# ENGAGELCS

**Preliminary list of ideas on funding our Instructional Priorities**

Released: October 11, 2013

**ERS** Education Resource Strategies

**BCG** THE BOSTON CONSULTING GROUP

Compensation & Staffing

Professional Development

Technology

Teaching & Learning
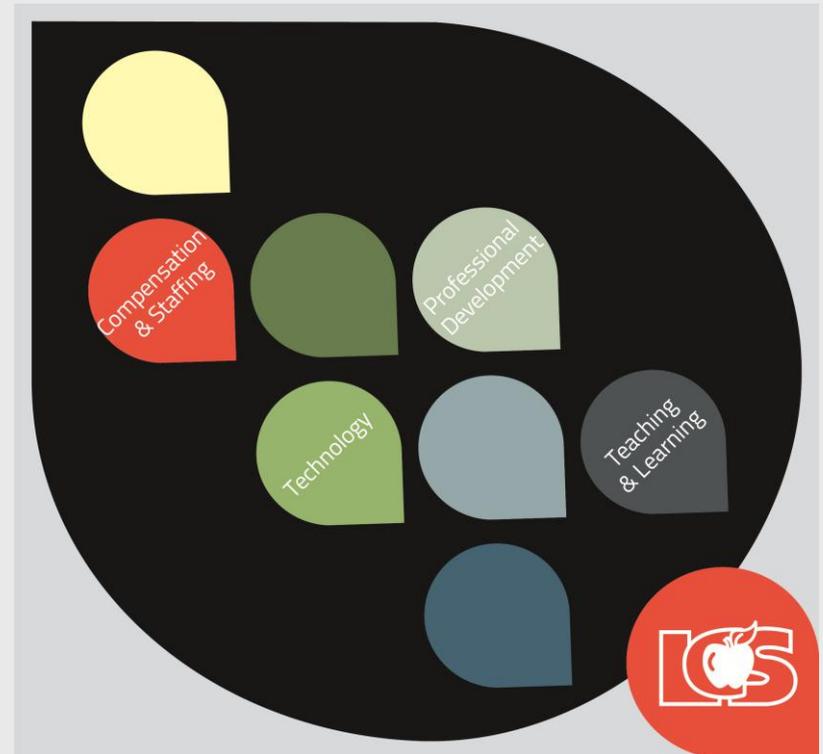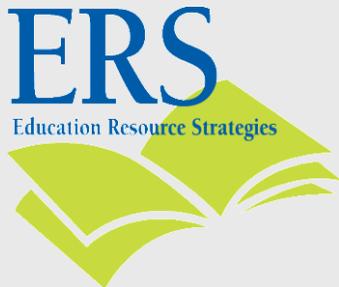
# Recall: We are entering the second phase of the 18-month EngageLCS initiative

*Current focus*

| July – Sept 2013 | Sept – Nov 2013 | Nov 2013 – April 2014 | April – May 2014 | May – Oct 2014 |
|---|---|---|---|---|
| **1 Establish fact base** | **2a Update, develop, launch** / **2b 3-Year Finance Plan** | **3 Return on Investment** | **4 Review and reflect** | **5 Continue** |
| • Analyze current budget allocations and expenditure, in partnership with external technical assistance provider Education Resource Strategies (ERS) | • Develop hypotheses, create detailed plans, and launch initiative teams<br><br>• Develop a rolling 3-Year Strategic Finance Plan similar to the District's capital plan, to be updated annually | • Link the 2014-2015 budget to the 3-Year Strategic Finance Plan, shift culture to emphasize ROI | • Debrief on the lessons learned to help determine any changes to the processes for the next budget cycle. | • Begin the second cycle of implementation of the 3-year Strategic Finance Plan. |

# On October 1, we shared data on how we spend our money; today, we will share initial ideas on how to spend it better

| September | October | November | December – April |
|---|---|---|---|

**1** Establish fact base

**2a** Update, develop, launch — **3** Return on Investment

**2b** 3-Year Finance Plan

*As we share information and ideas …*

✓ **Oct.1 –** Initial analysis of LCS resource use published on Mindmixer

*Today* **Oct.11 –** Initial resource alignment ideas collected and published on Mindmixer

