Compensation & Staffing

Professional Development

Technology

Teaching & Learning

LCS

STRATEGIC FINANCE PLAN | 2016 – 2018

Submitted by the
Lake County Schools Leadership Team

Final Plan
January 12, 2015

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Dear Chair, Members of the School Board, and Citizens of Lake County:

I am pleased to submit to you Lake County Schools' second Three-Year Strategic Finance Plan.

The School Board's support continues to give us the necessary guidance and encouragement to assemble this plan. The Three-Year Strategic Finance Plan embraces a bold set of initiatives that hold the promise of meeting the need of redefining how we grow student achievement. It continues to align resources to our instructional priorities and outlines a long-term plan to make these priorities a reality. I wholeheartedly believe that, when enacted, this plan will positively transform teaching and learning in Lake County Schools.

In school year 2013-2014, we determined that we would put in place a Three-Year Strategic Finance Plan. The Leadership Team worked with the LCS School Board over six months with the support of the Boston Consulting Group to establish the first LCS Strategic Finance Plan. On December 16, 2013, the School Board of Lake County adopted this plan. It has served as the framework for establishing instructional priorities supported by identified realignment opportunities for the 2014-15 school year.

This second rolling Three-Year Strategic Finance Plan (SFP) demonstrates this ongoing process of identifying instructional priorities that will support student achievement for all LCS students with the goal of being C^2Ready. In order to fund these priorities, we continue the process of identifying realignment opportunities. As was the case last year, the SFP will anchor the line-item budget for the 2015-2016 school year and beyond.

Change doesn't occur overnight, which is why it is significant to note that both our instructional priorities and realignment opportunities take multiple years to play out. As you examine the SFP, you will notice that most of the categories continue from the first year of the plan and are projected into the future as well. Both our Instructional Priorities and Realignment Opportunities take multiple years to play out. We intend to make deliberate decisions and stabilize this really good effort.

We recognize that it is critical to keep the process going. In upcoming SFPs we will go on to new things, but now we need to put our identified initiatives in place and establish them as the "way we do work." We are realigning work responsibilities. We are focusing on efficiencies within the realignments and effectiveness of the instructional priorities we have proposed. We are using multiple measures to evaluate the instructional priorities and learn what is effective and should remain part of the SFP over time. We are also studying what should be added to our work over time.

For this second year of the SFP process we will continue the following instructional priorities that we believe will support long-term success for students. They will continue to be implemented with the following cumulative three-year costs (incremental to our existing investments in these areas):

- ELL and Struggling Students and Schools: $ 5.5 million
- Talent Development Pipeline: $ 4.8 million
- Teacher Induction & Coaching: $ 1.2 million
- Program Evaluation & Innovation: $0.6 million
- Personalized Learning for Teachers/Leaders: $2.3 million
- Personalized Learning for Students: $7.8 million

With this plan, we also will launch the following initiative:
- Principal Induction and Development: $0.6 million

We will also continue to support the High School Testing Specialists ($1.5 million) and Supervision Support at the high schools ($0.3 million) following the change in scheduling implemented in 2014-15.

These priorities will require the district to reallocate resources from existing activities in the budget along the following timeline: $8.7 million in 2015–2016, $11.4 million in 2016–2017 and $14.6 million in 2017-2018.

This year, we have been fortunate in winning two grants from the Bill and Melinda Gates Foundation that add support to our instructional priority listing. The initiative for "Personalized Learning for Teachers and Leaders" is now supported by a three-year Innovative Professional Development grant for $3.9 million. Also, we have won support for the Personalized Learning for Students Initiative with Phase I and Phase II Next Generation grants totaling $400,000. We are currently in competition for approximately $2 million for a Phase III Next Generation grant. Additionally, we have been notified that the National Institute for School Leadership has won a large i3 grant from the federal government. We are a participating school district in this grant which will support our Principal Induction and Development initiative.

In addition to funding these instructional priorities, the district anticipates a significant budget gap for these three years. Absent new investments or unanticipated expenditures, the district projects a budget shortfall of approximately $0.9 million in 2015–2016, $2.8 million in 2016–2017, and $6.8 million in 2017–2018. Much of this shortfall may be attributed to slow growth in revenues from certain funding sources paired with increased enrollment and a growing staff salary base. To close the shortfall and fund the priorities, the district must realign roughly $8.7 million in 2015–2016, $11.4 million in 2016–2017 and $14.6 million in 2017-2018.

The resource realignment strategies earmarked for 2015–2016 comprise the following activities:
- Reassigning some capital-related expenses from the general fund to the capital fund
- Ongoing savings in moving from a block to straight schedule at our high schools
- Ongoing savings from centralizing and consolidating purchasing practices
- Ongoing savings from strategically reducing our IDEA funding reserve (one-time savings each of the next two years)
- Allowing for additional management decisions to drive continuing operational efficiencies
- Realizing savings from optimizing our new transportation routing software
- Implementation of the new administrative salary schedule which created a range of pay for administrators
- Ongoing savings from efficiencies gained in athletics travel

Based on our current assumptions, these actions will balance our 2015–16 budget. To achieve a balanced budget in years 2016-17 and 2017-18, in addition to continuing with these initiatives, we intend to explore additional activities:
- Clerical staff consolidation based on Skyward efficiencies
- Revision of guidance counselor role and allocation structure
- Additional ESE efficiencies including reimbursement (revenues) for ESE services via Medicaid and other insurance sources and the Facilitative Support allocation structure
- District Skyward system efficiencies including school and district supplies and staff
- Introduction of new school models
- Revision of overall materials and supplies budget
- District staffing allocation structure including the over-all professional development funding and allocation structure
- Other opportunities to be identified during the rolling SFP process

Upon approval, the Three-Year SFP will serve to guide our annual budgeting process to ensure our instructional priorities are being funded and budget gaps are closed. We will continue to update the plan each year on a rolling basis, evaluating activities of the prior year and adding one year to the plan. The plan's extended time horizon and rolling nature increase our ability to spend money smarter—so that every dollar is used to support the community's educational vision and priorities.

LCS has been privileged to be part of the development of this emphasis on spending money smartly - where every dollar is used to support priorities that produce stellar teaching and learning. Along with three other districts, the initial project has become the basis for other school districts in the United States to create their own plans. The project developed the tools, strategies and structures to support this work and are featured on an easily accessible website at smarterschoolspending.org.

This plan was not created in a vacuum and will not continue without input from multiple stakeholders. Numerous individuals from schools, the district office, and the community have developed the instructional priorities and resource realignment opportunities. I wish to thank all stakeholders for their time and input. Through our work groups and input from our community on Mindmixer we have had a significant contribution to the district's efforts. Everyone's participation is critical to the success of the SFP.

In closing, I think it's important to note that this is a continuous process. We do not see a finish line as this truly becomes a working document that is unceasingly assessed. Together, using this process, we are certainly making the vision of a stronger Lake County School District a reality.

Sincerely,

Susan Moxley

Susan Moxley, Ed.D.
Superintendent of Lake County Schools

Lake County's second Three-Year Strategic Finance Plan was developed by the members of the Lake County Schools Leadership Team in collaboration with numerous individuals from schools, the district office, and the community as part of the EngageLCS initiative:

Project Oversight & Management Working Groups

Leadership Team
Susan Moxley, Superintendent (Lead)
Marilyn Doyle, Chief of Administration
Will Davis, Chief of Operations
Liz Hobert, Coordinator, Special Projects
Carol MacLeod, Chief Financial Officer
Laurie Marshall, Chief of Staff
Sherry Owens, LCS Communications Officer
Creed Wheeler, Executive Director of IT

Communications & Stakeholder Engagement Group
Sherry Owens, LCS Communications Officer
Brian Payne, LCS Community Resource Liaison
Liz Hobert, Coordinator, Special Projects
(Team to be reconfigured by new Communications Officer)

Community Advisory Group
(This advisory group will be developed to parallel the School Models Working Group with representatives from each region included)

Instructional Priorities Working Groups

ELL & Struggling Students
Kati Pearson, Director of Teaching and Learning (Lead))
David Christiansen, Chief Academic Officer (Lead)
Robin Neeld, Title III Program Specialist
Jeanette Tietjen, MTSS Program Manager
Rehana Insanally, Program Specialist, Differentiated Accountability
Liz Bourdon, Director, Federal Compensatory Education
Judy Miller, Director of ESE
Carmen Arnold, Director of Curriculum & Instruction, Elementary
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Rob McCue, Principal, SLHS
Barbara Longo, Principal, OPMS
Leah Fischer, Principal, SSES

Teacher Induction/Training for Instructional Coaches Group
Stacey Roberts, Director, PD and Leadership (Lead)
Rusty Dosh, Administrative Coordinator, Federal Programs
Kathy Halbig, Manager of Innovative Learning
Randy Campbell, Principal, UHS
Andrea Guogas, Project Manager, Evaluation and Compensation
Elizabeth Feld, Instructional Coach
Theresa Frisby, Instructional Coach
Linda Conner, Instructional Coach
Judy Davis, Instructional Coach
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Nicole Moses, Instructional Coach
Stacia Tatum, Instructional Coach
Kenya Williams, Instructional Coach
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Pam Chauteneuf, Principal, GMS
Jacob Stein, Assistant Principal, ERHS
Steve Benson, Principal CMS
Linda Shepherd-Miller, Principal, LMHS
Brenna Burkhead, Principal, SES

Personalized Learning for Teachers & Leaders
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Stacey Roberts, Director, PD and Leadership
Andrea Pyatt, iPD Facilitator
Kelly Cousineau, iPD Design Expert
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Liz Hobert, Coordinator, Special Projects
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Randy Campbell, Principal, UHS
Charlie McDaniel, Principal, ERMS
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Personalized Learning for Students
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Clinton Pownall, Community Member/Business Owner
Bill Giffing, Community Member
Dr. Michael Hynes, Director of Teaching and Learning, UCF
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Heather Gelb, Principal, Sawgrass Bay Elementary School)

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Marilyn Doyle, Chief of Administration
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Stuart Klatte, President, LCEA
TBD, Program Specialist from ASU
Julie Summerlin, Coordinator, Career, Adult & Community Education
Michelle Hoppenstedt, HR Tech & Support Manager
Maureen Slovak, Ad Hoc Member
Linda Shepherd-Miller, Principal, LMHS Principal
TBD, Middle School Administrator
TBD, Elementary Administrator

Program Evaluation and Innovation
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Laurie Marshall or designee, Chief of Staff
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Naomi VanAmberg, Federal Programs
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Parul Acharya, Program Innovation and Evaluation Analyst
(Ad Hoc members: Principal Representatives and District Staff as needed for innovation submissions and program evaluations)

Realignment Opportunities Working Groups

Self-funding across PD initiatives:
IDEA and Title I and II Realignment
David Christiansen, Chief Academic Officer (Co-lead)
Carol MacLeod, Chief Financial Officer (Co-lead)
Stacey Roberts, Director, Professional Development & Leadership
Pat Lawson, Administrative Coordinator, ESE
Rusty Dosh, Administrative Coordinator Federal Programs
Melissa Lyford, Program Specialist, ESE
Laura Wright, ESE School Specialist, MDMS
Trella Mott, Principal, TMS
Kay Sawchuk, Principal, EES

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Stacey R. Roberts, Director PD and Leadership
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Mike Corr, Director, Maintenance
Judy Miller, Director, ESE
Liz Bourdon, Director, Federal Compensatory Education
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Kelly Sanders, Principal, UMS
William Roberts, Assistant Principal, WHMS

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Tom Mock, Director, Internal Audit
Kim Cronin, SIEU
Jessica Hopperton, Data Entry, Virtual School
Kimberly Jarvis, Principal, GES
Angela Jones, Administrative Assistant to Chief of Operations
Diane Lingerfelt, Fiscal Assistant, Risk Management
Charlene Moye, HR Specialist
Jennifer Pease, School Secretary, Carver Middle
Julie Summerlin, Coordinator, Career, Adult & Community Education
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Guidance Counselors
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Denise Burry, Parent
Michelle Carpenter, Parent
Pam Chauteauneuf, Principal, GMS
Mollie Cunningham, Principal, CMS
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Pat Lawson, Administrative Coordinator, ESE
Tonya Mass, Program Specialist, Testing and Evaluation
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Stacy Pallitto, School Counselor, TES
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Nanci Schwartz, Parent
Jeanette Tietjen, Program Manager, Teaching and Learning
Paula Wicker, Program Manager, Testing and Evaluation

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Harris Jacobs, Manager, Information Services
Lauren DeRidder, Risk Manager
Kim Varnadore, SAC Representative, MDHS
Beth Shaver, SAC Representative, GLES
Mike Woods, Planner, Metropolitan Planning Organization
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Linda Monroe, Bus driver, Lake Ridge lot
Kim Cronin, SEIU
Lori Mattox, Transportation Operations Manager
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Charles Feld, Assistant Principal, ERHS
Keith Hunt, Assistant Principal, WHMS

Maintenance Lawn Care
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Gary Rogers, Maintenance Manager
Dominick Pedata, Supervisor, Employee Relations and Compensation
Tom Mock, Director, Internal Audit
Pat Todd, District Athletic Director
Wayne Kicklighter, Maintenance Manager
Mark Kelly, Grounds Representative
Terry White, Custodian, PRES
Gregg Moore, Head Custodian, UMS
Alphonso Williams, Custodian, TES
Kim Cronin, SEIU
Kelly Sanders, Principal, UMS
Carl Hall, Assistant Principal, THS
Johnathan Owens, Principal, EMS
Cleamstine Caple, Principal, CES

Central Office for District Staff/Consolidating Title I Offices
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Carol MacLeod, Chief Financial Officer
Tom Mock, Director, Internal Audit
Kelly Randall, Senior Planner
Rusty Dosh, Administrative Coordinator, Federal Programs

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Introduction

Purpose of the Strategic Finance Plan

The Lake County School District (LCS) Leadership Team commits to presenting a budget that aligns to the strategic resource alignment decisions outlined in the Strategic Finance Plan (SFP), so that the budget supports execution on the district's strategic goals.

This Three-Year Strategic Finance Plan outlines Lake County School District's financial strategy over a three-year period. Its objectives are to:
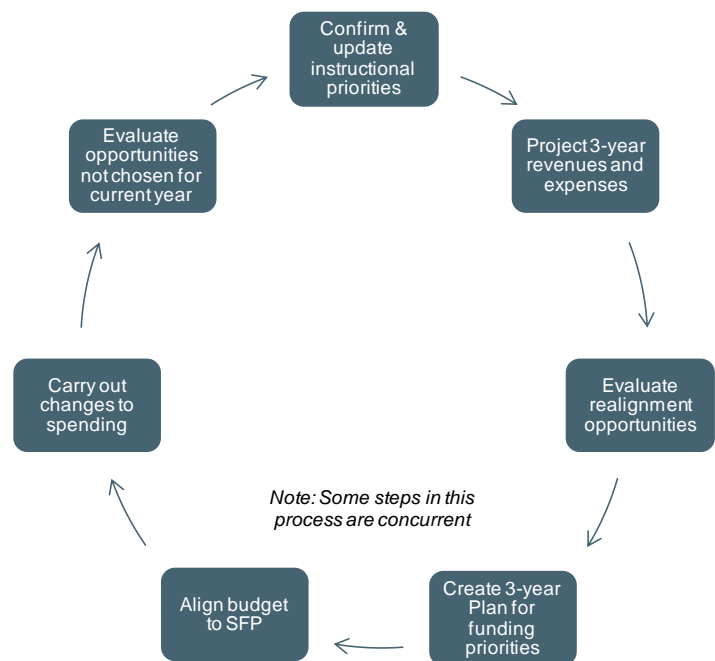1) Identify the district's strategic priorities
2) Estimate the costs of those priorities
3) Describe the actions to be taken that will save or realign money to fund those priorities

How this plan differs from the typical approach

Typically, school districts use a single-year planning horizon and rely heavily on the previous year's expenditures to project the following year's expenses. This approach does not allow for a strong link between spending and a district's priorities. Additionally, the full, multi-year, detailed cost of initiatives often is not known or considered as part of the budgeting process. At the end of the typical process, a district has a detailed and precise picture for the single year and an imprecise, potentially even inaccurate picture for future years.

The Strategic Finance Plan provides a comprehensive budgeting approach while still holding growth in student achievement as its core objective.

In contrast to the typical approach, the Strategic Finance Plan approach is focused on aligning funding to the strategic priorities that will meaningfully impact student achievement. Rather than a single-year cycle, this process looks across a three-year time horizon. It also incorporates informed assumptions about what the district's financial picture will look like in future years instead of relying solely on past expenditures. Furthermore, it integrates a robust picture of the costs of initiatives as part of the decision process. Underlying the Strategic Finance Plan is a spotlight focus on academic return on investment in terms of student achievement.

Confirm & update instructional priorities

Project 3-year revenues and expenses

Evaluate realignment opportunities

Create 3-year Plan for funding priorities

Align budget to SFP

Carry out changes to spending

Evaluate opportunities not chosen for current year

Note: Some steps in this process are concurrent

The SFP is a rolling view of district finances

The SFP was submitted for the School Board's approval in January 2014. The Leadership Team will update the SFP each fall prior to the start of the budgeting cycle, on a rolling basis, evaluating activities of the prior year and adding one year onto the plan. Similar to the district's five-year Capital Plan, a benefit of the SFP is its multi-year span. Painting a long-term view of the district's financial baseline and investment strategy provides visibility into the future financial picture sufficiently far in advance of when action is required. This district shift away from "just-in-time" alignment of the budget supports being strategic in planning and decision-making.

Widening the time span, however, brings uncertainty to the planning process. The plan for investing and realigning is sensitive to the projected budget for these years, which is dependent upon several revenue- and enrollment-related assumptions that are not known until after each school year begins. Funding levels for Florida School Districts are determined annually by action of the Florida Legislature through the General Appropriations Act. The Legislative Session begins early in March and is scheduled to convene for 60 days, barring the need for extended sessions. Statutorily, the final budget is not approved by the School Board until early September, although the fiscal year begins on July 1.

Timing	Steps in state Budget Process
March	Legislative session begins
May	Legislative session ends
June	Governor approves state budget
July 1	Fiscal year begins
September	Board approves final budget

This Legislative timeframe is part of the uncertainty to consider in the presentation of the SFP. This plan lays out particular 2015-16 actions based on stated assumptions. Unexpected changes in revenue or enrollment projections will require changing the planned execution of the SFP. Specific changes will be addressed as part of the creation of the district budget. Understanding that budgeting is intended to be a fluid and dynamic process, subject to revision and reflection, commitment to funding the district's instructional priorities stands firm.

For 2016-18, the district also commits to presenting a balanced budget that continues to fund instructional priorities. Because extended projections are less certain and less precise than 2015-16, exactly how this will be accomplished is less defined. However, the district commits to continuing actions to fund the identified instructional priorities in 2016-18.

Overview of Instructional Priorities

The instructional priorities included in the SFP address the immediate needs of students and support achievement of all students long-term. The following priorities have been implemented for the 2014-15 school year:

ELL & Struggling Students and Schools	Talent Development Pipeline	Teacher Induction & Coaching
Fund programs aimed at closing the achievement gap of English Language Learner students; support struggling schools and students to help increase achievement	Add transparency to career progression in LCS, and additional stipends for leadership roles and service at the district's neediest schools	Implement robust coaching support for new teachers to increase effectiveness and establish district-wide framework for coaching practices

Program Evaluation & Innovation	Personalized Learning for Teachers & Leaders	Personalized Learning for Students
Implement a process to initiate, evaluate, and extend programs based on their impact on student achievement	Build differentiated support for teacher/leader professional development and individualized student learning, supported by technology
(iPD $3.9 million Grant)	Build differentiated support for teacher/leader professional development and individualized student learning, supported by technology
(Next Gen $400,000 Grant)

Principal Induction & Development

Implement robust coaching support for new principals to increase effectiveness and speed movement up the learning curve; provide support for experienced principals to increase capacity for instruction leadership
(NISL Grant i3 Partnership)

- **This priority was identified last year and scheduled for launch in 2015-16**

Instructional priorities: incremental investment by year

Implementing these instructional priorities will require a significant investment of time and talent. The district will monitor the performance of these instructional priorities throughout the process, maintaining a focus on academic return on investment.
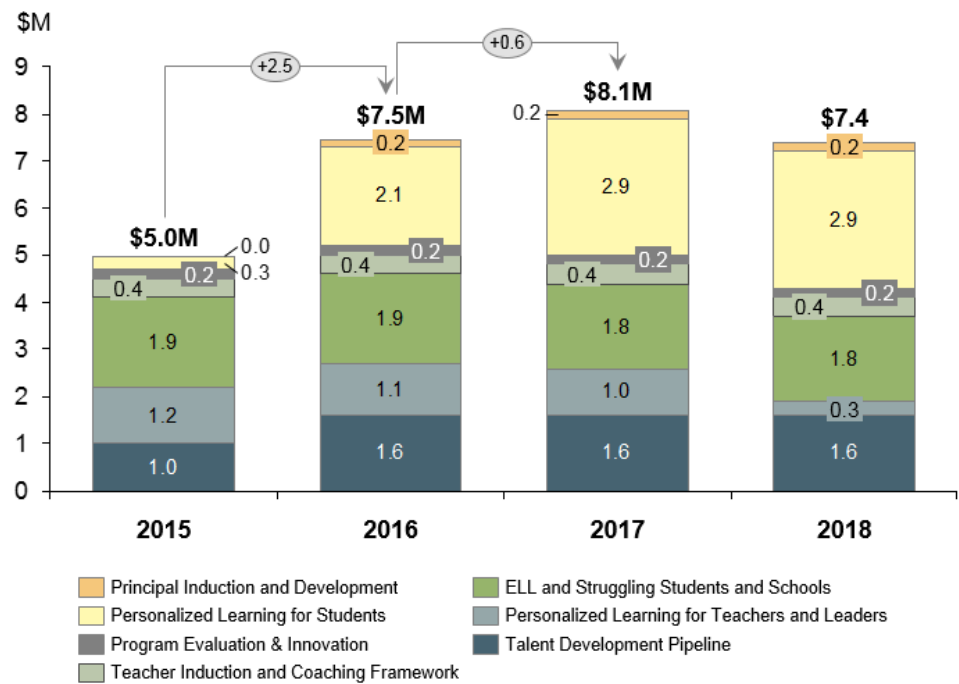
Note: Some figures have been rounded; for more precise cost breakdown, see Appendices A-G

Detail on programming for each Instructional Priority

English Language Learners (ELL) and Struggling Students Initiative *(See [Appendix A](#) for additional detail on programming and costs)*
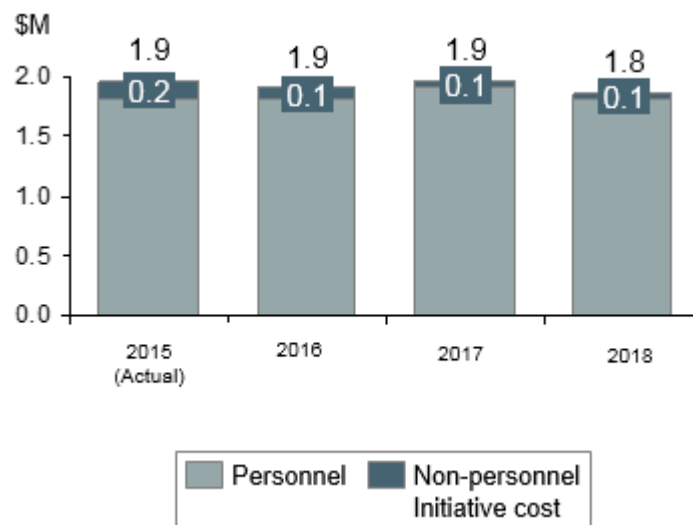
What is the need? LCS needs to support an increase in student achievement for ELL and Level 1 and 2 students. LCS spends less in additional funding on ELL students than the median of comparison districts. Additionally, the LCS ELL population is growing steadily as the student achievement rates continue to be low. Given the overall low-funding level in LCS, resources are limited for differentiating instruction for students with less than proficient test scores.

Why this strategy? This initiative will support increased achievement for this growing student population.

What will the district do?

- Create infrastructure and strengthen systems and processes district-wide, supporting the needs of ELLs and Struggling Students & Schools
- Provide researched-based strategies and professional development aligned to the needs of ELLs and struggling students to build capacity, knowledge, and skills
- Work collaboratively with Title I in professional development of Literacy and ELL Teacher Assistants
- Provide schools with technical assistance, onsite support, and resources
- Identify, maintain, develop, and track district resources
- Provide ongoing monitoring and support
- Provide additional teachers (ARTS) and Teacher Assistants to support struggling students at designated schools
- Meet bi-monthly with school-based ESOL Contacts and Acceleration Resource Teachers
- Conduct on-site technical assistance training at all schools with new ESOL School Contacts to provide training and support

What will it cost?

What gains does the district expect?

Return Metrics

Goal: Outperform State Targets	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	State Target AMO Reading 2018	District Target AMO Reading 2018
English Language Learners	49	49	56	60	62	70	TBD	72

Goal: Decrease Amount	District Reading 2012	District Reading 2013	District Reading 2014	District Reading Target 2015	District Reading Target 2016	District Reading Target 2017	District Reading Target 2018
Level 1&2 Students	44	44	43	30	26	22	18

Goal: Increase Achievement	District Reading 2012	District Reading 2013	District Reading 2014	District Reading Target 2015	District Reading Target 2016	District Reading Target 2017	District Reading Target 2018
Lowest 25%	66	61	66	70	70	75	75

Goal: Increase Achievement	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	District Reading Target 2018
Graduation Rate (All Students)	75	78	80	85	90	95	95
Graduation Rate (ELL)	61	57	62	70	80	90	95

Talent Development Pipeline *(See [Appendix B](#) for additional detail on programming and costs)*

What is the need?
The district needs to provide transparent pathways and clear processes for promotion and increased responsibility for teachers, administrators and district leadership through the creation of a talent development pipeline. The pipeline needs to be aligned with the staff compensation system to provide incentives for staff members to improve and gain more responsibility

Why this strategy? Lake County School District's compensation system has not rewarded teachers for excellence in the classroom, nor has it recognized that some instructional positions require different skill sets. This approach does not optimally support increased student achievement, nor does it fully recognize teacher quality.

This strategy will reward the most effective teachers in the district and increase effectiveness and impact of instructional leaders in order to drive student achievement.

What will the district do?
- Implement Career Pathways for teachers and other instructional Staff
- Reward teachers based on performance as indicated through summative evaluations
- Provide leadership opportunities to teachers and other instructional staff based on performance as indicated through summative evaluations

What will it cost?
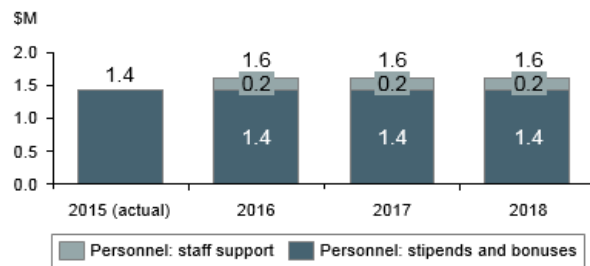
What gains does the district expect?

Performance Return Metrics	2015	2016	2017	2018
% of teachers with positive value-added measures (VAM)	**81%**	**82%**	**83%**	**84%**
Increased retention rate of Highly Effective teachers (% retained annually)	70%	78%	86%	90%
Higher turnover of teachers rated Ineffective (% who leave the district voluntarily annually)	2%	3%	5%	7%
Increased teacher transfer rates from low-need schools to high-need schools	2%	3%	5%	7%
% of administrators reporting that pipeline helps retain effective teachers	65%	75%	90%	95%
% of teachers reporting that pipeline contributes positively to motivation to improve instructional practice	65%	75%	90%	95%

Teacher Induction and Coaching Framework *(See Appendix C for additional detail on programming and costs)*

What is the need? This priority provides a district framework for instructional coaching and high-quality teacher induction support for all new teachers. Research is clear that the most important factor in improving student achievement is the quality of the classroom teacher. Through this priority, Lake County will be able to increase teacher effectiveness and new teacher retention.

Why this strategy? This priority is based on the work of the New Teacher Center and Marzano/Learning Sciences International. Through these nationally recognized, research-based organizations our instructional coaches will develop a deep repertoire of coaching skills that impact teacher practice to improve student learning outcomes.

What will the district do?
- Site-based support for all first year teachers
- Collaborative support with school leadership teams for teachers in their second and third year of teaching
- Training for all district instructional coaches and school-based content coaches
- District framework for training instructional coaches

What will it cost?
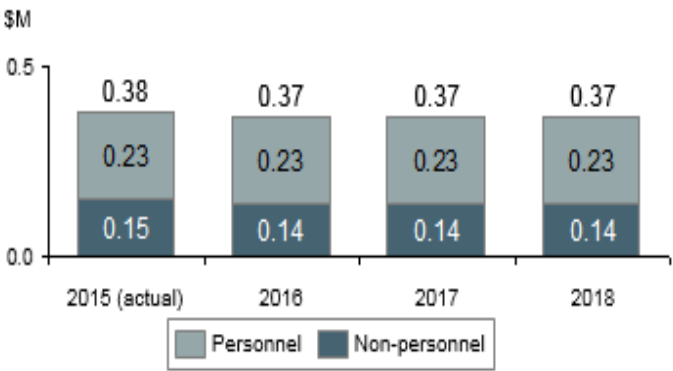
What gains does the district expect?

Metric*	2015	2016	2017	2018
% of Effective teachers retained	73%	75%	77%	79%
First-year teacher value-added measures (VAM)	Waiting for compilation of 2015 scores to create 2015 baseline			
First-year teacher instructional practice scores	3.1 (Effective)	3.10	3.20	3.30
% of first-year teachers rated Effective or Highly Effective	93%	95%	97%	99%

Additional metrics in development

Principal Induction & Development *(See [Appendix D](#) for additional detail on programming and costs)*

What is the need? LCS principals, as the instructional leaders of schools, are central to student achievement. However, Lake County has no funding and no formal support system for new principals. Additionally, deeper training for established principals is needed to support them as instructional leaders.

Why this strategy? This strategy will increase teacher effectiveness and ultimately support growth in student achievement through the focused development of strong instructional leaders.

What will the district do?
- Improve the level of support given to principals through professional development, one-on-one mentoring, and professional learning communities.
- Create the role of Principal Coach, tasked with program oversight and implementation, organizing professional development for principals, and meeting with principals regularly to provide feedback.
- Provide tailored, targeted support based on four groupings of staff: targeted assistant principals, first-year principals, second-year principals, and 3+-year principals.

What will it cost?
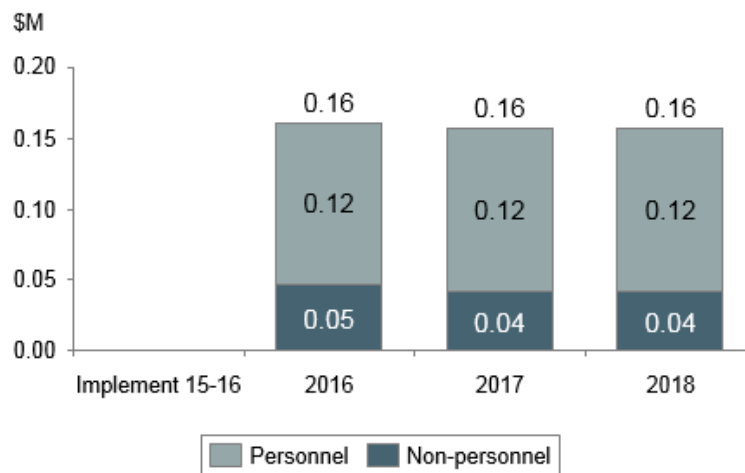
What gains does the district expect?

Performance Return Metrics*	2016	2017	2018
% of principals receiving a 4.0 or above on LEADS Principal survey	*Targets forthcoming*		
% of principals rated Highly Effective on the LEADS evaluation	21%	27%	35%
% of principals rated Effective on the LEADS evaluation	75%	70%	65%
% of principals whose FLDOE school grade is an A or B	67%	75%	80%
*Additional metrics in development			

Program Evaluation & Innovation Process *(See Appendix E for additional detail on programming and costs)*

What is the need? To 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. 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. Develop a culture of data-driven decision making through implementation of this process.

Why this strategy? To ensure the best return on investment for district funds.

What will the district do?
- Evaluating targeted innovations to determine best investments for intended outcomes.
- Evaluating all instructional priorities included in the District Finance Plan to report return on investment
- Evaluating current programs to determine return on investment to inform decisions on continuing, modifying or discontinuing programs (Achieve 3000, PD 360, AVID, PreK Reading Programs)

What will it cost?
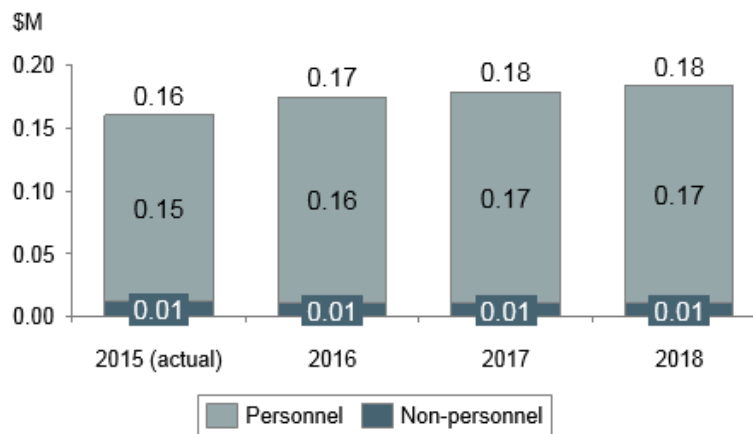
What gains does the district expect?

Return Metrics*

	2015	2016	2017	2018
# of Program Evaluations of Instructional Priorities	7	7	7	7
# Program Evaluations on additional high profile/high investment programs	4	5	6	7
Cost savings as a result of program evaluations	$25,000	$50,000	$100,000	$150,000
Percentage of ROI calculations determined to be positive returns.	60%	75%	90%	90%
Percentage of identified performance metrics for monitored programs showing improvement	50%	65%	75%	80%
Stakeholder satisfaction regarding integrity of evaluation process	100%	100%	100%	100%
Stakeholder satisfaction related to effectiveness of program monitoring	100%	100%	100%	100%
*Additional metrics in development				

Personalized Learning for Teachers and Leaders *(See Appendix F for additional detail on programming and costs)*

What is the need? With this initiative, LCS will focus on methods to personalize learning for teachers and leaders through various systems, structures and support systems. This fills the need for professional learning that is innovative and driven by the needs of leaders, teachers and students. The initiative will allow LCS to integrate a system of supports and professional learning for teachers that will empower them as they develop more effective teaching practices.

Why this strategy? LCS will seek to address the lack of an integrated, aligned system for personalized learning to support teachers' effectiveness. This problem is amplified by the move to more rigorous standards that require significant shifts in instruction, curriculum and assessment.

What will the district do?
- Ensure all teachers have ample time within the school day for collaboration (without sacrificing quality student learning) focused on core instructional work
- Provide multi-modal access to high-quality PD content based on teachers' needs and student results
- Provide all teachers with frequent opportunities and multiple sources of feedback on their instructional practice
- Assess the impact of professional development content and experiences

What will it cost?
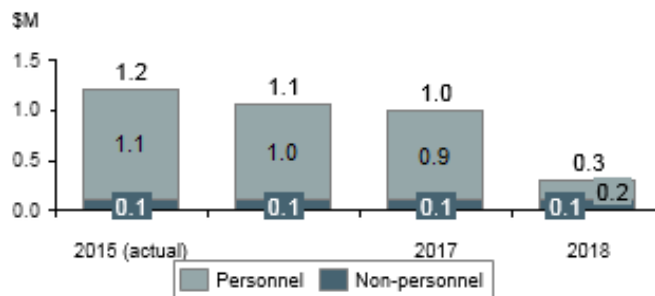
What gains does the district expect?

Performance Return Metrics	YR 1	YR 2	YR 3
Teacher effectiveness ratings			
Value-added measures (VAM)	*Metrics being revised to coordinate with Innovative Professional Development (iPD) grant evaluation*		
Feedback from teacher survey			
Usage rate for professional development software (currently PD360)			

**Personalized Learning for Students** *(See Appendix G for additional detail on programming and costs)*

What is the need? This instructional priority helps fulfill the district need of teaching all of our Lake County students in a way that will prepare them for success in college and/or career.

Why this strategy? By providing a learning environment that is personalized (and individualized) based on a student's likes, interests, and needs, we believe we can move into a system in which all students find success.

What will the district do?
- Eight schools are currently in the planning stages for implementation of personalized learning during the 2015 – 16 school year including Lost Lake Elementary, Sawgrass Bay Elementary, Carver Middle, Windy Hill Middle, Eustis High School, Lake Minneola High School, South Lake High School, and Umatilla High School are all part of our first cohort of schools

- On December 11, 2014, each of the above schools presented their plans for personalized learning, and, if selected to move forward, will begin a phase of deeper, more specific planning (from January 2015 – August 2016), and then will begin implementation in August 2015. Those schools selected to move forward will receive implementation funds from the Bill and Melinda Gates Foundation of up to $500,000 per school

- Cross-functional teams are finishing up with initial guidance that can help other LCS schools as they begin to come online with personalized learning in future cohorts. Teams have been focusing on the five strategic goals for personalized learning: student-directed learning; learner profiles and individual paths to mastery; competency-based progression; flexible learning environments; and accountability and continuous improvement

- Cross district teams, consisting of representatives from Lake County along with representatives from each of the other five districts participating in the NextGen grant (Henry County, GA; Pinellas Co, FL; Dallas, TX; Denver, CO; and Riverside, CA) are creating guidance in the areas of Budget and Finance, Competency-Based Progression, Communication, Talent and Professional Development, and Technology

What will it cost?
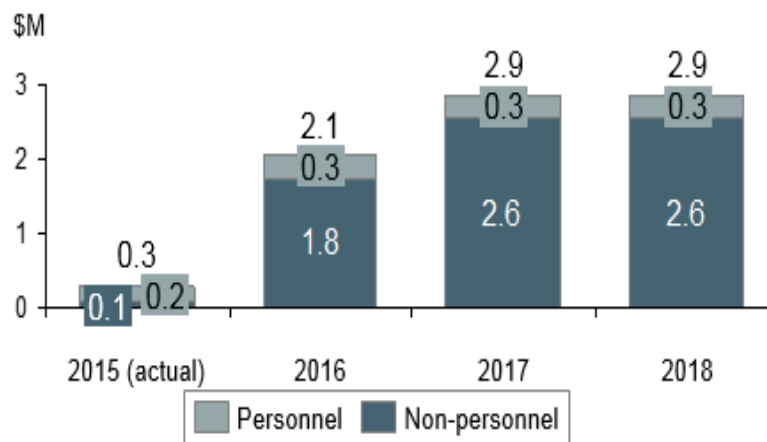
What gains does the district expect?

Return Metrics:

What are target performance returns?				
Metric	**'15**	**'16**	**'17**	**'18**
Student feedback on survey	Metrics being revised to coordinate with Next Gen Grant evaluation			
Student formative assessment scores				

Instructional Priorities Costs ($M)				
	2014-15 (Actual)	**2015-16**	**2016-17**	**2017-18**
ELL & Struggling Students and Schools	(1.9)	(1.9)	(1.8)	(1.8)
Talent Development Pipeline	(1.0)	(1.6)	(1.6)	(1.6)
Teacher Induction & Coaching Framework	(0.4)	(0.4)	(0.4)	(0.4)
Principal Induction & Development	(0.0)	(0.2)	(0.2)	(0.2)
Program Evaluation & Innovation	(0.2)	(0.2)	(0.2)	(0.2)
Personalized Learning for Teachers and Leaders	(1.2)	(1.1)	(1.0)	(0.3)
Personalized Learning for Students	(0.3)	(2.1)	(2.9)	(2.9)
Total	(5.0)	(7.5)	(8.1)	(7.4)

Note: Some figures have been rounded; for more precise cost breakdown, see Appendices A-G

Instructional Priorities Costs ($M) – Incremental expenditure view				
(View shows additional funding added in a given year on top of the continuing investment from previous years)				
	2014-15 (Actual)	2015-16	2016-17	2017-18
ELL & Struggling Students and Schools	(1.9)	0	0.1	0.1
Talent Development Pipeline	(1.0)	(0.6)	0	0
Teacher Induction & Coaching Framework	(0.4)	0	0	0
Principal Induction & Development	(0.0)	(0.2)	0	0
Program Evaluation & Innovation	(0.2)	0	0	0
Personalized Learning for Teachers and Leaders	(1.2)	0.1	0.1	0.7
Personalized Learning for Students	(0.3)	(1.8)	(0.8)	0
Total	(5.0)	(2.3)	(0.7)	(7.4)

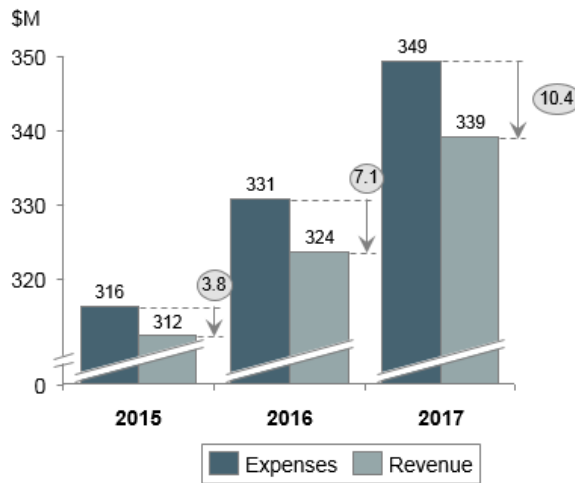## LCS baseline financial picture

Creating the second Strategic Finance Plan embeds this process in the district's regular "way of doing work."

Our goal is a continuing effort to improve efficiencies and move funding to target key instructional priorities.

LCS has an exceptionally lean budget and has historically done a good job of identifying, prioritizing, and protecting mandatory costs so that requirements have been met. Turning to a school-by-school view, school allocation formulas and systems largely distribute resources evenly across the district. Expenditures on direct instruction as a percent of the total budget were lower than anticipated as a result of both the substantial amount of fixed costs required to run a school district and strategic decisions in previous years.

These key learnings point to a number of ways to improve and grow as a district. LCS needs to continue to increase focus on instructional priorities rather than simply thinking of a budget in terms of bottom-line financials. The academic return-on-investment must be the central focus of the budget process. Though equity between school allocations is not a fault, it is imperative that the district creates more room to offer tailored, differentiated resources to schools and students based on their individual needs when possible. In order to support these paradigm shifts, LCS is aligning the myriad of budgeting processes for various revenue sources, including the General Fund, federal Title funds, federal Exceptional Student Education funds, and the Capital Fund. This will support the district in creating a complete picture of realignment opportunities and their strategic alignment to the instructional priorities.

In the first SFP, we projected significant budget gaps would need to be closed over the next three years

The baseline represents a projected financial picture if LCS were to make no specific new investments and spend money largely in line with prior years. The baseline is conservative and based on historical understanding of funding levels and necessary expenditures. Absent significant funding shifts, we projected that expenses would exceed revenues by a significant amount; $3.8 million in 2014-15, $7.1 million in 2015-16 and $10.4 million in 2016-17.

Through realignments we made last year, we changed our budget baseline and narrowed these gaps
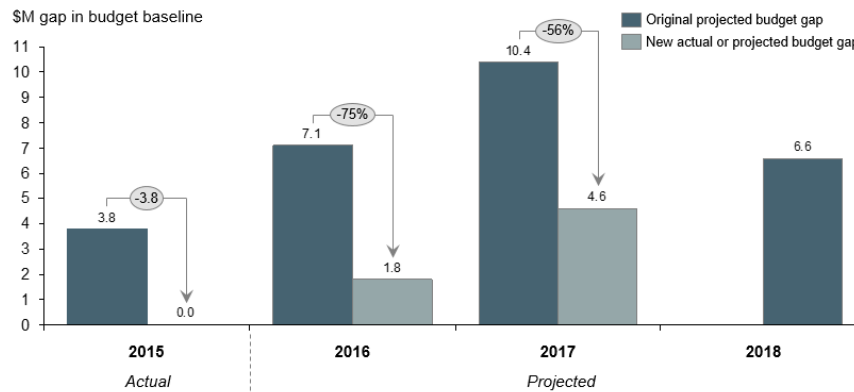
Remaining differences of $1.8M in 2016, $4.6M in 2017 and
$6.6M in 2018 represent our updated budget baseline gap

This gap is based on a number of assumptions. Overall, projections are based on historical year-to-year changes in revenues and expenses.

Specific additional revenue assumptions include the following:
- Entitlement (e.g., Title) funding is flat due to sequestration
- 2.0% increase in per-FTE state funding
- Annual increase of 500 students

Key expense assumptions include the following
- Available pool of funds for staff compensation increases by 2.5% annually
- Maintenance of reserves calculated at required 4% of total revenue

Funding the district's instructional priorities: Budget realignment

Though the listed realignment figures are estimates, LCS is committed to funding the instructional priorities

The estimated dollar savings amounts that follow are approximations based on the work of interdisciplinary district teams to project how the ideas submitted to the EngageLCS effort might be actualized. These teams considered the qualitative impacts (impact on the student experience, feasibility, degree of strategic alignment with the district's instructional priorities), as well as the quantitative figures. LCS is committing to funding these priorities over the next three years, though specific actions or figures may change over time. LCS will determine the specific actions needed to achieve these realignments over the coming months, as the district enters the 2015-2016 budget cycle.

The following areas will drive budget realignment over the plan's current three-year time horizon:

Area	Where the realignments will come from	Savings by year ($M)			
		14-15	15-16	16-17	17-18
Capital expenditure realignment	• Reassign some capital-related expenses from general fund to capital fund	2.0	2.0	2.5	2.5
High School Schedule	• Move away from a block schedule	4.6	4.7	4.8	4.9
Consolidated purchasing	• Consolidate and standardize purchasing procedures	0.9	0.9	0.9	0.9
IDEA funding	• 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)*	0.3	0.3	0.3	0
Maintenance: lawn care	• Create a lawn care team to provide lawn service to all facilities, decreasing custodial staff by attrition	0	TBD	TBD	TBD
Management discretion	• Continue to pursue additional operational and central office efficiencies	0.5	0.5	0.5	0.5
Transportation: bell schedule & software	• Increase efficiencies from implementation of routing software; bell schedules will remain unchanged and students will not share routes as projected earlier	0.2	0.4	0.4	0.4
Administrative salary	• New administrative salary schedule implementing range of pay provides incremental savings	0.3	0.4	0.4	0.4
Athletics transportation	• Reduce funding for athletics transportation	0.1	0.1	0.1	0.1
Clerical	• Consolidate clerical resources at both the central office and schools based on Skyward efficiencies and equitable allocation formulas	0	0	TBD	TBD
Guidance counselors	• Align counselor allocation ratios and responsibilities to state frameworks and best practices	0	TBD	TBD	TBD
Self-Funding PD (General/Title I and II)	• Realign current professional development funding to support instructional priorities	1.3	1.3	1.3	1.3

Details on the realignment opportunities are as follows:

Savings Opportunity Area	2014-15	15-16	16-17	17-18
Capital Expenditure Realignment[1]	• Use the capital fund to pay for some capital-related expenses currently paid for through the general fund	• Maintain this realignment for 2015-16 to maintain the savings. Increase amount by $0.5 million		
High School Schedule	• Move all high schools in LCS from a block schedule to a 6x7 schedule	• Ongoing savings from the actions in 2014-15		
Consolidated Purchasing	• Centralize purchasing process to realize greater savings	• Continue with this practice and incrementally increase savings realized		
IDEA funding[2] (Non-recurring savings)	• Strategically decrease IDEA funding annually held in reserve to yield one-time savings for three years	• No savings designated in 2017-18		
Maintenance: lawn care	• Continue exploration of lawn care services savings	• Adjust budget to reflect any identified savings; report due February 6		
Management discretion	• Determine additional operational and central office efficiencies on an ongoing, rolling basis			
Transportation: bell schedule & software	• Utilize routing software to create more efficient routes; explore two-tiered bussing	• Ongoing savings from routing software efficiencies established in 2014-15		
Administrative salary	• Established new salary schedule with ranges of pay	• Ongoing savings from action in 2014-15 with new salary schedule that includes ranges of pay		
Athletics transportation	• Reduce athletics transportation funding to schools by 25%	• Ongoing savings from 2014-15 change		
Clerical	• No action; further study of clerical roles	• Potential for savings based on Skyward efficiencies		
Guidance Counselors	• No action; assessment phase for actions in future years including review of counselors' duties	• Incremental alignment of guidance counselor ratios to match state average; ongoing review of counselors' role; report due June 30		

1. Given property value increases, LCS expects increases to the capital fund 2. This action leads to one-time savings for years 2015-16 and 2016-17; this savings will not be possible in 2018

In order to balance the 2015-2016 budget and fund the instructional priorities, the district will take action to realign approximately $8.7 million.

Realignment Opportunities		Investment Opportunities	
	2015–16	**Area**	**2015-16**
Shift of expenses out of general fund ($M)		**Baseline ($M)**	
Capital expenditures	2.0	Surplus (gap)	(1.8)
Realignments within general fund ($M)		**IP Costs ($M)**	
High school schedule	4.7	Roll forward from previous year	0.94
Consolidated purchasing	0.9	ELL and Struggling Students & Schools	(1.9)
IDEA funding (non-recurring)	0.3	Talent Development Pipeline	(1.6)
Maintenance: lawn care	TBD	Teacher Induction & Coaching	(0.4)
Management discretion	0.5	Principal Induction & Development	(0.2)
Transportation	0.4	Program Evaluation & Innovation	(0.2)
Administrative salaries	0.3	Pers. Learning (Teachers/Leaders)	(1.1)
Athletics transportation	0.1	Pers. Learning (Students)	(2.1)
Clerical	TBD		
Guidance Counselors	TBD	**Total: Priorities only**	**(7.5)**
Additional Savings		Additions: HS Testing/Super	(0.5)
Self-funding Prof. Development	1.3		
Total Savings	**10.0**	**Total including baseline gap**	**(8.7)**

Note: Some figures have been rounded; for more precise instructional priorities costs, see Appendices A-G

With the 2015-16 balanced budget as described, $4.6M in 2016-2017 and $6.6M in 2017-18 remain as budget gaps to be filled

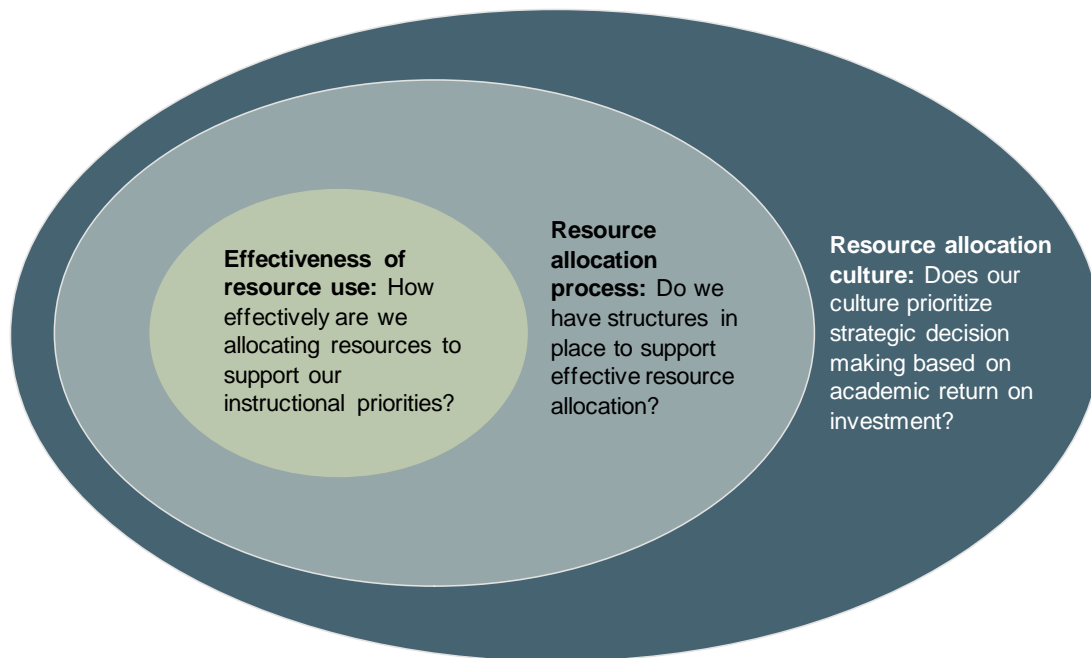**Options being evaluated to fill the future budget deficits:**

- School models: Examine magnet school models, Collegiate H.S., School Choice, CTE Academies, etc.; report from work group due June 30
- IDEA efficiencies: Pursue additional reimbursements and evaluate efficiencies of staffing placement; ongoing study needed for any changes, data available supports current status
- Skyward Systems efficiencies: Potential to reduce both supplies and staff; report due June 30 based on fuller implementation of Skyward
- District staffing: Examine roles and responsibilities of district-level positions; Report due March 30
- Central Office for district staff: Explore costs and efficiencies gained from a centralized location for district departments; report due June 30
- Consolidating Title I offices: Research completed; determined no cost saving to consolidating the two Title I offices into one location

Over-all picture over the next three years

Total savings

	Actual	Projected *additional* savings relative to previous year		
	2014-15	2015-16	2016-17	2017-18
Shift of expenses out of capital fund ($M)				
Capital expenditures	2.0	2.0	2.5	2.5
Realignments within general fund ($M)				
High School Schedule	4.6	4.7	4.8	4.9
Consolidated purchasing	0.85	0.85	0.85	0.85
IDEA funding (non-recurring)	0.33	0.33	0.33	0.33
Maintenance: lawn care	0.0	TBD	TBD	TBD
Management discretion	0.33	0.48	0.50	0.50
Transportation	0.20	0.40	0.40	0.40
Administrative salaries	0.25	0.30	0.35	0.35
Athletics transportation	0.12	0.12	0.12	0.12
Clerical	- -	--	--	--
Guidance counselors	- -	--	--	--
Other TBD ideas	- -	--	--	--
Total realignments	**8.93**	**9.18**	**9.85**	**9.95**
Additional savings ($M)				
PD self funding	1.30	1.30	1.30	1.30
Total savings	**10.22**	**10.47**	**11.15**	**11.25**

Total investments

	Actual	Projected *additional* spend relative to previous year		
	2014-15	2015-16	2016-17	2017-18
Baseline ($M)				
Adjusted Baseline Gap	3.82	1.79	4.58	6.60
Investments in Instructional Priorities ($M)				
Roll forward - previous year		0.94	1.76	(0.21)
ELL/Struggling Students	1.9	1.9	1.8	1.8
Talent Development Pipeline	1.03	1.61	1.61	1.61
Teacher Induction & Coaching	0.38	0.37	0.37	0.37
Principal Induction & Dev.	--	0.16	0.16	0.16
Program Evaluation & Inn.	0.16	0.17	0.18	0.18
Pers. Learning (T/L)	1.21	1.06	1.01	0.27
Pers. Learning (Students)	0.24	2.07	2.87	2.87
Other Investment Opportunities	-	TBD	TBD	TBD
Total IP investment	**4.94**	**7.34**	**8.02**	**7.23**
Additions: HS Testing/Super	0.53	0.53	0.53	0.53
Total investment including Adjusted Baseline Gap	**9.29**	**8.71**	**11.35**	**14.56**

Tracking progress

Each year, the SFP is organized to include evaluation of the district's resource allocation processes and outcomes against chosen metrics:

Effectiveness of resource use: How effectively are we allocating resources to support our instructional priorities?

Resource allocation process: Do we have structures in place to support effective resource allocation?

Resource allocation culture: Does our culture prioritize strategic decision making based on academic return on investment?

In each SFP, LCS progress through the last quarter of 2014 is demonstrated below based on the identified metrics:

Effectiveness of resource use
- % of budget realigned from all opportunities towards instructional priorities and baseline gap 3.2%
- % of planned realignment realized per opportunity 88%
- % of planned investment realized per priority 101%

- Successes and barriers in realizing Realignment Opportunities:

Realignment Opportunity	Current Status
High School Schedule	• Implemented 7-period day at high schools • Testing Facilitators hired • Provided before-and after-school supervision at high schools • Virtual lab facilitators hired at 8 high schools
Consolidated purchasing	• Purchasing Card Program - Approved banking agreement with Bank of America for upgrading purchasing-card rebate program paying LCS a higher percentage rebate on purchasing; working with LCS vendors to maximize rebates • Janitorial supplies - Consolidated janitorial supplies purchasing through central warehouse in 2014-15 budget process • Maintenance Inventories - Procedures being modified to reduce inventory balances as recommended in the maintenance audit
IDEA Funding (non-recurring)	• 12% IDEA fund support for multiple Instructional Priority positions implemented through the staffing plan
Self Funding Professional Development	• Repurposed Title I and Title II funds to support current Instructional Priorities

- Performance on established return metrics by priority: *Priorities will be measured at the end of the 2014-15 school year and reported to the School Board and in the next Strategic Finance Plan. Implementation of the instructional priorities did not begin until July 2014. A full year of performance is required before measurements can be completed.*

- Successes and barriers around Instructional Priorities: implementing, achieving returns, meeting program goals:

Instructional Priority	Current Status
ELL and Struggling Students	• Acceleration Resource Teachers hired and placed • Working on completion of hiring of ELL positions • Rolled out ELL initial professional development and resources • Providing cohort group and monthly professional development support for ELL
Talent Development Pipeline	• Union and Board have approved Pipeline • Developing newsletter outlining Pipeline and will provide presentations at key meetings • Will meet with Pipeline Work Group mid-year to assess progress • Will work on implementing leadership opportunities, the next component of the plan, for the next school year
Teacher Induction and Coaching Framework	• Working on completing staffing • Challenged by 328 new teachers • Training for new district instructional coaches • Planning Marzano training for coaches

Instructional Priority	Current Status
Program Evaluation and Innovation	• Hired I & PE Specialist and Analyst • Following five reviews underway: PD 360 (Edivation), ELL & Struggling Students, AVID, Achieve 3000, and Principal Induction & Training • Meeting with Instructional Priority Leads to complete metrics by 11/5
Personalized Learning for Teachers and Leaders	• 13 Florida Standards Teachers hired and placed • Schools created "Collaborative Time Plans"; support funds released to schools • Six school pilots implementing new standards through PLUS strategy • Consortium pilots implementing new standards through PLUS strategy of pooled resources
Personalized Learning for Students	• Providing training for 8 pilot schools • Established Tiger Teams to research 5 goals • Student Advisory Team implemented • Developing district website for Personalized Learning • Presentation by 8 pilot schools for Phase III funding for 12/11

Resource allocation process
- Degree to which SFP process was followed: The protocol established by the first year process was followed including priorities determined, specific tradeoffs identified, opportunities prioritized and chosen
- On-time completion of critical milestones by all district initiative teams: Teams completed milestones though one or two more support meetings via Safari Montage could have provided a stronger understanding of over-all expectations for project leads. Several leaders reported understanding pieces of the process but not grasping the whole picture of responsibilities.
- Regularly scheduled School Board updates in place for resource allocation process throughout the year: *Starting in February, the Board received monthly updates on the progress of the Strategic Finance Plan at their regular Board Meetings. Detailed briefings were provided at Board Workshops monthly.*
- Description of how a broader set of teachers, school leaders, and district leaders were involved in work of resource alignment for the year. The listing of work group members at the beginning of this document provides an overview of the magnitude of involvement. Each initiative is unique providing for varied involvement by team members.
- Solicitation of community ideas prior to drafting of SFP – Yes – Mindmixer provided way to share the LCS journey through the months of preparation of the SFP

Resource allocation culture
- 95% of principals, 25% of teachers, and 40% of community members are aware of resource alignment effort**.**
- 97% of principals, 86% of teachers, and 58% of community members see a difference in the extent to which district leadership are focusing resources on instructional priorities.
- % of district leaders proficient in using Cost/ROI tool and processes: Training will be offered during 2015 so no statistics are currently available.

Conclusion
LCS believes that this is an ambitious, courageous plan that will increase student achievement over the next three years. The district welcomes continued community engagement to make radical change and progress on behalf of the students.

APPENDIX

Appendix A: Resources for ELL and Struggling Students & Schools

As part of the EngageLCS process, LCS conducted an assessment of current resource use within the district. Based on the resource analysis and interviews with staff and administrators, the EngageLCS Leadership Team identified a need to provide additional funding for initiatives aimed at two subsets of the student population: English Language Learners (ELL) and Level 1 and Level 2 students. (Level 1 and Level 2 students are those who perform below grade level in reading and/or math as indicated by their FCAT assessments.)

Resource levels and student achievement data, when the initiative was originated in 2013-14, made a compelling case for additional support over an extended 3-5 year period:

ELL students:
- Less than 28% of ELL students scored satisfactory or above in reading on 2013 FCAT, compared to 46% of all LCS students.
- 2011-12 data from Annual Measureable Objective (AMO) data show that ELL students are not demonstrating proficiency in English language acquisition.
- 61% of ELL students graduated in 2012, compared to 75% of all LCS students.
- LCS spends 70% less in additional funding on ELL students than median of comparison districts.[1]

Level 1 and Level 2 students:
- 44% of students of Lake County schools scored as Level 1 or Level 2 on the 2013 FCAT Reading test.
- 44% of students of Lake County schools scored as Level 1 or Level 2 on the 2013 FCAT Math test.
- 51% of students of Lake County schools scored as Level 1 or Level 2 on the 2013 FCAT Writing test.
- Resources are limited for differentiating instruction for students with less than proficient FCAT scores, and schools do not apply a consistent approach in intervention.
- Despite ESE and Title I funding, administrators report that many schools still lack adequate resources to effectively support Level 1 and 2 students.

This Strategic Finance Plan recommends additional funding directed at these students in order to close the achievement gap between them and their peers.

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

Through 2014, LCS used the program evaluation and innovation process to determine which uses of these funds will bring the highest return on investment in terms of student achievement for these targeted groups. Implementation began in the 2014-15 school year based on feedback from the board, planning outcomes of the working group, and program evaluation and innovation process determination.

Rationale for Components / Activities

Data compiled in 2013-14 demonstrated that LCS spends 110% of the general education base funding per ELL student; incremental 10% equated to $600 per student. Comparison districts spent a median multiplier of 130% of their general education base on ELL students. This median incremental 30% addition equates to approximately $1900 per student. Comparison districts include: Knox County, Fulton County, Charlotte, Austin, Duval County, Prince George's County, Denver, and Marietta. (Source: Education Resource Strategies analysis, LCS data.)

District departments focused on supporting the needs of other underperforming subgroups (ESE, Title I, etc.) provided district personnel for audits, technical assistance, monitoring, support, and professional development to support these student subgroups on-site and through district outreach. There was no such department in existence and only a part-time program specialist devoted to supporting the needs of ELLs district-wide. Through the year one implementation of the SFP in 2013-14, an ESOL Program Specialist was added and four ELL School Specialists to strengthen the district-wide infrastructure and systems. Twenty-two Acceleration Resource Teachers were also hired and provided to schools with 48% or more Level 1 and 2 students to work directly with students, teachers, and the school-based leadership team.

Timeline

Selected programs initiated for the 2016–18 school years include the following:
- Maintaining the existing district staff and Acceleration Resource Teachers to provide targeted support to ELLs and Struggling Students & Schools.
- Continuing ongoing professional development to build the capacity of administrators, teachers, and paraprofessionals district-wide.

Costs

The district allocated approximately $1 million to each of these two sets of programs in each of the three coming school years, for a total of $6 million by 2017-18. The district determined precisely how to direct these funds through the program evaluation and innovation process.

Item	2016 Estimated Cost	2017 Estimated Cost	2018 Estimated Cost
1 ESOL Program Specialist @ $66,171 for 216 days Salary & Benefits	66,171	66,171	66,171
1 Secretary II @ $38,722 for 247 days Salary & Benefits	38,722	38,722	38,722
4 Regional ELL School Specialists @ $55,386 for 196 days Salary & Benefits	221,544	221,544	221,544
21 School-Based Acceleration Resource Teachers @ $55,386 for 196 days Salary & Benefits	1,163,106	1,163,106	1,163,106
15 Paraprofessionals to support literacy for 30 hours a week @ $14,508	217,620	217,620	217,620

Substitutes for professional development	71,098	50,000	30,000
Supplies/materials for professional development	50,000	30,000	10,000
Program Cost and Consultants	50,000	20,000	10,000
In and Out-of-County Travel	10,000	10,000	10,000
Total Cost	**$1,888,261**	**$1,817,163**	**$1,767,163**

Return Metrics

Return Metrics

Goal: Outperform State Targets	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	State Target AMO Reading 2018	District Target AMO Reading 2018
English Language Learners	49	49	56	60	62	70	TBD	72

Goal: Decrease Amount	District Reading 2012	District Reading 2013	District Reading 2014	District Reading Target 2015	District Reading Target 2016	District Reading Target 2017	District Reading Target 2018
Level 1&2 Students	44	44	43	30	26	22	18

Goal: Increase Achievement	District Reading 2012	District Reading 2013	District Reading 2014	District Reading Target 2015	District Reading Target 2016	District Reading Target 2017	District Reading Target 2018
Lowest 25%	66	61	66	70	70	75	75

Goal: Increase Achievement	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	District Reading Target 2018
Graduation Rate (All Students)	75	78	80	85	90	95	95
Grad Rate (ELL)	61	57	62	70	80	90	95

Appendix B: Talent Development Pipeline

Need

In the past, Lake County School District's compensation system has not rewarded teachers for excellence in the classroom, nor has it recognized that some instructional positions require different skill sets. This approach did not optimally support increased student achievement, nor does it fully recognize teacher quality. This strategy will reward the most effective teachers in the district and increase effectiveness and impact of instructional leaders in order to drive student achievement.

Objectives

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

Components / Activities

A committee involving representation from a variety of stakeholders was formed to collaborate and collectively develop the framework for this initiative. The Leadership Initiatives for Teachers (LIFT) committee began by meeting regularly from late August through early October of 2013. The committee started by reviewing sample career ladder plans used in other Districts and/or States. These included:

- District of Columbia Public Schools, Leadership Initiative for Teachers (LIFT) (2012-2013)
- Georgia Career Ladder Framework (May 2012)
- Union High School District, Avondale, Arizona, Career Ladder Handbook (2007-2008)
- Lake County Schools, Professional Advancement for Career Teaching (PACT) – (March 2004)

Plans were discussed and highlights from each listed in a compare/contrast chart. The LIFT for LCS Career Ladder was constructed using sound research (the best from each plan). The bulk of LIFT for LCS is based on the philosophy and structure of the District of Columbia Public School Plan.

From here, a plan leading from teacher to School-Based Administrator was discussed. Research for Principal Pipeline Development plans included:
- Lake County Schools, Pathways to School Leadership (In the revision process)
- Charlotte-Mecklenburg Schools – August 2012
- Denver Public Schools – August 2012
- Gwinnett County Public Schools – August 2012
- Hillsborough County Public Schools – August 2012
- New York City Department of Education – August 2012
- Prince George's County Public Schools – August 2012
- Maricopa Education Services Agency (Six School Districts in Arizona)
- Charleston County School District, SC

Research from these plans was utilized to develop a career ladder for School-Based leaders, which is a continuum from the teacher career ladder plan

Finally, a District Staff pathway was discussed. Much discussion was held on this pathway. The committee agreed that a new step for Lead Program Specialist and/or Program Manager needed to be added. After a review of our current system, a career path along with eligibility requirements at each level was developed for careers at the District level.

From here, the framework was taken to the LCS School Board and the LCEA Negotiations Committee for approval. Once approved, a variety of communication modes were developed to inform staff about the initiative. These include:
- A LIFT for LCS Newsletter that will be sent to all staff
- A voice-over PowerPoint explaining the LIFT for LCS framework and how it will be implemented available for all staff
- Numerous presentations at Principal's and Assistant Principal's meetings

Once Summative Evaluations for the 2013-2014 school year are finalized, LIFT for LCS will be implemented.

Rationale for Components / Activities

Traditionally, many teachers have found that the only way to advance in their careers is to leave the classroom. The LIFT for LCS changes that. LIFT is a five-stage career ladder that provides high-performing teachers with opportunities for advancement inside the classroom, as well as additional responsibility and increased recognition and compensation. At its core, LIFT is about honoring teachers as professionals, and making DCPS a place where teachers at any point in their careers can continue to learn and grow in an environment where they are respected and appreciated.

Timeline

LIFT for LCS will be implemented during the 2014-2015 school year.

Costs

Item	2016 Estimated Cost	2017 Estimated Cost	2018 Estimated Cost
Manager of Employee Compensation and Evaluation Salary and benefits	92,000	92,000	92,000
Compensation and Evaluation Analyst Salary and benefits	87,000	87,000	87,000
Bonus/Supplements for HE and E teachers	850,000	850,000	850,000
Recruitment Bonuses	180,000	180,000	180,000
Critical Shortage Bonuses	100,000	100,000	100,000
Leadership Opportunities	300,000	300,000	300,000
Total Cost	**$1,609,000**	**$1,609,000**	**$1,609,000**

These metrics focus on retaining highly effective teachers, incentivizing teachers and administrators to work in low-performing schools, and positive responses to a teacher survey.

Return Metrics	2013-14 Baseline	2014-15	2015-16	2016-17
% of teachers with positive value-added measures (VAM)	TBD	81%	82%	83%
Increased retention rate of Highly Effective teachers (% of teachers retained annually)	TBD	70%	78%	86%
Higher turnover of ineffective teachers (% who leave the district voluntarily annually)	TBD	2%	3%	5%
Increased teacher transfer rates from low-need schools to high-need schools	TBD	2%	3%	5%
% of administrators reporting that the pipeline helps to retain effective teachers	TBD	65%	75%	90%
% of teachers reporting that the pipeline contributes positively to motivation to improve instructional practice	TBD	65%	75%	90%

Appendix C: Teacher Induction and Coaching Framework

Need for this Program

Each year, more than 10% of the district's teaching staff is new to the profession. In 2012–2013, new teachers were supported on a 1:73 coach-to-teacher ratio. Due to the high ratio, new teachers had only brief contact with their district instructional coaches, and intensive support was provided only in critical situations. Through this priority, coach-to-teacher ratios are now 1:30. The district has also lacked a consistent protocol for training district and school-based coaches across departments. Teachers do not always receive the support and feedback needed for the growth and development of effective instructional practices. In addition, the district has not implemented a consistent process for new teacher mentorship at schools. Through this instructional priority, the district will be able to provide focused support for new teachers, allowing them to grow in the profession and support them in helping their students gain higher achievement. A strong district-wide framework for training all coaches is needed.

Objectives

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

Components / Activities

The instructional priority is focused on providing focused professional development for district and school based coaches supporting new teachers, maintaining effective teacher-to-coach ratios, and building capacity and sustainability for effective instructional practices of new teachers that impact student learning outcomes.

Professional development will focus on research-based practices for effective mentoring and coaching practices. Collaborative partners for the professional learning include the New Teacher Center and Marzano/Learning Sciences International. During the 2014-2015 school year, there are eleven (11) scheduled days of professional learning. Effective coaching practices will be shared through various district professional learning opportunities.
Due to new district instructional coaches hired through this priority, coach-to-teacher ratios are currently 1:30 for first-year teachers, and 1:50 for second-year teachers. Coaches are assigned based on the feeder patterns, allowing for a consistent level of support across schools. New teachers receive an average of 30-45 minutes of coaching support each week, based on their individual needs. The district coaches are working collaboratively with school leadership teams to build a culture of coaching at all schools.

The focus for coaching and mentoring support is based on the Marzano Instructional Framework as it is our language of instruction. Coaches work with new teachers to learn the framework through the implementation of the Florida Standards utilizing the tools and resources developed by Lake County Schools. The coaches also monitor new teacher participation at required and recommended training events, as well as guide them through the certification process.

The desired result of this instructional priority is to improve teacher effectiveness that impacts student learning outcomes and results in higher teacher retention rates and over-all more effective instruction.

Additionally, a strong district-wide framework for training all coaches and developing a common language will be a priority.

Rationale for Components / Activities

Research is clear that the most important factor in improving student achievement is the quality of the teacher in the classroom. Having 350-400 new teachers each year is counterproductive to building capacity for a highly effective instructional staff. Implementing a teacher induction and coaching framework that is grounded in research-based practices will help Lake County develop the capacity for sustainable change for effective instructional practices that impact student learning.

Effective teachers need effective coaches. Through focused and ongoing professional development, instructional coaches and school-based content coaches will develop the common language and skilled practices that guide effective teacher induction and coaching. According to the New Teacher Center, effective teacher induction programs provide coaching and support to new teachers during their first three years in the classroom. Expanding the district instructional coach team allows for this intensive level of induction support that focuses on developing coaching practices around common protocol for all district coaches and supports over-all teacher effectiveness.

Timeline

The Teacher Induction and Instructional Coaching initiative launched in the fall of 2013 as a pilot project supporting teacher induction for 75 first-year teachers. In the fall of 2014, additional district instructional coaches were added to provide teacher induction support for all first and second year teachers. Through ongoing training and school-based collaborative efforts, support for third year teachers will be provided beginning in fall 2015.

Costs

Item	2016 Estimated Cost	2017 Estimated Cost	2018 Estimated Cost
Program Specialist Salary and benefits	67,000	67,000	67,000
District Coaches Salary and benefits	166,000	166,000	166,000
Consultant Fees	100,000	100,000	100,000
Prof. Dev. Costs	18,000	18,000	18,000
Prof. Dev. Materials	5,000	5,000	5,000
Online Coaching Tools	11,000	11,000	11,000
In-County / Coaches	5,500	5,500	5.,500
Supplies for Coaches	500	500	500
Total Cost	**$373,000**	**$373,000**	**$373,000**

Return Metrics

Return Metrics	2014-15	2015-16	2016-17	2017-18
% of Effective teachers retained	73%	75%	77%	79%
First-year teacher value-added measures (VAM)	Waiting for compilation of 2013-14 scores to create 2015 baseline			
First-year teacher instructional practice scores	3.01 (Effective)	3.10	3.20	3.30
% of first-year teachers rated Effective or Highly Effective	93%	95%	97%	99%

Appendix D: Principal Induction and Development

Need for this Program

The Principal Induction and Development Program is a structured approach to increase support, build capacity and retain high quality principals. This collaborative process will engage new principals in a one-on-one relationship with the principal coach designed to support the principal's professional and personal development.

Objectives

o Ensure that principals receive in-depth coaching support during their first two years.
o Improve the level of coaching given to all principals and potential principal candidates through professional development, one-on-one mentoring, and professional learning communities.

Components / Activities

The program will feature structured modules for each cohort: Targeted APs, first-year principals, second-year principals, and 3+-year principals. This program will be a blended partnership between the district and the National Institute for School Leadership (NISL), a training organization that specializes in executive development. A new position, Mentor Principal Coach, will ensure high standards of implementation fidelity and sustainability of this program (see job responsibilities below). The program includes professional development for all principals and targeted assistant principals who will serve as principal interns.

Role of Principal Coach		
Program Oversight / Implementation	**Professional Development**	**Field Work**
•Coordinate site-based mentor relationship •Coordinate Principal Mentor cohort groups •Organize professional development •Coordinate New Principal Academy (3 days) •Establish documentation and support materials •Ensure program infrastructure, fidelity & sustainability	•Train principal mentors using train-the-trainer model in partnership with the National Institute for School Leadership •Coordinate New Principal Induction Academies quarterly during phases 1 and 2 •Establish modules/ work sessions •Align principal induction program with other district professional development offerings	•Meet with new principals weekly or bi-weekly; perform joint school walk-throughs •Provide coaching feedback •Meet with experienced site-based principals to sustain relationships and align support •Conduct professional development follow-up

With 40 percent of U.S. school principals reaching retirement age in the next decade, the increasing complexity and pressures of the job, and a growing student population, school districts are seeking new ways to support, grow and retain effective principals. One solution has been to provide mentors and principal coaches for new administrators in order to provide direct campus connect for capacity building activities and conversations.

Timeline

2014 and Beyond

Costs

Personnel costs for Principal Induction are salary and benefits for the Principal Mentor Coach. Non-personnel costs include costs for professional development, measurement and evaluation costs for principal and staff surveys, and the cost of principal time in training activities. Costs are further detailed in the graph and table below.

Cost items	2016 Estimated cost	2017 Estimated cost	2018 Estimated cost
Program costs			
Mentor coach salary and benefits	106,000	106,000	106,000
District professional development	9,300	9,300	9,300
Travel for professional development	1,100	1,100	1,100
Materials / equipment for new hires	4,100	400	400
Stipend for principal mentors	3,000	3,000	3,000
Measurement / evaluation costs	25,000	25	25,000
Ancillary costs			
Utilities for extra space	600	600	600
Incremental use of existing resources			
Phase 1 principal time	6,100	6,100	6,100
Phase 2 principal time	4,900	4,900	4,900
District director time	1,400	1,400	1,400
Total	**$161,500**	**$157,800**	**$157,800**

Return Metrics

Return Metrics	2013-14 Baseline	2014-15	2015-16	2016-17
% of principals receiving a 4.0 or above on LEADS Principal survey	TBD	TBD	TBD	TBD
% of principals rated Highly Effective on the LEADS evaluation	19%	21%	27%	35%
% of principals rated Effective on the LEADS evaluation	81%	75%	70%	65%
% of principals whose FLDOE school grade is an A or B	62%	67%	75%	80%

These metrics will evaluate principals on feedback from teachers, performance on principal evaluations, and entire school performance. Both the LEADS survey and the LEADS evaluation are measures of scoring principal performance and are within a principal's locus of control. On the other hand, the school grade is more of a cumulative metric that measures some factors outside of a principal's locus of control. Nevertheless, as the instructional leader of a school, a principal should be evaluated on the performance of the school itself, and it is appropriate to incorporate school performance into the evaluation of the principal induction program.

Appendix E: Program Evaluation & Innovation Process

Need for this Program

Student achievement depends upon the effectiveness of instructional programs. Lake County Schools previously had no clear, standardized process for evaluating operational and academic return on investment (ROI) for promising programs and current student initiatives. The district defines the academic ROI of instructional programs as the growth in academic achievement of LCS students. For operational programs, the ROI may be expressed in terms of efficiency or effectiveness in conducting the day-to-day operations of the district. The Program Innovation and Evaluation initiative provides a clear process to eliminate or retool ineffective programs and continue fund and provide resources for promising and effective programs. The process identifies, evaluates, implements, tracks, and reassesses programs.

Objectives

- 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.
- 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.
- Develop a culture of data-driven decision making through implementation of this process.

Components / Activities

The process will proceed as follows:

At the center of the process is a tool the district has designed to measure and compare the cost and operational and academic ROI of selected programs. The Cost/ROI tool was created to be versatile enough to evaluate both new and existing programs that are either instructional or operational. It facilitates the projection of comprehensive costs of a program, including direct program costs, ancillary costs, incremental costs due to the use of existing resources, and cost relief the program affords. The tool supports the tracking of impact evaluation against both a baseline performance level and a projected target.

The new Program Innovation and Evaluation staff now meets with the leaders of instructional priorities and targeted programs for evaluation to develop and verify performance metrics, all associated costs, implementation details and reporting. The staff continues to develop the system of operation for this initiative.
What is the rationale for these components/activities? (This is written in paragraphs and gives a detailed understanding of the rationale for the particular components and activities that are being implemented)
This process will allow the district to:

- Proactively examine promising programs and assess projected impacts on student achievement and operations
- Gather full program implementation costs
- Support fidelity of implementation of programs through rigorous monitoring
- Align spending to the district's instructional priorities and Strategic Finance Plan
- Compare different programs with similar objectives based on ROI

This process will allow the district to:
- Proactively examine promising programs and assess projected impacts on student achievement and operations
- Gather full program implementation costs
- Support fidelity of implementation of programs through rigorous monitoring
- