Beaverton School District Multiyear Finance Plan

2014 - 2019

BEAVERTON SCHOOL DISTRICT

WE

Version: Mon. Nov 23

Table of Contents

BEAVERTON SCHOOL DISTRICT

Introduction

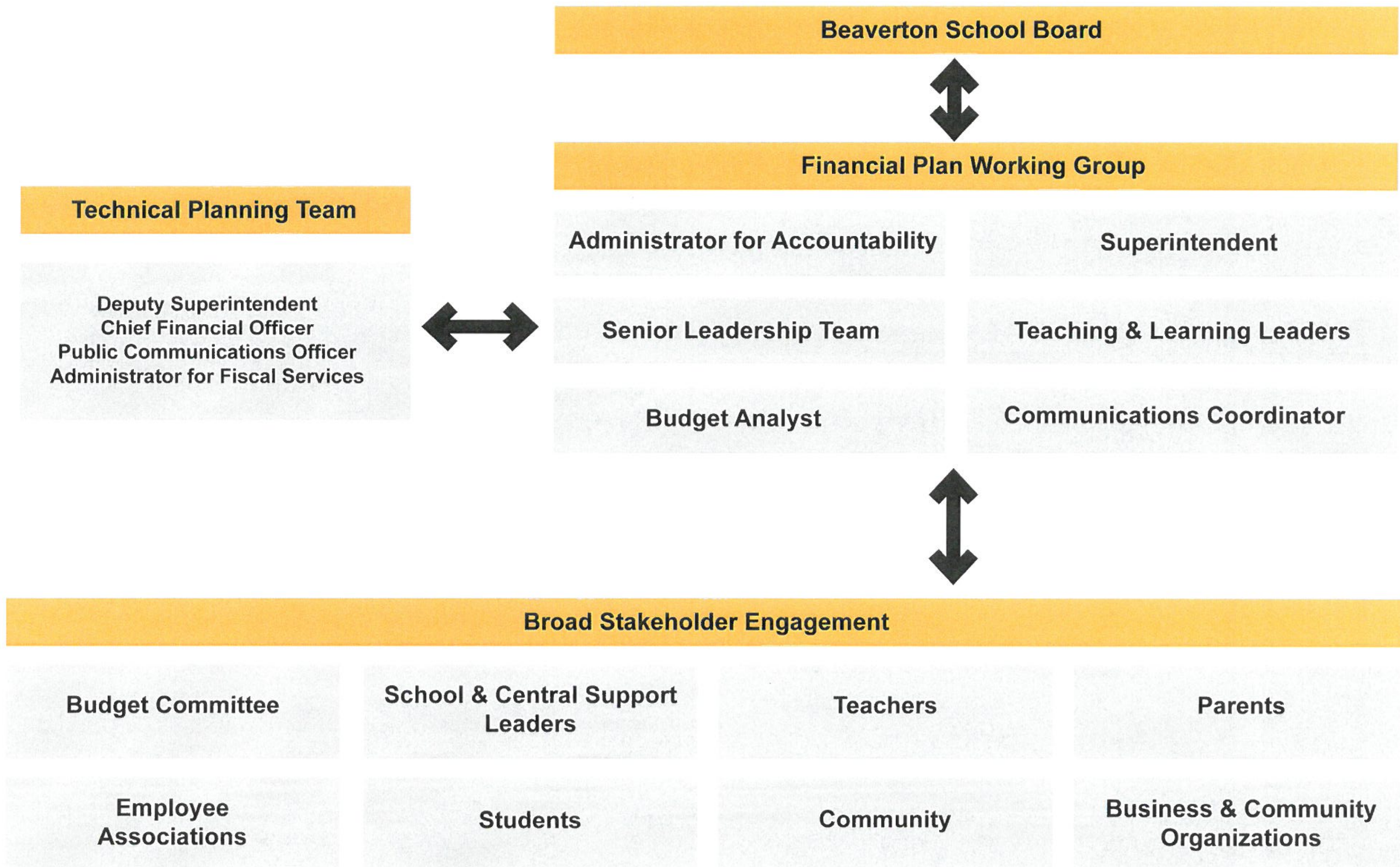
What is a Multiyear Finance Plan?

	What It Is Not	What It Is
Timeframe	• An Annual Budget	• A three to five year financial plan determining the District's investments to meet the strategic plan measures of the District goal and identifying the source of funds to make the investments possible
Link to Strategic Priorities	• Current Service Level rollup based on historical trends without clear ties to strategic plan	• Targeted investments are aligned to the District goal and Pillars of Learning and estimates the cost of implementing the priorities over time
Program Effectiveness & Return on Investment	• Not connected to program evaluation or investment effectiveness	• Evaluation of program effectiveness is essential to the decision-making process to deliver on the District's strategic investments
Responsiveness to Changing Circumstances	• Static	• Financial Plan is updated each year with consideration of revenue, student enrollment and program effectiveness
Stakeholder Engagement	• Created based on input from a small group	• Includes input from a broad set of stakeholders

- The Multiyear Finance Plan does not replace the annual budget, and serves as a starting point for the budget process each year
- The annual budget includes single year actions to support resource alignment described in the Multiyear Finance Plan and includes operational necessities such as fuel costs, utility costs and contract obligations

Process

Governance Structure for development of Multiyear Finance Plan



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Process

The creation of the Multiyear Finance Plan/formal Budget Process will involve significant input from a broad base of stakeholder groups. Information will be transparent and we will seek continuous improvement.

Plan and Prepare

1. Organize Process
2. Assess Landscape
3. Start Engaging Stakeholders

Set Instructional Priorities

4. Develop Priorities
5. Estimate Cost of Priorities

Pay for Priorities

6. Identify Top Savings Options
7. Analyze Top Savings Options

Implement Plan

8. Balance Budget Tradeoffs
9. Adopt Strategic Finance Plan
10. Adopt Annual Budget

Ensure Sustainability

11. Build Internal Capacity
12. Plan for Continuous Improvement

Communication Plan Key Input Groups & Formats	Audience	Multiyear Financial Plan Process JUNE - DECEMBER	Annual Budget Process JANUARY - JUNE
	School Board	- October Work Session - December Set Financial Goals at School Board Meeting	Budget Process
	Financial Plan Working Group	Meeting 1x month with Teaching & Learning Leaders	Internal Budget Process
	Principals	November (Principals trade off meeting)	February Principals Meeting
	Staff, Parents, Community, Budget Committee	November 9 - Multiyear Listening & Learning Sessions - Survey in November	Budget Update Session Jan. 26, 2016
	Students	Focus groups w/ Supt. Rose	Focus groups w/ Supt. Rose

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Financial Goals

- **Community (3):** Class size, instructional time and comprehensive education
- **Instruction (7):** Educator effectiveness, standards based learning system, future ready schools, AVID, culturally responsive practice, learning teams and community partnerships
- **Finance:** Maintain 5% fund balance and 5% rainy day fund

Investments

Analysis and additional stakeholder feedback pointed to specific investments

Class Size	Comprehensive Education	Additional Instruction Time
WE Expect Excellence	Educator Effectiveness	Standards-Based Learning System
WE Innovate	Future Ready Schools	
WE Embrace Equity	AVID	Culturally Responsive Practices
WE Collaborate	Learning Teams	Community Partnerships

Investment Priorities

Investments	Phase-In Timeline
Class Size	**Shorter Term:** Reduce class size.
Ensure all students have access to a comprehensive education including the arts, music, PE, foreign language, and CTE coursework	**Shorter Term:** Expand CTE coursework. **Medium Term:** Meet P.E. instructional time requirements; similar educational experiences at all middle schools.
Provide additional instructional time	**Medium Term:** Add two instructional days. **Longer Term:** Add three additional instructional days.
Educator Effectiveness	**Shorter Term:** Development of teacher preparation partnerships with area universities; Mentorship program for new teachers. **Longer Term:** Expand teacher preparation partnerships with area universities.
Standards-Based Learning System	**Shorter Term:** Professional development for English language arts and math adoptions. **Longer Term:** Expand professional development for future adoptions.
Future Ready Schools	**Shorter Term:** 2015-16: Future Ready Schools Phase 1 in 15 schools. **Longer Term:** District-wide phase-in over three years.
AVID	**Shorter Term:** 10% of secondary content teachers are trained in AVID strategies. **Medium Term:** 20% of secondary content teachers are trained in AVID strategies. **Longer Term:** 50% of secondary content teachers are trained in AVID strategies.
Culturally Responsive Practices (CRP)	**Shorter Term:** School-based administrators will identify key elements of CRP in the teacher evaluation system. **Medium Term:** 100% of all administrators will identify key elements of CRP in all certified and classified evaluation tools.
Learning Teams	**Shorter Term:** All teachers engage in a learning team for 90 minutes each month. **Medium Term:** 100% of all teachers given release time weekly for learning teams.
Community Partnerships	**Shorter Term:** Community Partnership Teams (CPT) continue with technical team in CCI Dept. assisting schools. **Medium Term:** Create CPT volunteer coordinator position to connect community volunteers to school as schools request based on need.

Shorter Term: 1-2 years
Medium Term: 2-3 years
Longer Term: 3-5 years

District Goal: All students will show continuous progress toward their personal learning goals, developed in collaboration with teachers and parents, and will be prepared for post secondary education and career success.