**Oct 24 –** Second and final resource use analysis and refined list of resource alignment ideas published on Mindmixer

*Looking ahead: Ideas inform 3-year Strategic Finance Plan completed in December; Plan informs the 2014-2015 budget*

*… we want to include your input*

✓ **Oct.1 – Mindmixer open for comments on resource analysis and opportunity**

**Nov 4. – Mindmixer last day to provide comments on resource use analysis and list of opportunities**

# More on where we are headed: This work builds to our 3-year Strategic Finance Plan

**LCS is producing its first 3-year Strategic Finance Plan**

**We envision that the Strategic Finance Plan will:**
- Include baseline estimate of revenues and expenditures
- Incorporate details of additional investments to fund our instructional priorities
- Include a prioritized list of actions to free resources

**The plan will not touch every area of the budget or, necessarily, every department within the LCS organization**

**The Strategic Finance Plan will inform the 2014-2015 LCS budget**

**Cycle will continue in future years: Rolling 3-year plan will be updated annually similar to district's capital plan**

# Our 4 instructional priorities are at the heart of this process

A core piece of the Strategic Finance Plan is a set of decisions on how we fund our priorities

| | |
|---|---|
| **Compensation & Staffing** | **Professional Development** |
| Create a talent development pipeline for teachers and leaders | Implement a coaching framework for teacher and principal induction and instructional coaches |
| **Technology & Personalized Learning** | **Teaching & Learning** |
| Establish personalized learning through digital support for teacher/leader professional development and student instructional delivery | Implement an innovation process to initiate and extend promising initiatives |

# Compensation and Staffing

## The need

Lake County Schools does not reward teachers for excellence in the classroom, nor does it recognize that some instructional positions require different skill sets. The compensation system for LCS is a one-size-fits-all approach. We know this approach with students does not support increased student achievement, nor does it recognize teacher quality.

## The investment: Where our dollars will go

- Increased pay for teachers who demonstrate high effectiveness

- Opportunity for effective teachers to earn leadership roles at the department, school, and district level

# Professional Development

## The need

We know new teachers need focused and intense support during the first two years of their induction into teaching in order to support academic achievement and to retain our best talent.

Our principals, as the instructional leaders of our schools, are central to our students' achievement. However, Lake County has no funding and no formal support system for coaching new principals.

## The investment: Where our dollars will go

- Increased time with instructional coaches for new teachers

- Induction program and coaching for new principals

- Rigorous, district-wide protocol for training instructional coaches to assure coaching is high in quality and schools use a unified approach

# Technology & Personalized Learning

## The need

Across our schools, our students have a wide variety of starting positions in terms of academic achievement. We know a one-size-fits-all approach does not serve students or teachers. We also know that by using technology smartly in the classroom, we can tailor our approach to the academic needs of students and the developmental needs of teachers. In doing both, we have the opportunity to increase student achievement.

## The investment: Where our dollars will go

- Anytime / anywhere learning for students supported by technology

- Learning programs for students tailored to individualized need

- Flexible learning environments: small-group learning, group teaching, targeted one-on-one attention

- Technology-supported personalized learning for teachers to aid professional development

# Teaching & Learning

<div style="text-align:center"><strong>The need</strong></div>

We have implemented numerous programs aimed at enhancing student learning and achievement. Are these programs achieving the objectives we have put in place? Are they as good or better than any other available program aimed to achieve the same outcome? Looking ahead to new programs, do we have an evaluation method that will allow us to make the best decision about whether, how much, and for how long to fund them?

<div style="text-align:center"><strong>The investment:<br>Where our dollars will go</strong></div>

- Investment in promising and proven instructional programs

- Standardized, centralized process for evaluating innovative programs and determining which to implement, based on weighing costs against projected return (e.g., academic outcomes)

# We can think about the investment required to implement our priorities similar to how we think about a family budget

For example . . .

**Suppose you want to save for a child to go to college**

**In order to do so, you spend less in some areas to devote $ to college fund**



Today

Future

9
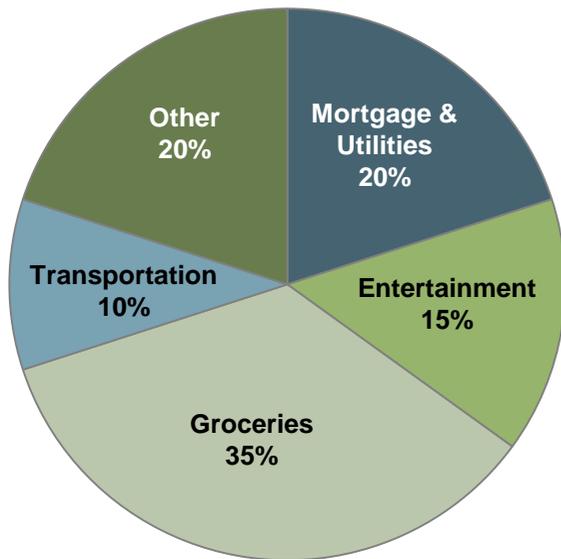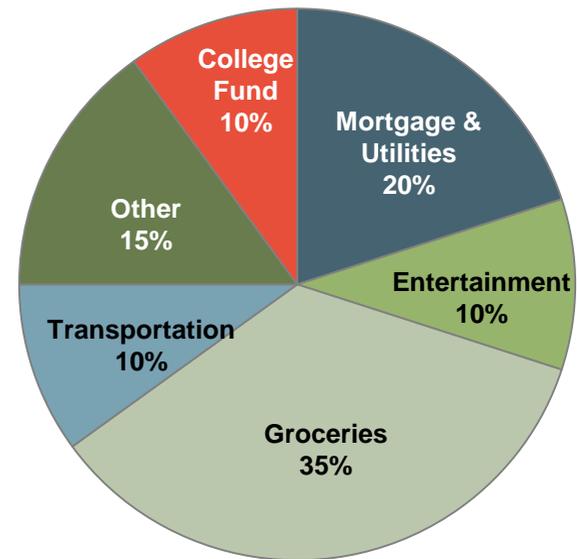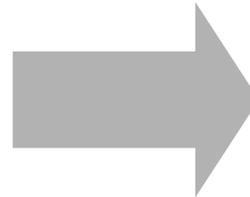
# Similar to a family budget, we must determine the tradeoffs necessary to invest in our priorities



EngageLCS is about dividing up our budget differently

We need to determine where to spend less and spend differently...

...in order to fund our instructional priorities

Business Services & Other
4.9%

22.0% Operations & Maintenance

52.5% Direct Instruction

7.8% Leadership

5.9%

Instruction Support & Professional Development

6.9%

Pupil Services & Enrichment

**Today**

Instructional priorities ~10%

??? 90%

Decision is how to split the current pieces to make room for the new priorities
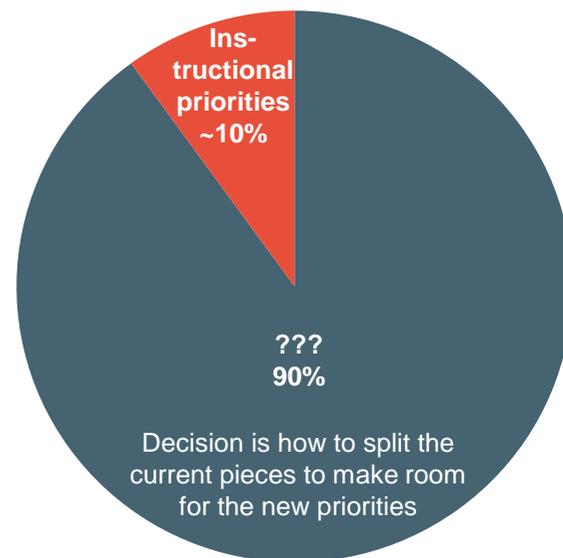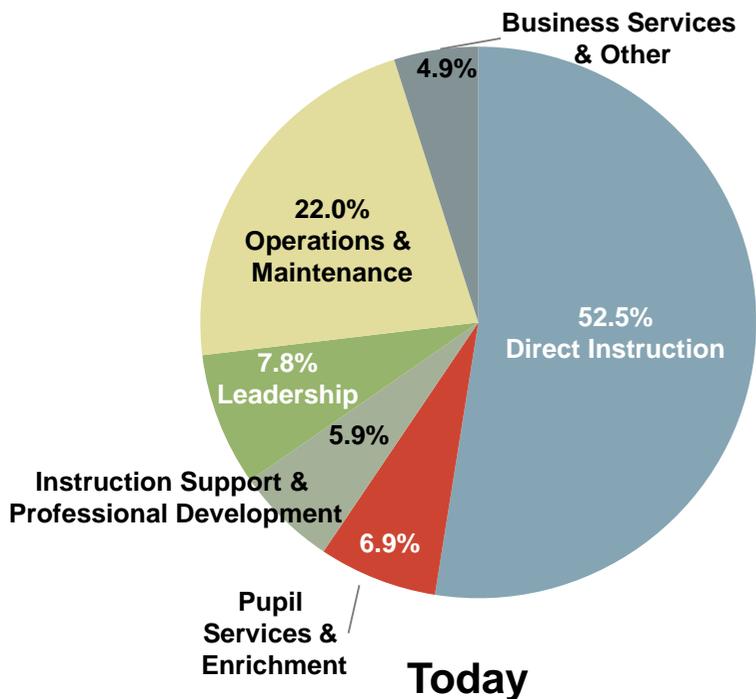
**3-5 yrs in the Future**

