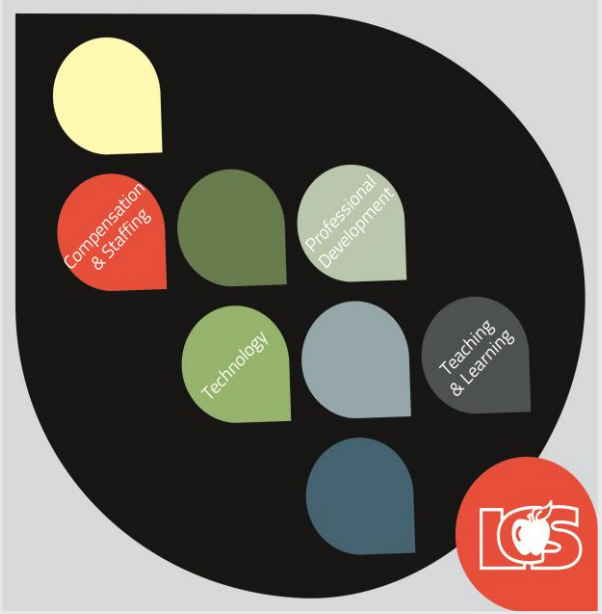
ENGAGELCS

Instructional Priorities and Resource Use:
Second and final part of resource use analysis

Released: October 24, 2013

ERS
Education Resource Strategies

BCG
The Boston Consulting Group

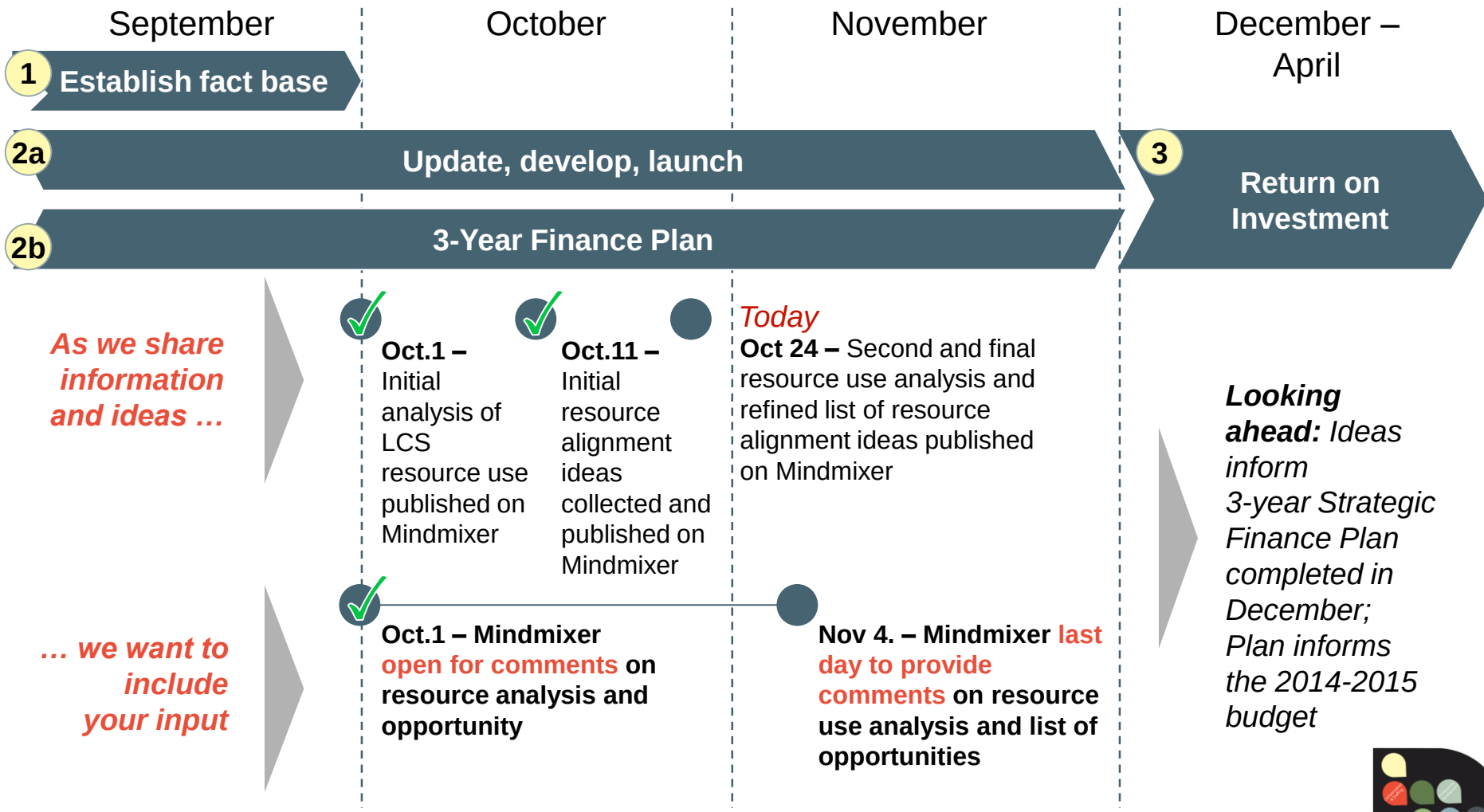


Recall: We are in the second phase of the 18-month EngageLCS initiative

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 • 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.

Today we will share more data on resource use and potential 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

Create a talent development pipeline for teachers and leaders

Professional Development

Implement a coaching framework for teacher and principal induction and instructional coaches

Technology & Personalized Learning

Establish personalized learning through digital support for teacher/leader professional development and student instructional delivery

Innovation in Teaching & Learning

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

Innovation in Teaching & Learning

The need

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?

The investment: Where our dollars will go

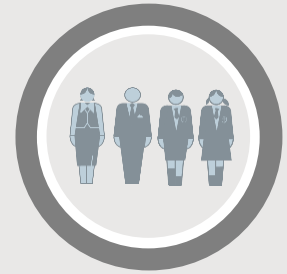
- Investment in promising and proven instructional programs
- Standardized, centralized process for evaluating innovative programs and determining which to implement, based on weighing costs against projected return (e.g., academic outcomes)

The data released in this phase will cover two central topics: school equity and in-school resource use

Section 1: School equity

Covers how funding is allocated among students and schools in Lake County based on various characteristics

Section 2: In-school resource use



Shows how in-school resources, such as teachers and school time, are used in Lake County schools

Questions explored during school equity and in-school resource use analyses

	Area	Questions
1 School equity	**Equity by student type**	• How do funding levels vary by student type?
	Equity across schools	• How do funding levels vary for schools teaching the same grade levels?
	School size	• How large (in terms of number of students) are Lake County schools relative to other districts?
	School level	• How do funding levels compare between elementary, middle and high schools?
2 In-school resource use	**Class size**	• How large are our class sizes? • How does class size vary by school, student type, and subject?
	Class hours	• On average, how much time is devoted to each subject area?
	Student proficiency	• How do class size and time spent in class vary by student proficiency level?
	Teacher load	• How many students are teachers responsible for on average?

The information that follows is one step in a process to identify and realign resources

The data presented here is part of an ongoing study of our use of resources

- The analysis is meant to shine a light on how we are using resources today
- To the extent possible, the data is offered without interpretation

In some cases, the data presents LCS spending alongside that of comparison districts

- This comparison does not represent a goal, but an indicator to help us put LCS's resource use in context

We invite you to provide reactions, questions, and ideas about the data

- A critical part of EngageLCS is being transparent in providing information . . .
- . . . but also getting your feedback and ideas on the information that is shared

This dialogue is one step toward developing ideas to realign resources

- EngageLCS will align dollars to our priorities in order to increase student achievement
- To do so, we must find areas where we are not spending money smartly today and align resources from these areas toward our priorities
- This analysis of current spending represents a step in the process: it sheds light on our spending to help us determine where to seek more information

This data does not provide answers, but rather where we might ask more questions about our resource use

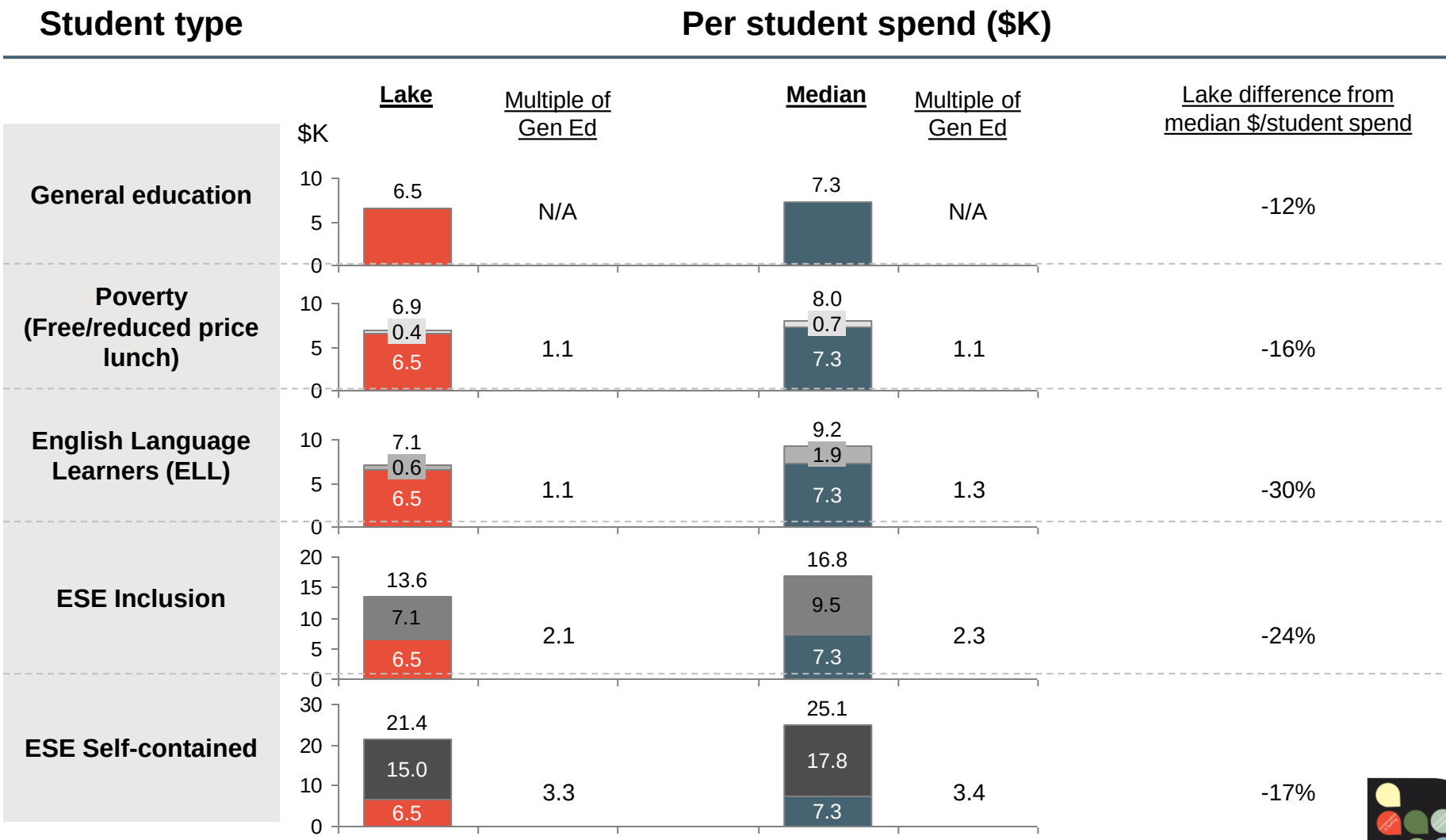
School equity analysis uses 13 comparison districts

Due to varying availability and relevance of data across districts, not every comparison district is included in every analysis that follows

District	Enrollment[1]	$ per pupil spending[2]
Charlotte, NC	137,294	7,925
Lake County, FL	35,754	7,996
Knox County, TN	57,918	8,198
Austin, TX	86,512	9,029
Fulton County, GA	88,309	9,116
Duval County, FL	120,818	9,178
Marietta, GA	7,833	10,841
Denver, CO	68,661	10,882
Prince George's County, MD[3]	123,629	11,046
Philadelphia, PA	166,233	12,553
Baltimore, MD	83,800	13,754
Cleveland, OH	40,072	14,063
District of Columbia	44,107	14,993
Newark, NJ	37,616	18,332

1. Figure excludes charter and adult education student 2. Refers to per pupil expenditure from PK-12 operating budget only; expenditure adjusted for geography (cost of living) and year to compare to Lake '12-'13 dollars 3. Refers to PG County '09-'10 dataset; previously shared analysis shared multiple years of Prince George's data. Note: Some of above school districts have letter or number grades based on state methodology; however, meaningful comparison across states not available and thus district grades are not included with this data; Source: ERS comparable districts data, LCS data, ERS analysis

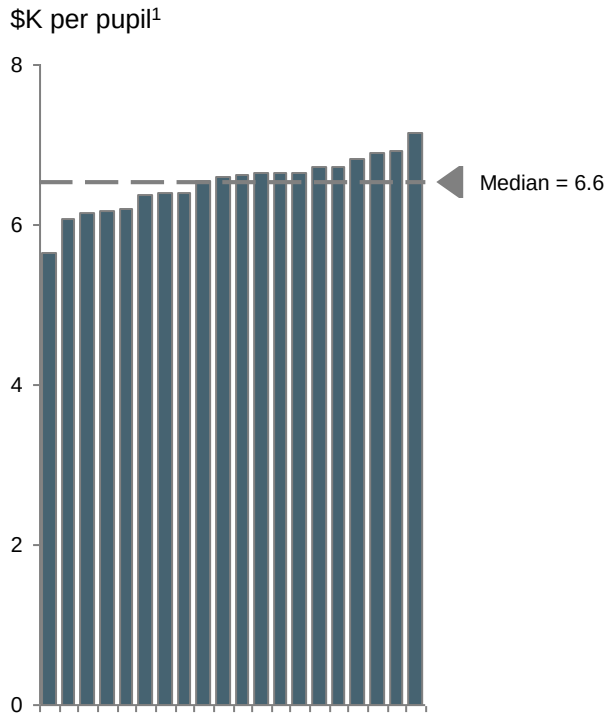
LCS and median comparison district per student spending by student type



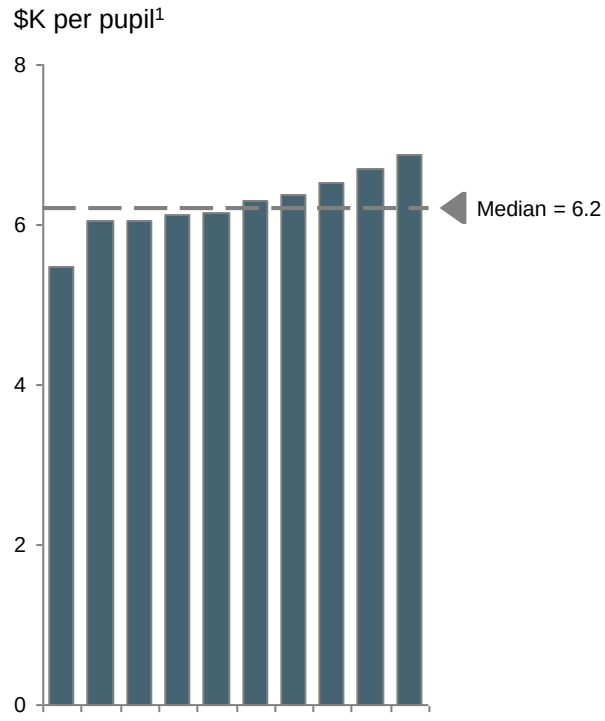
Note: Districts used for median calculation: Knox County, Fulton County, Charlotte, Austin, Duval County, Prince George's County ('09-'10), Denver, Marietta
Source: LCS data, ERS analysis

Funding within and across LCS elementary, middle and high schools

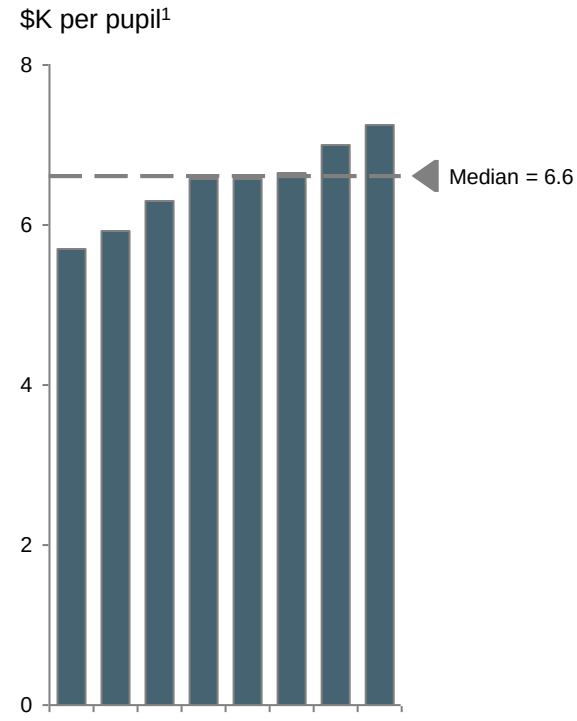
Elementary Schools



Middle Schools

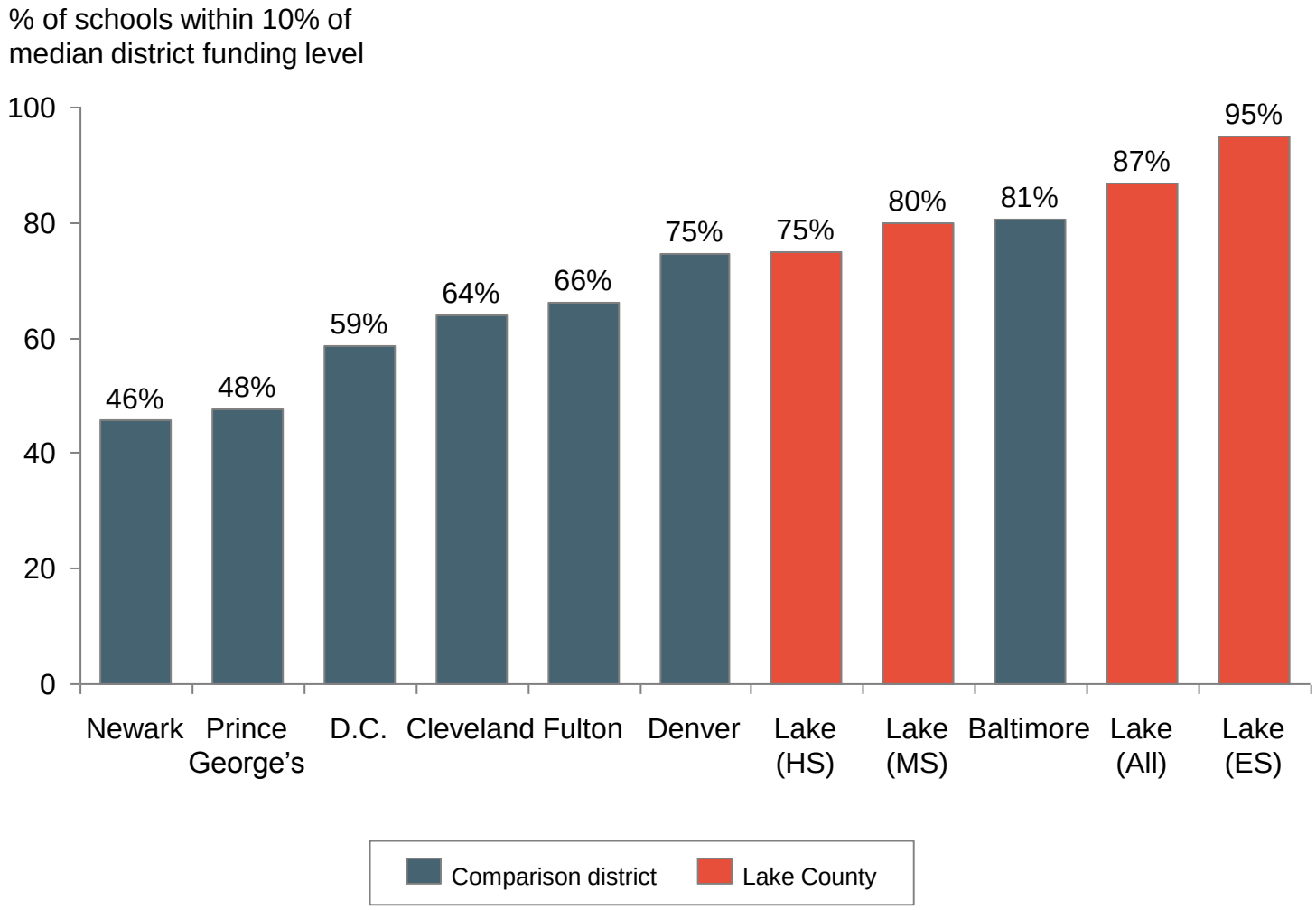


High Schools



1. $ per pupil weighted to control for varying proportions of student populations across schools; as a result, for valid comparison, total per pupil spend appears lower than actual spending. Note: The following are excluded from this analysis: Lake Academy; Eustis, Lake Academy; Leesburg, Lake Hills School, Rimes Early Learn/Lit Center, Acer School, Alternative Discipline Program, Lake County Virtual Franchise, Lake Virtual Instructional Program
Source: LCS data, ERS analysis

Across-school spending for LCS and comparison districts



Source: LCS data, ERS analysis

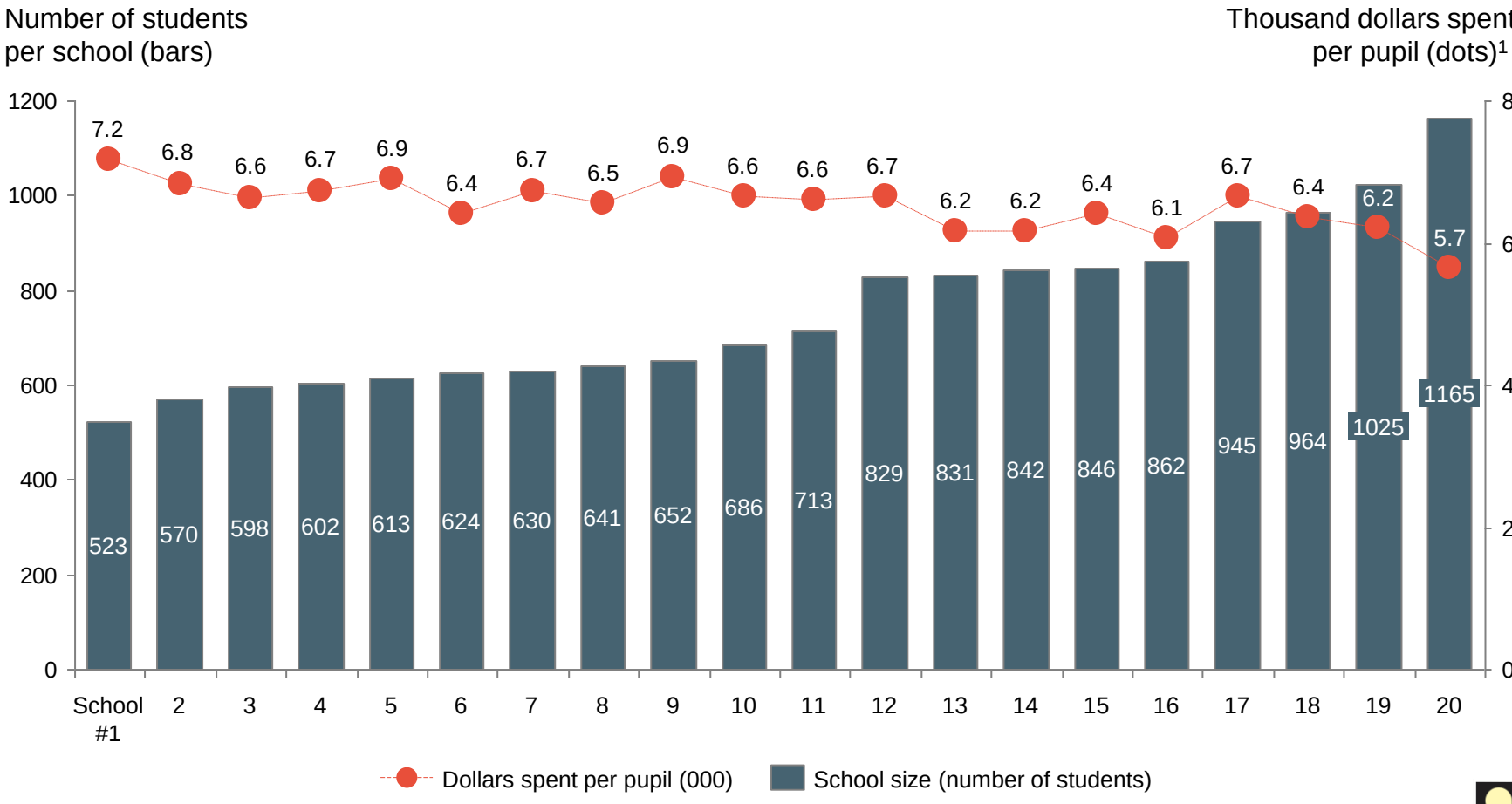
Lake and comparison district school sizes (# of students)

% of district Elementary Schools in each size range					
District	<200	200–349	350–499	500–999	1000+
Lake	**0%**	**0%**	**0%**	**90%**	**10%**
Charlotte	1%	4%	17%	64%	14%
Duval	2%	14%	32%	42%	10%
Denver	2%	16%	34%	48%	0%
Prince George's County	1%	29%	39%	30%	1%
Philadelphia	0%	19%	38%	38%	5%
Atlanta	3%	33%	47%	17%	0%
Boston	19%	39%	22%	20%	0%
Washington D.C.	7%	56%	29%	7%	0%
Rochester	5%	28%	33%	33%	3%
Newark	14%	25%	27%	29%	5%

% of district Middle and High schools in each size range					
District	<200	200–349	350–499	500–999	1000+
Lake	**0%**	**0%**	**0%**	**33%**	**67%**
Charlotte	0%	2%	2%	35%	61%
Duval	0%	0%	5%	30%	66%
Denver	0%	12%	8%	46%	35%
Prince George's County	0%	0%	0%	54%	46%
Philadelphia	3%	21%	15%	35%	27%
Atlanta	11%	7%	15%	37%	30%
Boston	4%	31%	27%	27%	12%
Washington D.C.	4%	32%	18%	36%	11%
Rochester	5%	19%	33%	19%	24%
Newark	0%	25%	19%	44%	13%

Note: The following schools are excluded from this analysis: Lake Academy – Eustis, Lake Academy, Leesburg, Lake Hills School, Rimes Early Learn/Lit Center, Acer School, Alternative Discipline Program, Lake County Virtual Franchise, Lake Virtual Instructional Program
Source: LCS data, ERS analysis

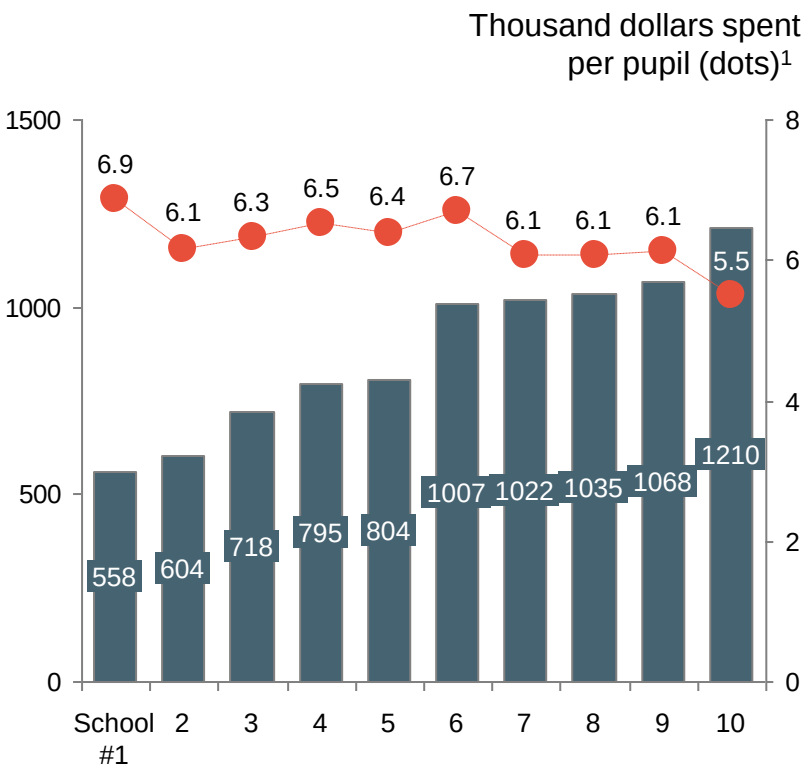
Elementary school size versus $ per pupil



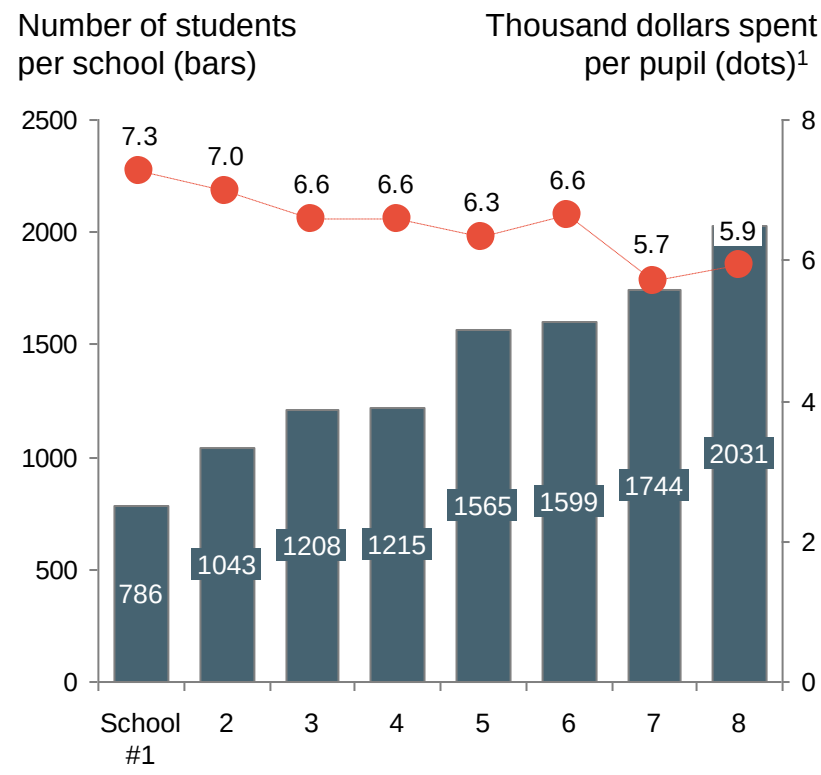
1. $ per pupil weighted to control for varying proportions of student populations across schools; as a result; for valid comparison, total per pupil spend appears lower than actual spending. Note: The following are excluded from this analysis: Lake Academy – Eustis, Lake Academy – Leesburg, Lake Hills School, Rimes Early Learn/Lit Center, Acer School, Alternative Discipline Program, Lake County Virtual Franchise, Lake Virtual Instructional Program.
Source: LCS data, ERS analysis

Middle and high school size (# of students) versus $ per pupil

Middle School



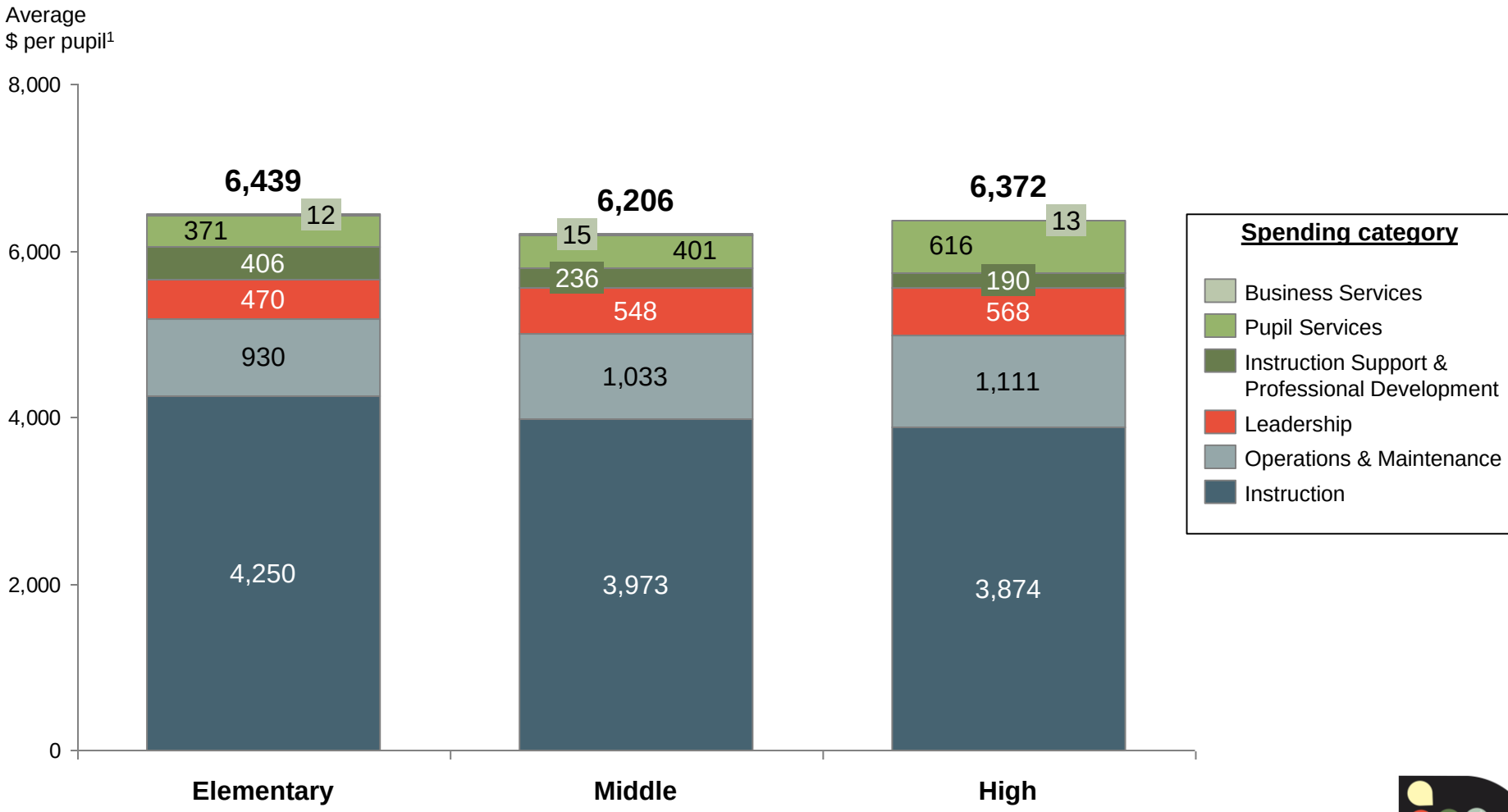
High School



Dollars spent per pupil (000) School size (number of students)

1. $ per pupil weighted to control for varying proportions of student populations across schools; as a result; for valid comparison, total per pupil spend appears lower than actual
Source: LCS data, ERS analysis

LCS per student funding levels by school level and spending category



1. Represents average of all schools included in sample; $ per pupil weighted to control for varying proportions of student populations across schools; as a result, for valid comparison, total per pupil spend appears lower than actual spending. Source: LCS data, ERS analysis

Summary of findings from school equity analysis

Equity by student type	• Compared to median of other districts, LCS spends less on all student types • Compared to median, LCS spends fewer additional dollars (above GenEd base) on special student types
Equity across schools	• Very little variation in funding to individual schools (~90% of schools within 10% of median funding level) • Similar funding across school levels
School size	• LCS has large schools (e.g., # of students per building) compared to other districts • Large size more pronounced at elementary level compared to comparable school districts • After adjusting for student population, variation in school-level funding mostly explained by school size
School level	• Median funding for elementary and high schools is $6.6K per pupil; median funding for middle schools is $6.2K per pupil • Instructional support and professional development spend is higher in lower grades

Source: LCS data, ERS analysis, BCG analysis

Context for Section 2: in-school resource use

The data in this section provides a snapshot of how Lake County Schools currently uses its in-school resources

Unlike Section 1, there will not be a comparison between Lake County Schools and other comparison districts

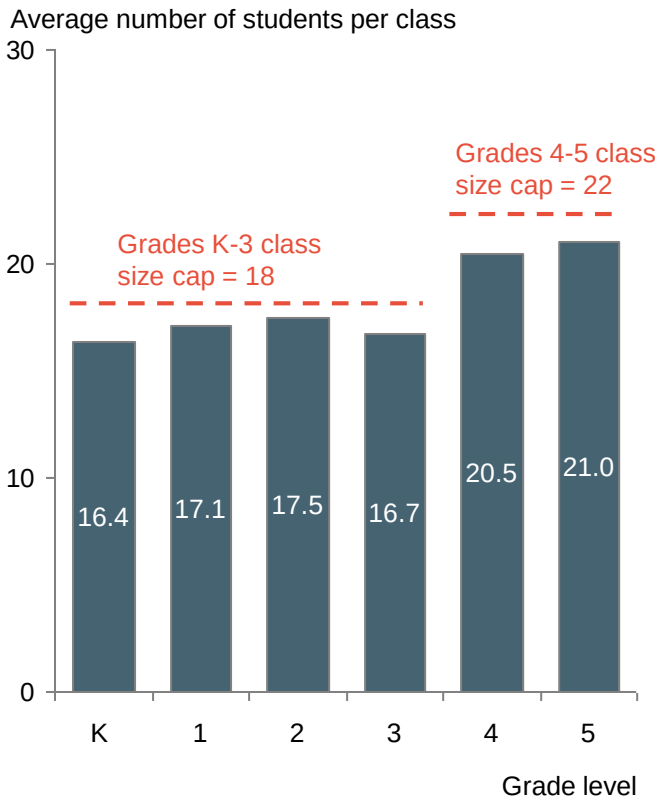
- Goal of this section is to initiate a conversation on Lake County's in-school investment priorities

Data will be shown for individual schools in Lake County throughout

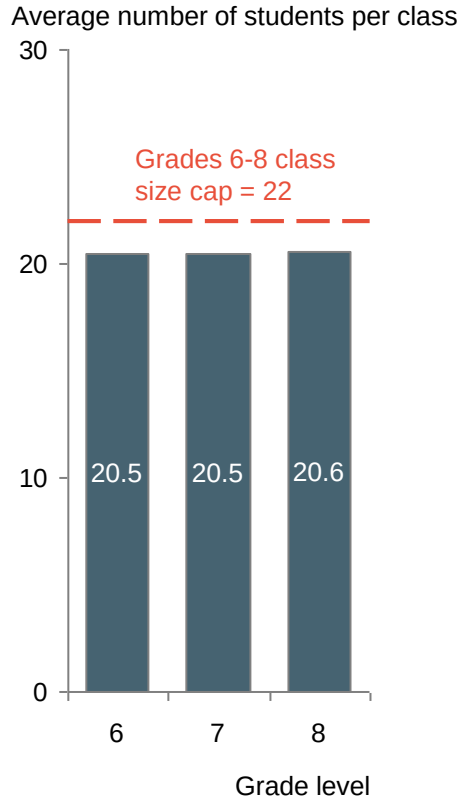
- Purpose is not to single out any particular school, but to identify best practices within Lake County schools that can be replicated

Core class size by grade level

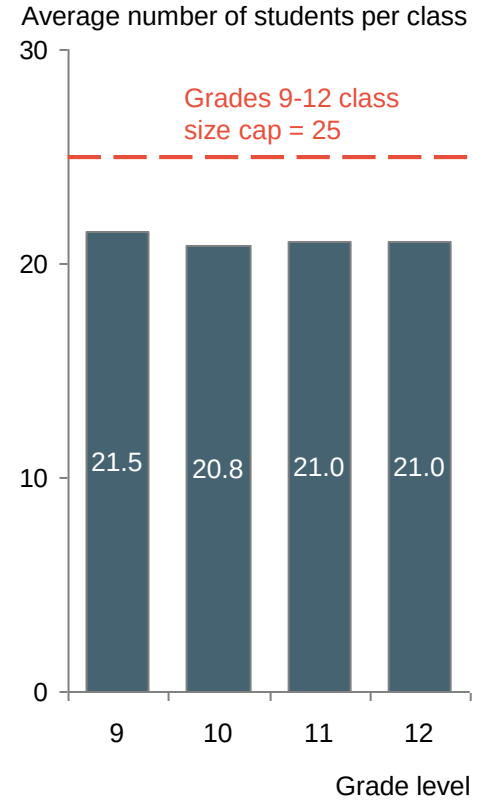
Elementary School[1]



Middle School[2]



High School[2]

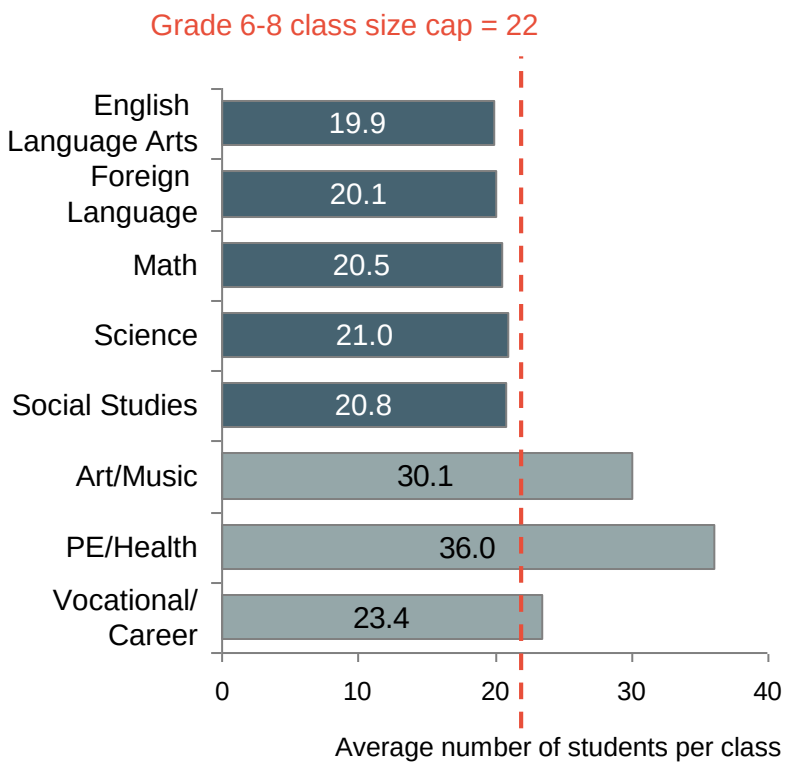


- Note that middle and high school averages include foreign language, which is a core class but not subject to the class size cap.
- Excluding foreign language would not materially impact middle school class size averages, but would slightly decrease high school averages.

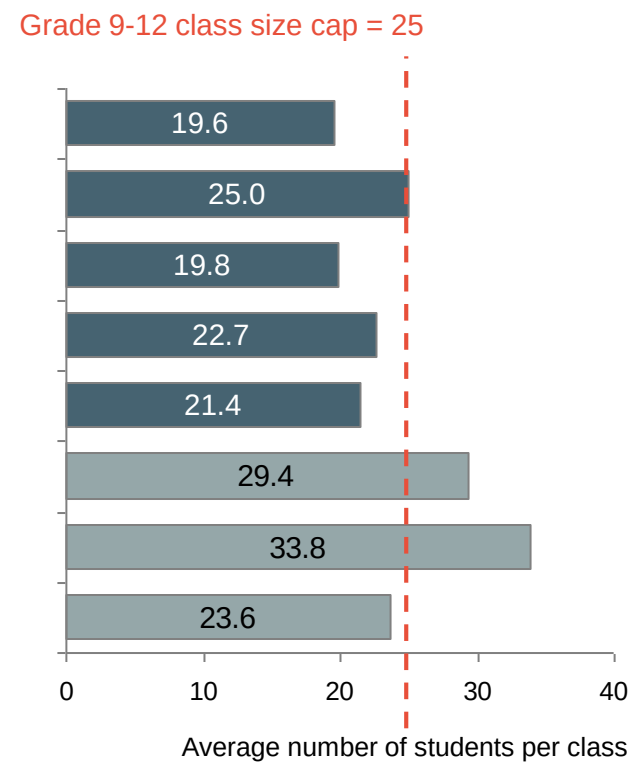
1. All elementary school classes are considered to be core; excludes grade school classes with >50% share of special education students 2. Middle and high school core classes include Math, Science, Social Studies, English / Language Arts, and Foreign Language. Foreign Language classes do not face state class size caps, even though they are legally defined as core classes
Note: Elementary school classes with 50+% ESE are excluded; Lake Academy and Lake Hills schools have been excluded from MS and HS estimates
Source: LCS data, ERS analysis

Middle and high school class size by subject

Middle school class size by subject

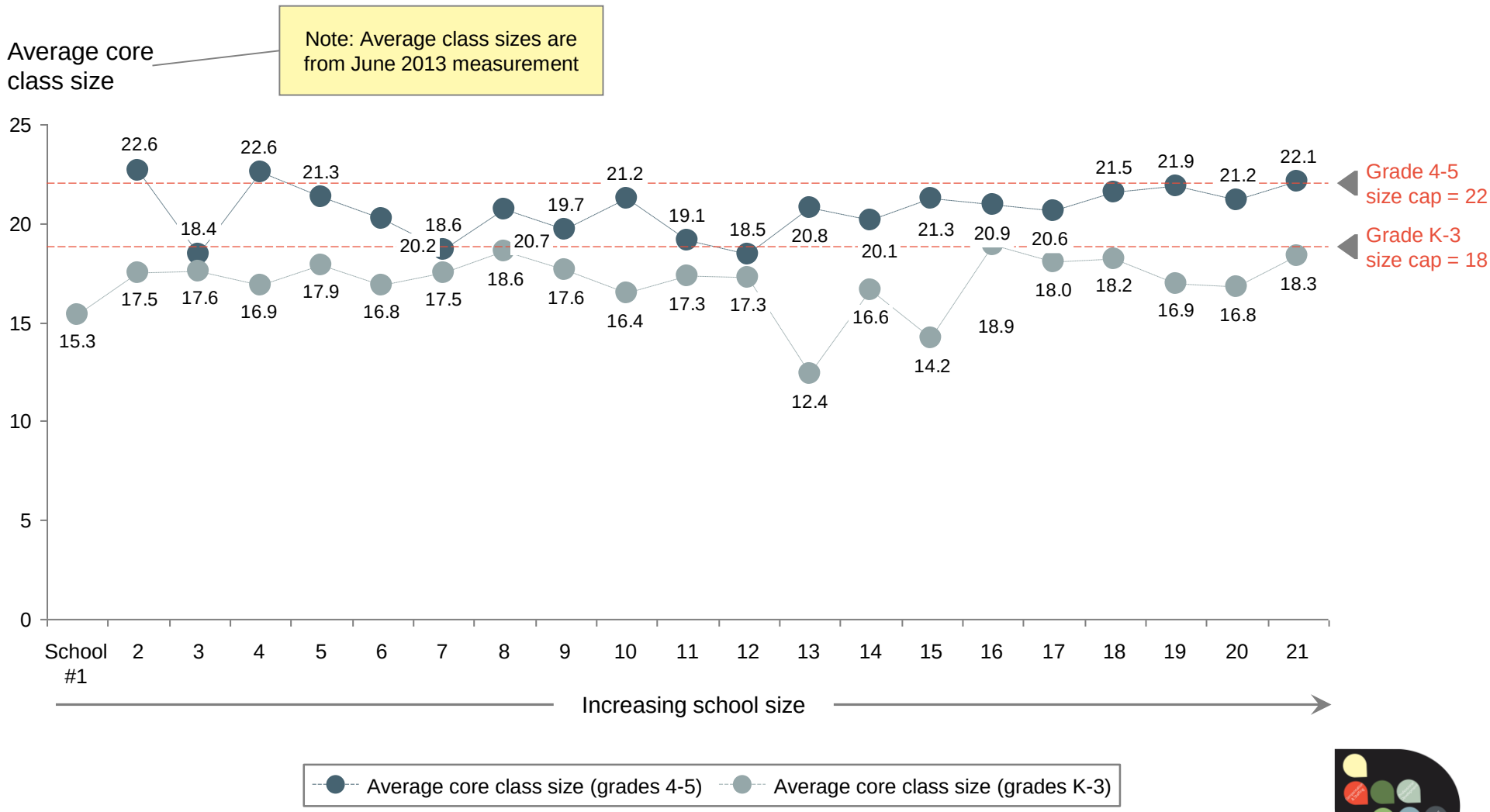


High school class size by subject



Note: Excludes other non-core classes, such as ROTC, and academic and skills support courses; Lake Academy and Lake Hills schools have been excluded from MS and HS estimates
Source: LCS data, ERS analysis

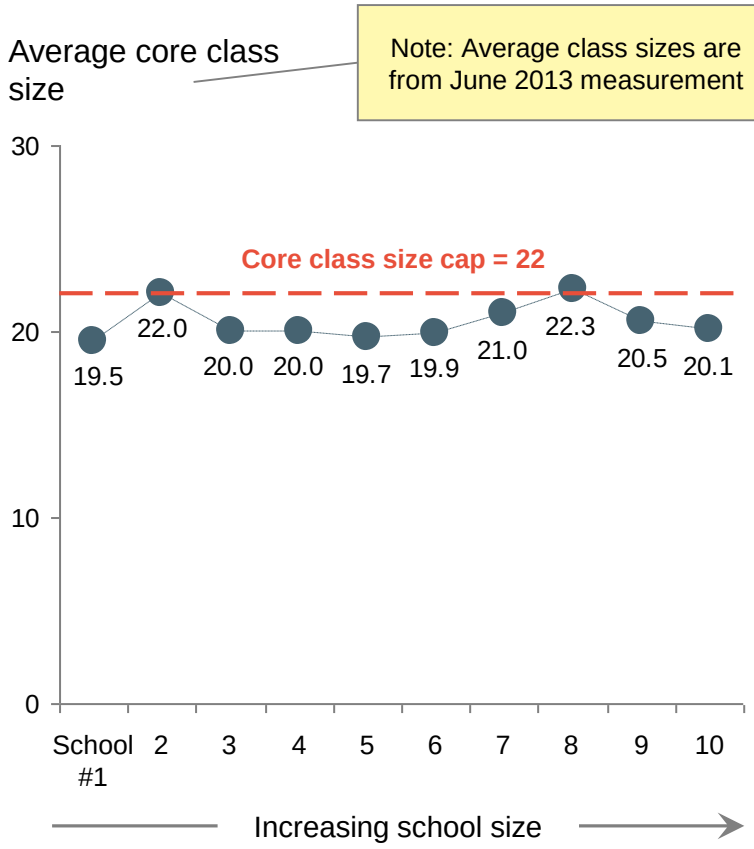
Elementary core class size by school and school size



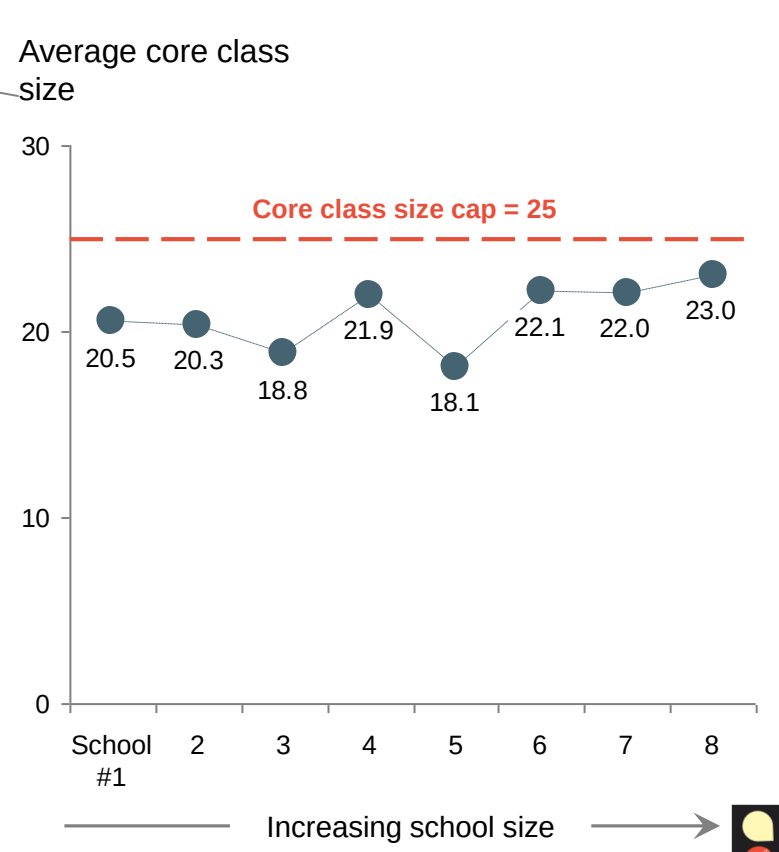
Note: All elementary school classes are considered to be core; excludes grade school classes with >50% share of special education students; Elementary school classes with 50+% ESE are excluded; schools receive a three-student buffer in K-3 and a five-student buffer in 4-5 after class size counts are taken in October
Source: LCS data, ERS analysis

Average middle and high school core class size by school and school size

Middle School



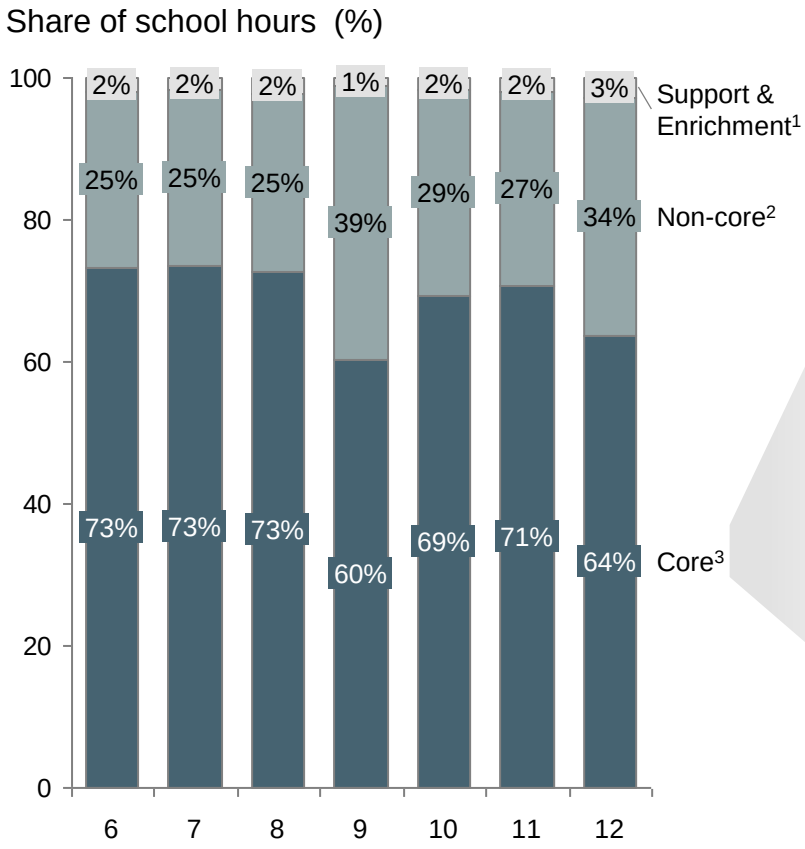
High School



Note: Middle and high school core classes include Math, Science, Social Studies, English / Language Arts, and Foreign Language. Foreign Language classes do not face state class size caps, even though they are legally defined as core classes; Lake Academy and Lake Hills schools have been excluded from MS and HS estimates
Source: LCS data, ERS analysis

Middle and high school student school hours by subject

Breakdown of school hours by subject category



Breakdown of school hours by core subject

Core Subject	Grade level						
	6	7	8	9	10	11	12
Math	17%	17%	17%	17%	16%	14%	15%
English Lang. Arts	23%	23%	22%	17%	18%	20%	18%
Science	17%	17%	17%	17%	17%	15%	7%
Social Studies	16%	16%	16%	7%	14%	16%	18%
Foreign Language	<1%	<1%	<1%	2%	4%	6%	10%
Total	**73%**	**73%**	**73%**	**60%**	**69%**	**71%**	**64%**

Note: English / Language Arts school hour mandate in Middle School, which helps explain high school drop in ELA time

1. Support & Enrichment classes include Academic Support and Life Skills Support 2. Non-core classes include Art/Music, Physical Education/Health, Vocational/Career, and ROTC 3. Foreign Language included as part of the core subject category, given the fact that it is legally defined as a core class, even though it is not subject to class size caps
Note: school hour percentages represent an average of the amount of time spent in a subject, weighted by the percentage of students spending each amount of time in the subject; Lake Academy and Lake Hills schools have been excluded from MS and HS estimates; Source: LCS data, ERS analysis

English and Math class hours by student proficiency level

Average % of school hours spent on English / Language Arts class, by proficiency level							
Proficiency level	**Grade level**						
	6	**7**	**8**	**9**	**10**	**11**	**12**
Advanced	19%	17%	17%	12%	13%	14%	14%
Above proficient	19%	18%	18%	13%	14%	14%	15%
Proficient	23%	22%	21%	16%	16%	16%	16%
Basic	28%	29%	28%	21%	22%	22%	16%
Below basic	35%	34%	35%	26%	28%	29%	24%

Average % of school hours spent on Math class, by proficiency level							
Proficiency level	**Grade level**						
	6	**7**	**8**	**9**	**10**	**11**	**12**
Advanced	16%	17%	16%	13%	13%	16%	14%
Above proficient	16%	17%	16%	14%	13%	10%	13%
Proficient	16%	17%	17%	16%	16%	18%	15%
Basic	17%	17%	17%	20%	19%	15%	14%
Below basic	18%	17%	17%	24%	21%	14%	16%

Note: proficiency levels based on scores from the FCAT; Lake Academy and Lake Hills schools have been excluded from MS and HS estimates
Source: LCS data, ERS analysis

English and Math class size by student proficiency level

English/Language Arts							
Proficiency level	**Grade level**						
	6	**7**	**8**	**9**	**10**	**11**	**12**
Advanced	21	21	21	23	24	22	23
Above proficient	21	21	21	23	23	22	23
Proficient	20	20	21	22	22	21	22
Basic	20	20	20	21	20	20	22
Below basic	19	20	19	20	20	19	20

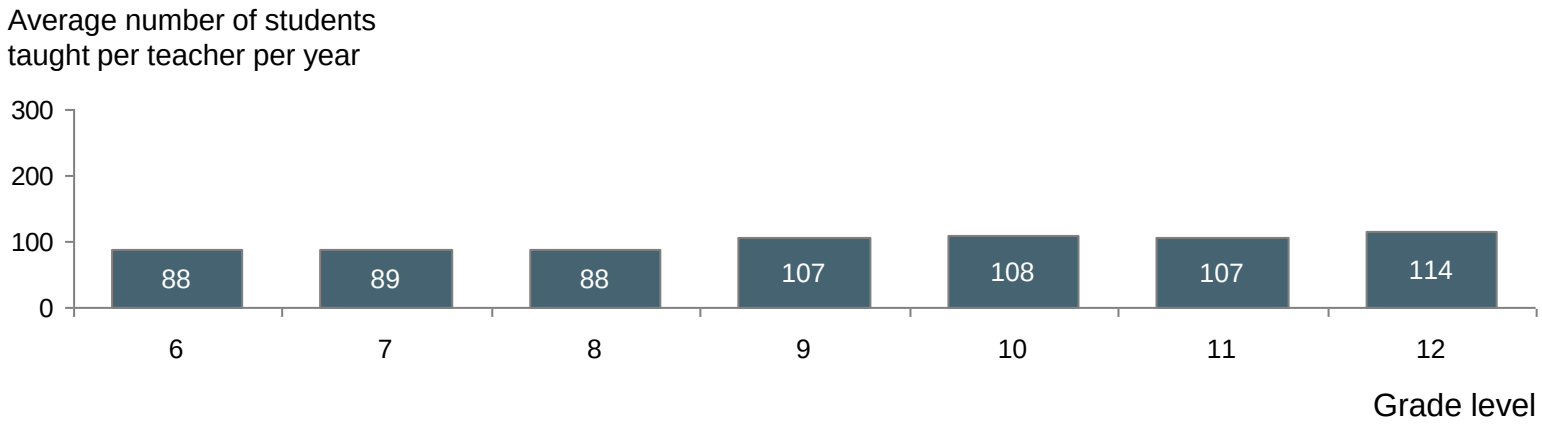
Math							
Proficiency level	**Grade level**						
	6	**7**	**8**	**9**	**10**	**11**	**12**
Advanced	21	21	21	23	22	25	26
Above proficient	21	21	22	22	22	23	24
Proficient	21	21	21	22	21	23	24
Basic	21	21	21	21	21	22	24
Below basic	21	20	20	21	20	22	23

Note that these average class sizes are higher than the overall averages for English and Math class because they are calculated differently; the class sizes in this slide are based on taking the average of the class size experienced by each student in a given proficiency level, which causes an upward bias because larger classes will be implicitly weighted higher than smaller classes

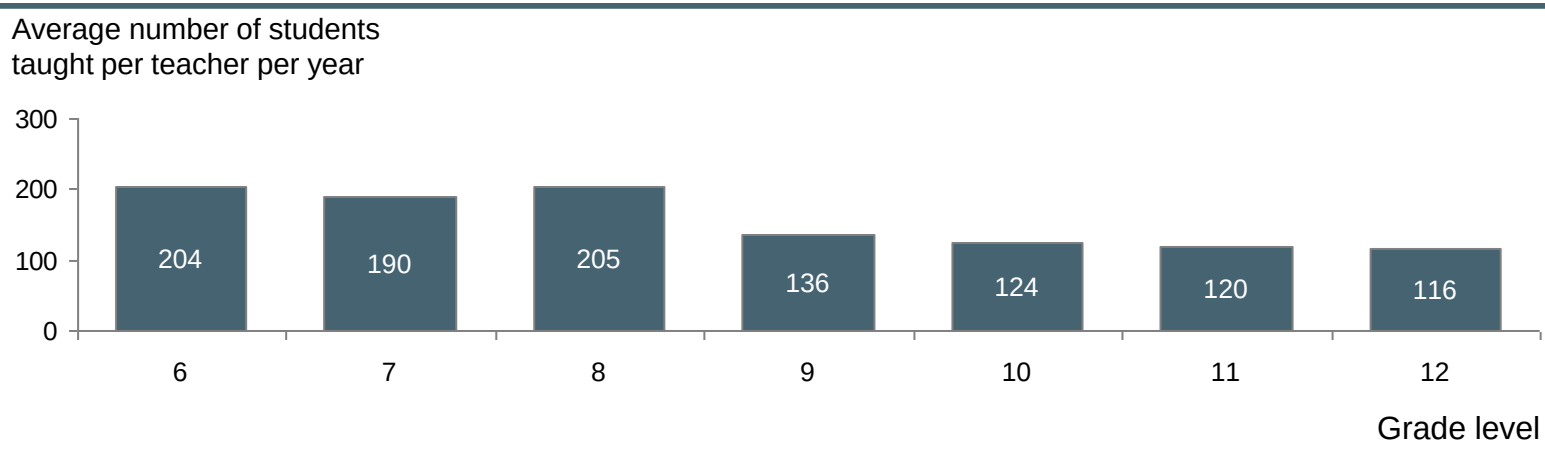
Note: proficiency levels based on scores from the FCAT; Lake Academy and Lake Hills schools have been excluded from MS and HS estimates
Source: LCS data, ERS analysis

Middle and high school annual teacher load by subject type

Core subjects[1]



Non-core subjects



1. Middle and high school core classes include Math, Science, Social Studies, English / Language Arts, and Foreign Language. Foreign Language classes do not face state class size caps, even though they are legally defined as core classes
Note: Lake Academy and Lake Hills schools have been excluded from MS and HS estimates
Source: LCS data, ERS analysis

Summary of findings for in-school resource use analysis

Class size	• Most elementary and middle school core class sizes are near caps • Larger gap between average core class size and cap in high school • Non-core classes are significantly larger than core classes
Class time	• Class hours appear to be allocated effectively between core and non-core classes, and within core subjects
Student proficiency	• Little class size difference based on student proficiency levels • Struggling students receive more class time in English/Language Arts across grade levels, and in Math for grades 9-10
Teacher load	• Teacher loads are moderate across middle and high school, with core teachers responsible for approximately 90-120 students annually on average

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

Continue sharing ideas on Mindmixer

- Mindmixer will be open for your ideas for the upcoming Strategic Finance Plan until November 4, 2013 . . .
- . . . However, dialogue on the site will continue to be a vital input into district decisions going forward
- Please continue to comment on any part of the information that has been released

http://EngageLCS.mindmixer.com

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