Investment Priorities

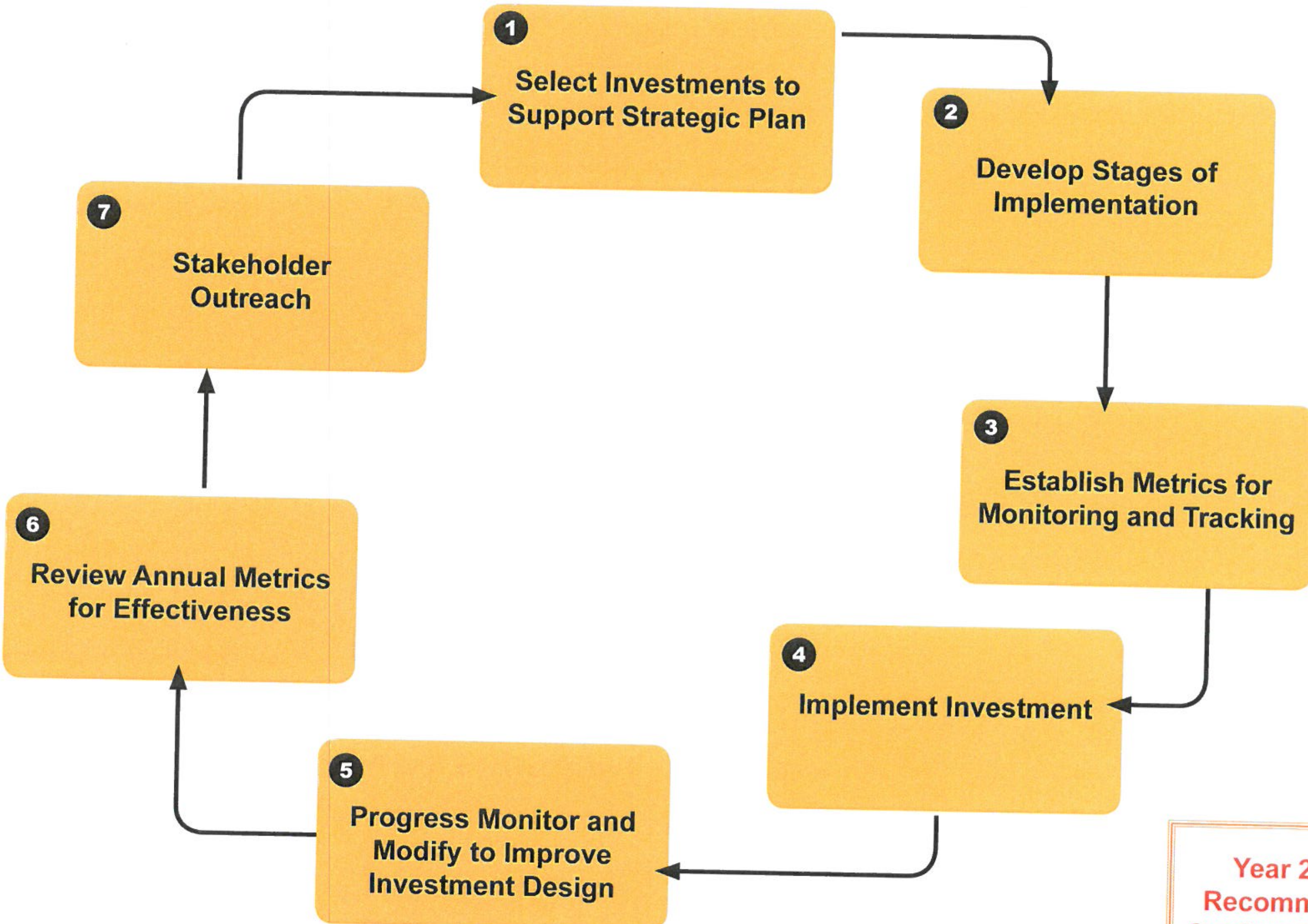
Summary of Investments Added Annually

Investment Priorities	Funding Source	2014-2015	2015-2016	Total
Class Size	Local Option Levy	$7.7M	$9.5M	$17.2M
Ensure all students have access to a comprehensive education including the arts, music, PE, foreign language, and CTE coursework	General Fund	$1.9M	$700,000	$2.6M
	Local Option Levy	0	$1.1M	$1.1M
Provide additional instructional time	--	--	--	--
Educator Effectiveness	General Fund	$1.5M	$400,000	$1.9M
Standards Based Learning System	General Fund	$1.425M	$2.3M	$3.725M
Future Ready Schools	General Fund	$1.2M	$2.7M	$3.9M
	Bond Fund	--	$5.1M	$5.1M
AVID	General Fund	$825,000	$1.1M	$1.925M
	Grant Fund (Nike)	--	$331,000	$331,000
Culturally Responsive Practices	General Fund	--	$2.23M	$2.23M
Learning Teams	General Fund	--	$175,000	$175,000
Community Partnerships		--	--	
Total		$14.55M	$25.636M	$40.186M