# What follows is a <u>preliminary</u> list of ideas for how LCS *might* divide our budget differently to fund our priorities

**The following pages list potential ways LCS could shift funds toward our priorities over the next 3 years**
- Formulated based on Resource Map data and analysis so far
- Collected from numerous internal and external stakeholders, including those who have posted ideas on Mindmixer (*as of Tuesday, October 8*)
- Ideas have been consolidated into common themes

**<u>These ideas are potential actions based on available data so far, not recommendations</u>**
- Remember, we anticipate narrowing this to a much shorter list of actions to take in the next 3-5 years

**We expect items to be added and deleted over the coming weeks based on:**
- Input from students, parents, teachers, school leaders, other staff, community members
- Further analysis of our current spending and resource allocation
- Additional research on other districts' practices
- Further research and discussion of the relative impact on students of different investments

**Ultimately, the district will choose to implement a subset of the ideas brought to the table**
- We are unable to pursue all of the viable ideas; we will prioritize opportunities to pursue based on a number of factors including projected student impact, timeline for change, and project amount of funding freed

**A critical part of EngageLCS is open, transparent dialogue with the LCS community**
- This is why we think it is important to share this information at this preliminary stage

# These ideas are sourced from many different stakeholders

**These ideas are not intended to represent the view of the district**

**Ideas have been collected through engagement with stakeholder in various ways**
- Mindmixer web community *(as of Tuesday, October 8)*
- Engagement with 200+ staff through discussions in working and advisory groups
- E-mails to 5,000+ employees
- News releases
- Web banners on school websites
- EngageLCS page created on District website
- Posted fliers with QR code linking to Mindmixer
- Town hall meetings with staff
- E-mails to 16,000+ parents and guardians
- Interviews with local print and broadcast news media

**In the spirit of transparency, all ideas collected are represented**
- While similar ideas have been consolidated into common themes . . .
- . . . Ideas have not been filtered out

# Purpose of the following pages is to:

1) **Share a comprehensive list of ideas collected**

2) **Invite feedback on the ideas**

3) **Share everything suggested, without vetting, qualifying, or assessing the ideas**

**Again, these are not recommendations. Ideas will be added and removed from this list as the process moves forward**

# Preliminary ideas collected from multiple stakeholders (I)

## Subject to further review and input

| Position/area | | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|---|
| **Compensation** | **Teacher compensation** | • Increase portion of salary linked to teacher evaluation and reduce portion of salary based on education/experience | • Rewarding and retaining our best teachers is an instructional priority |
| | **Staff and teacher payment scales** | • Decrease or freeze salaries or staffing levels for administrators, upper level support staff and board members | • Funnels funding to teachers and classroom, where instructional priorities are centered |
| **Central office** | **Central office HR/ finance staff** | • Reduce central office HR and finance staff | • New data, procurement and HR system will dramatically change HR and finance processes, eliminating many manual processes |
| | **Legal fees** | • Reduce legal fees through standardization (for example: do not require every contract to be reviewed by Legal team; if standard, use a fill-in-the-blank template) | • Legal fees are expensive, and most district contracts are standard |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

