333,126
Self-Funding Professional Development to support ELL & Struggling Students: <ul style="list-style-type: none">• Provided \$980,622 of funding through Title I to support 15 Acceleration Resource Teachers and 15 Paraprofessionals to support literacy• Provided \$316,137 of funding through Title II to support 6 Acceleration Resource Teachers	1,296,759
Total IDEA/Self-Funding Professional Development	\$1,629,885

2014-15 SFP projected realignment	2014-15 actual funding for realignment
\$1,100,000 <i>(Combined IDEA and Self-Funding across professional development initiatives)</i>	\$1,629,885

Reference: Strategic Finance Plan 2015-2017 – Pages 24, 25 and 29

Realignment Opportunity– Maintenance: Lawn Care

Leader: John P. Davis (Chief of Operations)

Working group membership:

- Tom Mock (LCS Internal Auditor)
- Wayne Kicklighter (Maintenance Manager)
- Gary Rogers (Maintenance Manager)
- Mark Kelly (Grounds Department)
- Terry White (Custodian, Pine Ridge Elementary)
- Gregg Moore (Custodian, Umatilla Middle)
- Mark Murray (Custodian, East Ridge High School)
- Alphonso Williams (Custodian, Treadway Elementary School)
- Jonathan Owens (Assistant Principal, Lake Minneola High School)
- Mike Corr (Director, Maintenance and Operations)
- Kim Cronin (SEIU Representative)

Working group objectives/goals:

- Create a lawn care team to provide services to all facilities
- Through attrition, reduce the number of custodians at each school by approximately 1

Major action steps taken to reach recommendations:

- Convened team to develop a methodology for strategically allocating school staff and equipment to provide an economical district-wide lawn-care service.
- Documented current lawn care practice
- Established cost of current lawn care practice
- Developed other models for district lawn care service
- Identified needed staff
- Developed financial models for each lawn care method
- Developed recommendation for Leadership Team (Policy, Budget, etc.)
- Presented recommendation at Board Workshop on April 7, 2014

Research results:

The work group researched outsourcing and found it to more expensive than LCS's current lawn-care costs. Because of this, the work group focused on possibilities around changing current structure internally.

At the district's 41 school sites, the custodial staff currently provides the personnel to maintain the grounds at the facilities. The staff hours required to perform this service vary depending on the size of the school and school site. In general, the average elementary requires 0.62 staff per day, the average middle school requires 1.63 staff per day and the average high school requires 1.75 staff per day. This information is based on a survey conducted with the various school sites from February 21 to March 2.

The total staff per school type is as follows:

Elementary: 0.62 x 22 sites = 13.64 staff
 Middle: 1.63 x 10 sites = 16.3 staff
 High: 1.75 x 9 sites = 15.75 staff
 Total: 45.69 staff

The cost for these staff members is:

45.69 staff x \$30,106.34 (average custodian pay with benefits) = **\$1,375,558.67***

**Plus cost of equipment, equipment repair, fuel, etc.*

Recommendation:

Form five (5) Grounds Care Teams of four (4) staff members each to provide lawn/grounds care for the 32 elementary and middle school sites. High schools would continue to perform their own grounds care due to their athletic fields.

The district currently has 154 pieces of mowing equipment that would be used by the grounds teams; therefore, no costs were included for grounds-care equipment.

The current staffing formula has one (1) custodian for every 20,000 sq. ft. of building and covered walkways schools district-wide. The proposed staffing formula would have one (1) custodian for every 23,500 sq. ft. of occupied buildings and covered walkways for elementary and middle schools and one (1) custodian for every 20,000 sq. ft. for high schools district wide:

The 2013-2014 district staffing formula includes 271.5 custodial allocations. The proposed staffing formula for 2014-2015 includes 239.75 custodial allocations, which is a reduction of 31.75 allocations. Through natural attrition, such as when a position opens a school, the reduction goal will be met by either not filling the open position or filling it with a custodian working fewer daily hours. In addition, the proposed reduction of 31.75 custodial allocations will be mitigated by the creation of 20 Grounds Care positions, which will primarily be filled by current custodians. The proposed staffing formula does not apply to the 20 Head Custodian II allocations and the 11 Head Custodian I allocations.

Budget line item changes based on recommendation:

Description of action to be taken
Cost of 5 grounds care teams of 4 staff members each: <u>First year cost:</u> 20 staff x \$31,904.50 = \$638,090 Five (5) pickup trucks and trailers x \$46,000/set up = \$230,000 Cost/mile = \$1.38 x 60 miles/day x 247 days x 5 teams = \$102,258 Fuel for mowers/equipment: 10 gal/day x 5 teams x 247 days x \$2.71/gal = \$33,468.50 High school lawn care: 15.75 staff x \$30,106.34 = \$474,174.86 Reduction in Custodial staff: 11.75 staff x \$30,106.34 = \$353,749.50 \$638,090.00 (Salaries) + \$230,000.00 (trucks/trailers) + \$102,258.00 (mileage) + \$33,468.50 (fuel) + \$474,174.86 (high school lawn care) - \$353,749.50 (staff reduction) = \$1,124,241.86 A \$251,317 savings over the current cost of operation.

Cost each year after first-year:

\$1,124,241.86 (first year cost) - \$230,000 (one-time cost for trucks/trailers) = **\$894,241.86**

A \$481,317 savings over the current cost of operation.

Custodial Staffing

Current staffing formula:

One (1) custodian for every 20,000 sq. ft. of building and covered walkways schools district wide:

Head Custodians II: 30

Head Custodians I: 11

Custodians: 271.5

Total Custodians: 312.5

Proposed staffing formula:

One (1) custodian for every 23,500 sq. ft. of occupied buildings and covered walkways for elementary and middle schools and one (1) custodian for every 20,000 sq. ft. for high schools district wide:

Head Custodians II: 30

Head Custodians I: 11

Custodians: 239.75

Total Custodians: 280.75

Resulting funding for alignment to Investment Opportunities

\$251,317 (Based on a phase-in model during 2014-15)

2014-15 SFP projected realignment	2014-15 actual funding for realignment
\$500,000	\$251,317

Reference: Strategic Finance Plan 2015-2017 Pages 24 & 25

Realignment Opportunity – Management Discretion

Leader: Carol MacLeod (Chief Financial Officer)

Working group membership:

Leadership Team

- Susan Moxley (Superintendent)
- David Christiansen (Chief Academic Officer)
- Laurie Marshall (Executive Director of HR)
- Creed Wheeler (Executive Director of IT)
- Aurelia Cole (Chief of Administration)
- John Davis (Chief of Operations)
- Marilyn Doyle (Sr. Director Academic Services)
- Chris Patton (Communications Officer)
- Liz Hobert (Coordinator Special Projects)

Working group objectives/goals:

Determine additional operational and central office efficiencies on an ongoing, rolling basis

Major action steps taken to reach recommendations:

- Reviewed the discretionary budgets of department and schools for 2013-14
- Identified reductions that could be recommended with minimal disruption from the prior year

Research results:

2013-14 – Non-Salary Discretionary Budgets

- Schools: \$2,694,663
- Departments: \$10,380,010

Recommendation:

Reduce Non-Salary Discretionary Budgets by 2.5%:

Schools: \$67,367

Departments: \$259,500

Total: \$326,867

Budget line item changes based on recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
Reduce non-salary discretionary budgets for schools and departments from prior year by 2.5%	\$326,867
2014-15 SFP projected realignment	2014-15 actual funding for realignment
\$300,000	\$326,867

References: Strategic Finance Plan 2015-2017 - Pages 24 and 25

Realignment Opportunity Recommendations - Transportation Bell Schedule & Software

Leader: John P. Davis (Chief of Operations)

Working group membership:

- Scott Pfender – (Supervisor, Transportation)
- Will Davis – (Geographic Information Systems)
- Harris Jacobs – (Information Services Manager)
- Charlie McDaniel – (Principal, East Ridge Middle School)
- Rhonda Boone – (Principal, Treadway Elementary)
- Roger Rice – (Assistant Principal, Leesburg High School)
- Kim Varnadore – (SAC Representative, Mount Dora High School)
- Beth Shaver – (SAC Representative, Grassy Lake Elementary School)
- Mike Woods – (Planner, Metropolitan Planning Organization)
- Freddy Williams – (Representative Boys and Girls Club)
- Ken Wells – (Bus driver, Leesburg lot)
- Linda Monroe – (Bus driver, Lake Ridge lot)

Working group objectives/goals:

- Year 1 - Determine bus schedule efficiencies from implementation of routing software
- Years 2 and 3 – Align school bell schedules so that more students can share routes

Major action steps taken to reach recommendations:

- Document current three-tier bus schedule
- Establish cost of current three tier bus schedule
- Investigate effects of school start times by grade levels
- Investigate student safety on bus with mixed grade levels
- Develop model for two-tier bus routes
- Establish cost of proposed two-tier bus schedule
- Recommendations to Leadership Team (Policy changes, Budget, etc.)