BEAVERTON SCHOOL DISTRICT

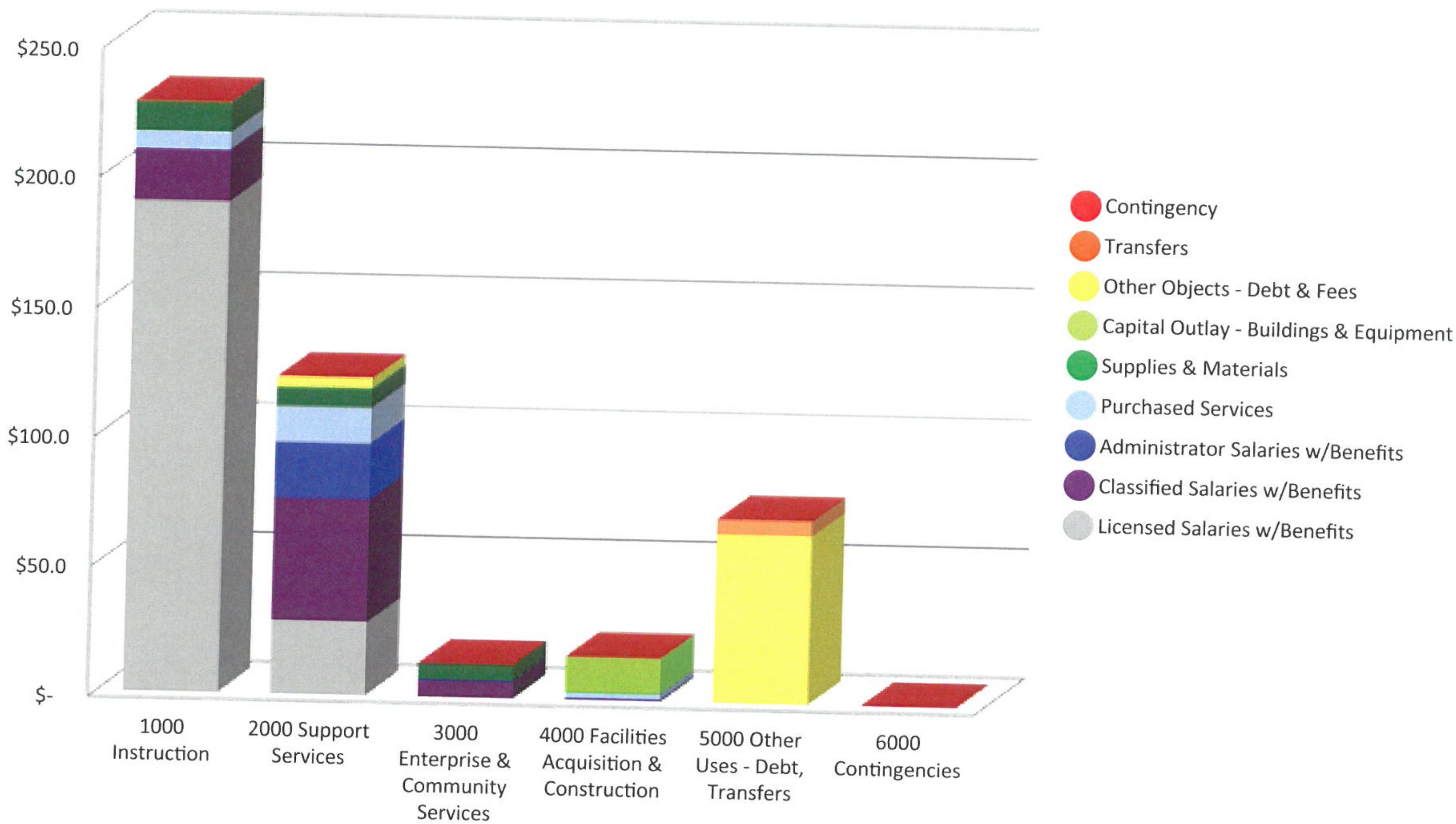
Progress

Monitoring and tracking Beaverton School District progress in effectively investing behind its strategic priorities will be a continuous process.



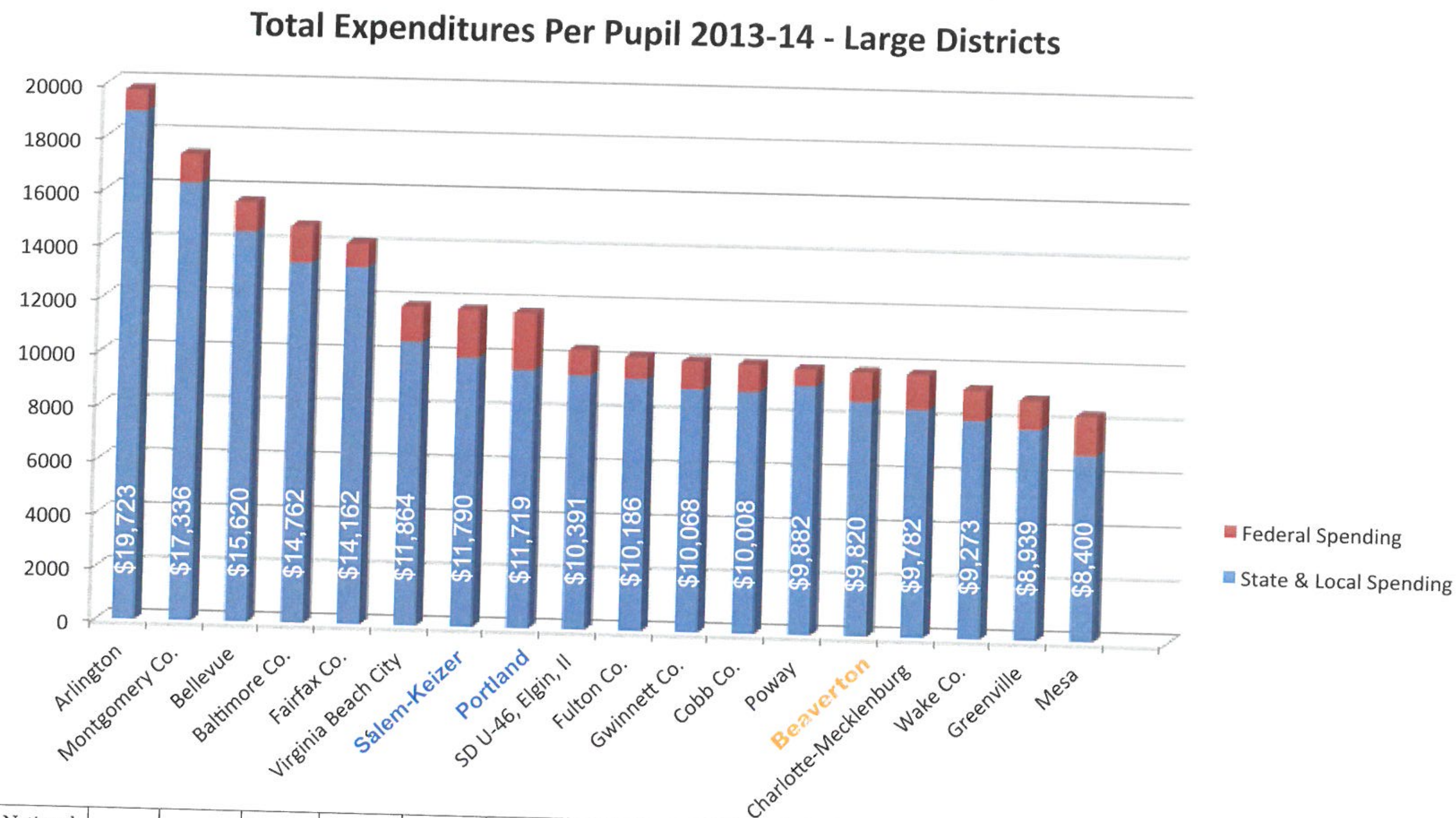
Year 2 or 3 - Make Recommendations for Continued Investment or Reallocation of Funds

Beaverton School District All Funds Expenditures 2013-14 Actuals (in millions)



BEAVERTON SCHOOL DISTRICT

Comparison of Districts

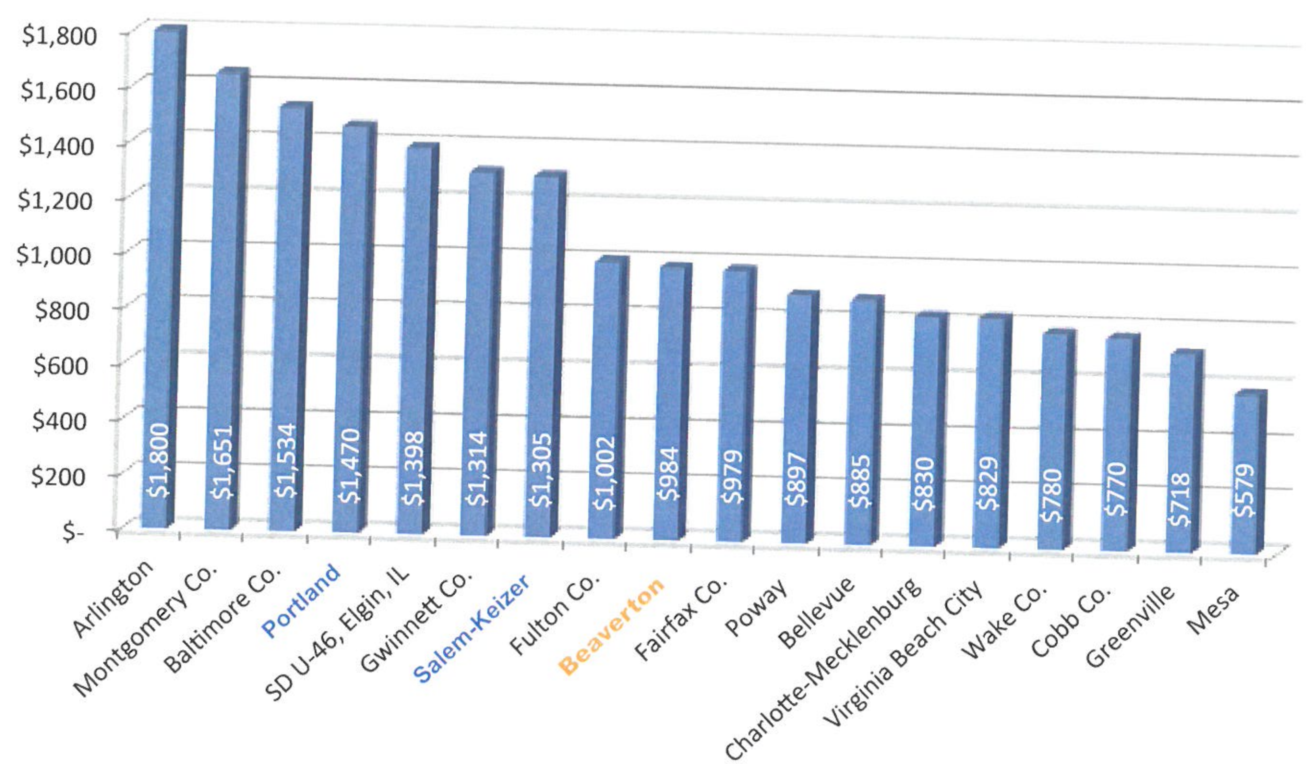


All information from National Center for Education Statistics	Arlington	Montgomery Co.	Bellevue	Baltimore Co.	Fairfax Co.	Virginia Beach City	Salem-Keizer	Portland	SD U-46 Elgin, IL	Fulton Co.	Gwinnett Co.	Cobb Co.	Poway	Beaverton	Charlotte-Mecklenburg	Wake Co.	Greenville	Mesa
Enrollment	22K	149K	19K	107K	181K	70K	40K	47K	40K	94K	165K	108K	35K	40K	144K	151K	74K	108K
Total Expenditures (in $ Millions)	$351	$2,221	$169	$1,380	$2,180	$733	$376	$510	$389	$843	$1,483	$947	$273	$335	$1,094	$1,112	$541	$490

District Goal: All students will show continuous progress toward their personal learning goals, developed in collaboration with teachers and parents, and will be prepared for post-secondary education and career success.

BEAVERTON SCHOOL DISTRICT

Administration Expenditures Per Pupil 2013-14



Administration Expenditures Per Pupil

Administration: Expenditures for the administration of schools and school districts. Includes expenditures for: the School Board, administration of Local Education Agencies, the office of the principal, full-time department chairpersons, graduation expenses, business services, Teaching & Learning, HR, and IT.

All information from National Center for Education Statistics	Arlington	Montgomery Co.	Baltimore Co.	Portland	SD U-46 Elgin, IL	Gwinnett Co.	Salem-Keizer	Fulton Co.	Beaverton	Fairfax Co.	Poway	Bellevue	Charlotte-Mecklenburg	Virginia Beach City	Wake Co.	Cobb Co.	Greenville	Mesa
Enrollment	22K	149K	107K	47K	40K	165K	40K	94K	40K	181K	35K	19K	144K	70K	151K	108K	74K	64K
% Administration	11%	11%	12%	13%	15%	14%	14%	11%	11%	8%	11%	10%	10%	8%	10%	9%	10%	8%