**Draft—for discussion only**

# Preliminary ideas collected from multiple stakeholders (II)

Subject to further review and input

| Position/area | | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|---|
| **Operational spending** | **Transportation** | • Change bell schedule to allow 6th- through 12th-graders to share buses and routes, then decrease from three to two tiers of bus routes (K-5, 6-12)<br><br>• Charge a surcharge to students who take bus | • Based on resource map data, transportation spending higher than peer districts<br>• Relatively low # of middle schoolers, with similar geographic footprint to HS, suggests shared routes may be feasible<br><br>• Transportation expense is significant compared to other areas<br>• Do not want to eliminate this helpful service, but need to figure out how to make it less costly |
| | **Custodians** | • Reduce number of custodial staff | • When compared to peer districts on a per-student basis, LCS has a relatively high number of custodians |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

Source: LCS data, ERS analysis, interviews and discussions with district staff, crowdsourced ideas from Mindmixer

**Draft—for discussion only**

# Preliminary ideas collected from multiple stakeholders (III)

Subject to further review and input

| Position/area | | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|---|
| **Operational spending (cont'd)** | **Maintenance** | • Optimize number and types of maintenance staff across district to spend most efficiently<br>• Better prioritization of maintenance projects that takes school staff input into account<br>• Consolidate lawn and maintenance operations by utilizing contractors | • Spending on maintenance and facilities staff higher than peer districts<br>• Some school-level maintenance projects could be better timed and prioritized<br>• Contracting lawn and maintenance operations would reduce the amount of equipment and staff needed |
| | **Operations** | • Decrease utilities spending (incl. decreasing staff hours) by using demand management process<br>• Utilize e-forms whenever possible | • LCS spending in this areas is higher than comparison districts by ~2%<br>• Using virtual forms will save on staff time and other resources |
| | **Materials and supplies** | • Stretch supply budgets by more aggressively recruiting online vendors | • Online vendors often have cheaper prices than some district-approved vendors; currently not a concrete process for getting them approved |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

Source: LCS data, ERS analysis, interviews and discussions with district staff, crowdsourced ideas from Mindmixer

**Draft—for discussion only**

# Preliminary ideas collected from multiple stakeholders (IV)

Subject to further review and input

| Position/area | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|
| **Professional development** | • Reduce the amount of non-coaching activities instructional coaches are assigned | • There are indications that a significant portion of instructional coach time may be spent on non-coaching activities |
| | • Reduce number of instructional coaches or change allocations | • Low teacher to coach ratio compared to other districts; instructional coaches clustered at the elementary level |
| | • Increase efficiency through better coordination among departments that plan, deliver programs | • Funding and strategy is spread across departments and is not coordinated |
| | • Better catalog (and eliminate redundant) digital professional development offerings | • Currently redundant software being used due; eliminate duplication |
| | • Offer a stipend to teachers who pursue independent professional development, decreasing spend on district-driven programs | • Rewards self-motivated personnel without taking away from teacher time spent in the classroom |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

Source: LCS data, ERS analysis, interviews and discussions with district staff, crowdsourced ideas from Mindmixer

# Preliminary ideas collected from multiple stakeholders (V)

Subject to further review and input

| Position/area | | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|---|
| **Staffing** | **Secretarial & clerical staff** | • Reduce number of administrative assistants, secretarial and clerical staff | • Compared to similarly-funded peer districts, Lake has higher staffing levels for these positions |
| | **Guidance counselors** | • Reduce total number of guidance counselors | • Based on resource map data, LCS has more counselors per student compared to the median number of counselors for similarly-funded peer districts |
| | **Administrative staffing** | • Decrease # of school-based non-load-bearing administrative staff such as assistant principals in favor of more load-bearing staff | • Funds are more effective when spent on staff working hands-on with students rather than administrators |
| | **High school schedule** | • Move from current block schedule to a straight schedule of 7 periods | • Current schedule requires more resources to administer; it also under-utilizes our best teachers and does not align to testing windows |
| | **Class size** | • Selectively increase class size where below state cap | • Maximize the students reached by our best teachers; current average student: teacher ratio may be below state cap in some schools |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

Source: LCS data, ERS analysis, interviews and discussions with district staff, crowdsourced ideas from Mindmixer

**Draft—for discussion only**

# Preliminary ideas collected from multiple stakeholders (VI)

## Subject to further review and input

| Position/area | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|
| **Overall** | | |
| **Exceptional students (ESE)** | • Put processes in place to ensure all available funding received | • ESE funds district receives do not always align with the level of service provided to students |
| | • Using appropriate inclusion model, educate special needs students within regular classes, potentially requiring fewer instructors overall | • Inclusion models allow ESE staff to reach more students in need of remediation |
| **Assessments** | • Decrease funding to assessment initiatives | • Interferes with classroom instruction, with lower return on investment than teaching time |
| **Personalized learning** | • Increase use of technology to support more personalized learning experience for students | • New technology provides the potential for learning to better align with individual students' needs and interests and may be more cost-effective |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

**Draft—for discussion only**

# Preliminary ideas collected from multiple stakeholders (VII)

Subject to further review and input

| | Position/area | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|---|
| **Overall (cont'd)** | **School day length** | • Add 2 hours to the school day Tues-Fri, and move to a 4-day week for students | • Could save on operational expenses (e.g., utilities, transportation) while using open time for professional development and non-academic activities (sports/clubs/etc.) |
| | **Federal title/ IDEA funding** | • Utilize comprehensive budgeting process that includes allocating general fund, grant and federal/state entitlement $ at the same time | • Many overlaps between federal/state funding spending categories and general fund spending categories, but separate budgeting processes<br>• Combining processes could help identify and eliminate redundant spend, and better maximize resource use |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

**Draft—for discussion only**

# Other stakeholder input: Collected ideas on areas for additional funding (I)

| Position/area | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|
| **School staffing** | • Increase # of teacher aides in elementary (particularly for reading) | • Class load on elementary teachers does not allow for sufficient personalized intervention |
| **Class size** | • Selectively decrease class size for some special non-core courses | • Some current special non-core class sizes create less than ideal environments for students |
| **Elementary schedule** | • Implement departmentalization in 4th and 5th grades | • Encourages deeper, more thorough lesson planning and instructional delivery<br>• Better prepares students for middle school |
| **Teacher planning time** | • Increase amount of time during school day for planning, collaboration by reducing non-teaching commitments (fewer meetings during planning time, true half-day Weds.) | • Collaborative planning leads to higher quality lesson plans and differentiated instruction delivery<br>• Difficult to effectively plan collaboratively outside of normal school hours |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

**Draft—for discussion only**

# Other stakeholder input: Collected ideas on areas for additional funding (II)

| Position/area | Idea | Summary of reasoning provided by contributor(s) |
|---|---|---|
| **Non-core courses** | • Increase arts programming in schools | • Some research-based evidence of correlations between arts education and student achievement<br>• Provides positive outlet for student creativity |
| **English language learners** | • Increase funding so that ELL students can have a full teacher, rather than an assistant | • ELL is a growing high needs population with low achievement rates |
| **Career and technical education (CTE)** | • Increase funding for alternate academic programming for students not on the college path | • Not all LCS students are college-bound; the current requirements may increase dropout rates by overwhelming these students |

Note: Rationale for spending change provided by contributor of idea and does not necessarily reflect district ideas or policies

Source: Crowdsourced ideas from Mindmixer

**Draft—for discussion only**

# What you can do: Please continue to share your ideas for how we can fund our priorities and spend differently

**Watch for additional data and ideas to be published on Mindmixer October 24**

- Refined list of opportunities based on
    - Collected community ideas
    - Further research on feasibility of options for spending less and spending differently
- Additional data on LCS resource use

**Continue sharing ideas on Mindmixer (https://EngageLCS.mindmixer.com)**

- Mindmixer will be open for your comments until November 4, 2013
- Please continue to comment on any part of the information that has been released

# What we will do: We have and will continue to reach out to the community through multiple avenues

- Mindmixer web community
- Discussions with 200+ staff and community members as part of EngageLCS working and advisory groups
- E-mails to 5,000+ employees
- News releases
- Web banners on school websites
- EngageLCS page created on District website
- Posted fliers with QR code linking to mindmixer
- Town hall meetings with staff
- E-mails to 16,000+ parents and guardians
- Interviews with local print and broadcast news media

# Join the conversation

**Please review the data on our current spending**

**and submit your ideas for how to redistribute the LCS "family budget" to fund our core instructional priorities**

# http://EngageLCS.mindmixer.com