Research results:

This committee was charged with the task of investigating the benefits of going to a two (2) tier bus routing system to replace the three (3) tier current system to see if there were any savings to be achieved.

Current Three-Tier busing Schedule

The three-tier busing schedule has the high schools starting first at approximately 7:30 a.m. followed by the elementary schools at approximately 8:30 a.m., then the middle schools at approximately 9:10 a.m. It was discussed that starting and ending times for schools are not consistent; times are set by each school. The inconsistency of the starting and ending times makes it hard to get the students to their various schools in a timely manner.

The committee discussed several issues including school start times, student safety on the buses, number of buses required to run a two-tier routing system and what is the best order for the schools' start times. The committee discussed the two-tier and three-tier routing systems and agreed that a two-tier system could save time and fuel but were concerned if there were enough buses to run a two-tier system. The new software that is being installed now will be able to maximize the efficiency of the routes to the point that the current bus fleet should be able to handle the student load.

To address safety on buses with mixed grade levels of high and middle school students, the work group discussed having a pool of bus attendants. The attendants would be assigned to buses having issues with student discipline to assist the driver. The work group also discussed having the younger students sit in the front of the bus, with the older students sitting in the back.

Recommendation:

It was the consensus of the committee that the combination of the high/middle school should go first in making this change. The elementary schools could follow with an effort to keep their start time as close to the current start time as possible. This recommendation for a two-tier system would take effect for 2015-16 with projected savings of \$1,200,000.

Budget line item changes based on recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
Use new routing software to route the current 3-tier system for 2014-2015	\$200,000
2014-15 SFP projected realignment	2014-15 actual funding for realignment
\$300,000	\$200,000

Reference: Strategic Finance Plan 2015-2017: Pages 24 and 25

Realignment Opportunity Recommendations – Transportation White Fleet

Leader: John P. Davis (Chief of Operations)

Working group membership:

Scott Pfender (Supervisor of Transportation)

Jerome Foster (Mechanic for white fleet)

Randy Belton (Service Manager)

Steve Ham (Parts Manager)

Keith Stephenson (Lake County Government Transportation Fleet Specialist)

Mike Corr (Director, Maintenance and Operations)

Kim Cronin (SEIU Representative)

Working group objectives/goals:

Contract with multiple repair shops in Lake County to perform maintenance on the district's white fleet (a strategy already in motion by the district).

Major action steps taken to reach recommendations:

- Document current practice.
- Establish current mileage and condition of white fleet.
- Establish cost of current practice.
- Identify types of outsourced repairs.
- Identify specialty equipment and needs.
- Investigate various optional outsourcing methods.
- Develop financial models for each outsourcing method.

Research results:

This committee was charged with the task of investigating the benefits of outsourcing various mechanical work for the white fleet of Lake County School District to see if there was any savings to be achieved by outsourcing work. The current staffing situation negates the need for this approach.

The committee met Feb. 12, 19 and 26, 2014, and discussed current practices, condition of the white fleet, the cost of the current practice compared to cost of outside repairs performed over the last year and identified the main type of repairs. In the past, the school district has only had one (1) mechanic assigned to perform repairs on the total white fleet of over 250 vehicles. Historically, when there have been a large number of vehicles that required repairs, a backlog of vehicles developed. The average age of the white fleet is about 14 years and as a result, it is typical for a large number of vehicles to develop problems on any given day.

In the last year, some work was outsourced to local mechanics to reduce the backlog of vehicles in need of repair. This year the School Board authorized the hiring of two (2) additional white fleet mechanics who are just getting on board and will greatly relieve the work load on the current white fleet mechanic and at a lower cost than has been experienced. The committee thinks this additional help will do away with the need to outsource any work in the near future with the exception of vehicle body work due to accidents. We currently have an in-house body repair person that handles most of the minor body work, but major accidents that can be repaired still need to be outsourced.

Recommendation:

During the course of the meetings, the need to replace the oldest of our white fleet became a major issue with the committee. Transportation has developed an A-F ranking system to establish the condition of the white fleet. The white fleet was inspected and each vehicle was rated A, B, C, D or F. Of the more than 250 white fleet vehicles, 54 have an F rating, and 33 of those are assigned to the Maintenance Department. These are some of the vehicles that are driven the most and are depended upon to get staff to the facilities that require work. As the white fleet continues to get older, the productivity of the maintenance staff declines. Due to vehicles being out of service, two maintenance staff members have to share a vehicle which results in not being able to complete as many work orders in the same amount of time. The committee is requesting that the School Board consider allocating funds over the next few years to start replacing the white fleet and reduce the number of F rated vehicles.

Budget line item changes based on recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
None	\$0

2014-15 SFP projected realignment	2014-15 actual funding for realignment
\$40,000	\$0

Reference: Strategic Finance Plan 2015-17 – Page 26

Realignment Opportunity - Administrative Salaries

Leader: Aurelia M. Cole (Chief of Administration)

Working group membership:

Leadership Team

- Susan Moxley (Superintendent)
- David Christiansen (Chief Academic Officer)
- Carol MacLeod (Chief Financial Officer)
- Laurie Marshall (Executive Director, Human Resources and Employee Relations)
- Creed Wheeler (Executive Director, Information and Instructional Technologies)
- John Davis (Chief of Operations)
- Marilyn Doyle (Sr. Director Academic Services)
- Chis Patton (Communications Officer)
- Liz Hobert (Coordinator Special Projects)

Working group objectives/goals:

Exclude district and school administrators from any planned salary increases, until performance-based pay system is established. *(A separate district team is creating a performance-based salary system.)*

Major action steps taken to reach recommendations:

Recommendation was the result of the preliminary study conducted in Fall 2013

Research results:

2013-14 – Administrative Salaries equal \$12,408,705. The Strategic Finance Plan Included an estimate of the dollar amount equivalent to “step” for all employee groups in the Baseline budget for the plan. For Administrators this is 2% and equals \$248,174.

Recommendation:

2014-15 – Maintain present administrator salaries with new administrators entering on the new salary schedule. Continue the process of taking a proposal for performance pay for administrator salaries to the Board for 2014-15.

Budget line item changes based on recommendation:

Description of action to be taken	Funding for alignment to Investment Opportunities
Maintain current salaries for existing personnel until new performance-based salary system is launched	\$248,174

2014-15 SFP projected realignment	2014-15 actual funding for realignment
\$200,000	\$248,174

Realignment Opportunity – Athletics Transportation

Leader: Aurelia M. Cole (Chief of Administration)

Working group membership:

- Trish Highland (District Athletic Director)
- Rob McCue (Principal, South Lake High School)
- Scott Pfender (Supervisor Transportation)

Working group objectives/goals:

Reduce athletics transportation funding to schools by 25%

Major action steps taken:

- Presented the Athletic Transportation Model to Athletic Directors at workshop
- Discussed and prepared for scheduling athletic events for school year 2014-15

Research results:

Comparison to other district’s athletic budgets showed that LCS spends more on athletic transportation. Districts that eliminated travel for out-of-county travel, except for district contests, spend less on athletic transportation. The scheduling of athletic events play a major role in costs savings.

Recommendation:

Athletic transportation budgets be reduced by 25% in 2014-2015. The 2013-2014 budget is \$467,000; the 2014-2015 budget will be \$350,250.

Budget line item changes based on recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
Over-all athletic transportation budget decreased for 2014-2015 by 25%	\$116,750

2014 -15 SFP projected realignment	2014-15 actual funding for realignment
\$100,000	\$116,750

Reference: Strategic Finance Plan 2015-2017 – Pages 24 & 2

Realignment Opportunity – Clerical Work Group

Leader: Carolyn Samuel (Director Human Resources)

Working group membership:

- Tom Mock (LCS Internal Auditor)
- Creed Wheeler (Executive Director, Information and Instructional Technology)
- Angela Jones (Administrative Assistant to Chief of Operations)
- Jennifer L. Pease (School secretary, Carver Middle)
- Yvette Kinsler (Clerical Assistant, Leesburg High School)
- Diane Lingerfelt (Fiscal Assistant, Risk Management)
- Kimberly Jarvis (Principal, Groveland Elementary School)
- Julie Summerlin (Coordinator, Career, Adult and Community Education)
- Jani Ness (Bookkeeper, Lake Minneola High School)
- Charlene Moye (HR Specialist)
- Jessica Hopperton (Data Entry, Virtual School)

Working group objectives/goals:

No action; further study of clerical roles

Major action steps taken:

- Met with person responsible for District Staffing Plan
- Met with person responsible for allocation formula for schools
- Collected and reviewed data for the number of clerical personnel per center by categories reflected in the EngageLCS document
- Collected and reviewed data for student enrollment by school
- Collected other district allocation plans and compared them to Lake County Schools
- Collected information on daily demands of workflow and volume from schools and district levels
- Created a list of district clerical personnel physical locations
- Met with Clerical Work Group to develop plan of action to finalize work for 2014-2015
- Reported plan of action to district leaders

Budget line item changes based on recommendation: Report not due until Fall 2014

Reference: Strategic Finance Plan 2015-2017 – Pages 25 & 26

Realignment Opportunity – Guidance Counselors

Leader: Jan Tobias (Director, Student Services)

Working group membership:

- Cherie Burgess (Guidance Counselor, South Lake High School)
- Angela Ratter (District Counselor)
- Stacy Pallitto (Guidance Counselor, Treadway Elementary School)
- Jeanette Tietjen (Manager, MTSS, RTI)
- Kristine Hawkins (Administrative Coordinator, Student Services)
- Michelle Carpenter (Parent)
- Debra C. Rogers (Principal, Umatilla Elementary School)
- Caroline O'Connor (Guidance Counselor, Windy Hill Middle School)
- Pat L. Lawson (ESE Administrative Coordinator)
- Paula Wicker (Testing Manager)
- Tonya Mass (Program Specialist, Testing)
- Nancy Schwartz (Parent, TSIC mentor)
- Denise Burry (Parent)
- Mollie Cunningham (Principal, Carver Middle School)
- Pam Chateaufneuf (Principal, Mount Dora High School)
- Gail Rager (LCEA Vice President)
- Ken Lyford (District Counselor, Student Services)

Working group objectives/goals:

Align counselor allocation ratios and responsibilities to state frameworks and best practices

Major action steps taken to reach recommendations:

- Created working group goals:
 - Review current allocation formula and propose alternative allocations options
 - Review state and district counselor frameworks to bring counselor responsibilities into alignment
 - Collect any additional needed information for informed decision-making
 - Present several comprehensive options as recommended by the team
- Collect information from surrounding and like-size districts regarding responsibilities of counselors
- Review data collected from other districts as well as state and district counselor frameworks
- Engage team in Situation Appraisal to clarify negotiables and non-negotiables
- Obtain feedback from stakeholders through team members
- Develop rubric of alternative plans to present to Leadership
- Develop projected outcomes to measure student engagement, student achievement, and behavioral well-being

Recommendation: Due September 2014

Resource: Strategic Finance Plan 2015-2017 – Page 26

Overall Picture of SFP Initiatives

Realignment Opportunities			
	2014-15	2015-16	2016-17
Shift of expenses out of general fund (\$M)			
Capital expenditures	1.5	1.5	1.5
Realignments within general fund (\$M)			
High school schedule	4.6	4.7	4.8
Consolidated purchasing	2.0	3.0	3.0
IDEA funding (non-recurring)	0.5	0.5	0.5
Maintenance: lawn care	0.5	0.8	0.8
Management discretion	0.3	0.5	0.5
Transportation ¹	0.4	1.7	1.7
Administrative salaries	0.2	0.3	--
Athletics transportation	0.1	0.1	0.1
Clerical	--	0.2	0.5
Guidance Counselors	--	To be determined	To be determined
Other TBD ideas	--	--	3.5
Total	10.1	13.3	16.9

Investment Opportunities			
	2014-15	2015-16	2016-17
Baseline (\$M)			
Surplus (gap)	(3.8)	(7.1)	(10.4)
IP Costs (\$M)			
Roll forward from previous yr	--	1.4	1.0
ELL	(1.0)	(1.0)	(1.0)
Struggling Students & Schools	(1.0)	(1.0)	(1.0)
Talent Development Pipeline	(1.4)	(1.6)	(1.6)
Teacher Induction & Coaching	(0.4)	(0.4)	(0.4)
Principal Induction & Development	(0.2)	(0.2)	(0.2)
Program Evaluation & Innovation	(0.2)	(0.2)	(0.2)
Pers. Learning (Teachers/Leaders)	(1.0)	(1.2)	(1.3)
<i>Self funding across PD initiatives</i>	0.6	0.6	0.6
Pers. Learning (Students)	(0.3)	(1.6)	(2.7)
<i>Self funding</i>	--	--	0.3
Total: priorities only	(5.5)	(5.8)	(7.4)
Total: net of self-funding	(4.9)	(5.2)	(6.5)
Total: incl. baseline gap	(8.7)	(12.3)	(16.9)
Net surplus (gap)	1.4	1.0	--

Summary of Realignment and Investment Opportunities for 2014-15

Realignment Opportunities		
	Approved SFP 2014-15	Estimated Actual 2014-15
Shift of Expenses out of General Fund		
Capital Expenditures	1,500,000	2,000,000
Realignment within General Fund		
High School Schedule	4,600,000	4,600,000
Consolidated Purchasing	2,000,000	850,000
IDEA Funding	500,000	333,126
Maintenance - Lawn Care	500,000	251,317
Management Discretion	300,000	326,867
Transportation	400,000	200,000
Administrative Salaries	200,000	248,174
Athletic Transportation	100,000	116,750
Clerical	2015-16 -	-
Guidance Counselors	2015-16 -	-
Other TBD Ideas	2015-16 -	-
Total Realignments (Projected)	10,100,000	8,926,234
Self-Funding PD (TITLE I/ TITLE II) (Moved from Investment Opportunities)	600,000	1,296,759
	-	
Total	<u>\$ 10,700,000</u>	<u>\$ 10,222,993</u>

Investment Opportunities		
	Approved SFP 2014-15	Estimated Actual 2014-15
Baseline		
Roll Forward (GAP)- Estimated	(3,800,000)	(3,500,000)
Adjustment to Free Title II		(316,137)
Net Roll Forward (GAP)	(3,800,000)	(3,816,137)
Instructional Priorities Costs		
Roll Forward from previous year	-	-
ELL / Struggling Students and Schools	(2,000,000)	(1,930,261)
Talent Development Pipeline	(1,400,000)	(1,025,000)
Teacher Induction & Coaching	(400,000)	(380,329)
Principal Induction & Development	(200,000)	-
Program Evaluation & Innovation	(200,000)	(160,500)
Pers. Learning (Teachers/Leaders) Self-Funding Across PD Initiatives (Moved to Realignment Opportunities)	(1,000,000)	(1,206,134)
	-	-
Pers. Learning (Students) Self-Funding	(300,000)	(241,446)
	-	-
Total: Priorities Only	(5,500,000)	(4,943,670)
Additions:		
High School Testing Facilitator/Supervision		(425,376)
Virtual Labs (Self-Funded)		-
Total Investments	(5,500,000)	(5,369,046)
Total Including Baseline Gap	(9,300,000)	(9,185,183)
Roll Forward for Year 2 Investments in Instructional Priorities (Gap)	<u>\$ 1,400,000</u>	<u>\$ 1,037,810</u>

Summary of Staffing Related to Realignment and Investment Opportunities for 2014-15

Realignment Opportunities						Investment Opportunities					
	Admin	Instructional	Professional	Managerial	Classified		Admin	Instructional	Professional	Managerial	Classified
Realignment within General Fund						Staffing for Instructional Priorities					
High School Schedule Teachers		(72.00)				ELL / Struggling Students and Schools					
						ESOL Program Specialist		1.00			
						Regional ELL School Specialists		4.00			
						Acceleration Resource Teachers		21.00			
Maintenance - Lawn Care Custodians					(11.75)	Secretary II					1.00
						Paraprofessionals to Support Literacy					15.00
						Substitutes for Teacher PD - TBD					
						Teacher Induction & Coaching					
						District Instructional Coaches		3.00			
						Program Specialist		1.00			
						Program Evaluation & Innovation					
						Program Innovation & Evaluation Specialist			1.00		
						Program Innovation & Evaluation Analyst			1.00		
						Pers. Learning (Teachers/Leaders)					
						Innovative Learning Specialist (ILS)		1.00			
						IT Tech Support					1.00
						Florida Standards Teachers		13.00			
						Substitutes for Teacher Collaboration - TBD					
						Pers. Learning (Students)					
						Innovative Learning Specialist (ILS)		2.00			
						Reclassify Administrative Coordinator					
						Extended Days for 2 Technical Trainers					
						High School Schedule					
						Testing Facilitators (Certified)			8.00		-
						Virtual Learning Lab Facilitators					8.00
Total Realignment Opportunities	-	(72.00)	-	-	(11.75)	Total Investment Opportunities	-	46.00	10.00	-	25.00
						Net Change	-	(26.00)	10.00	-	13.25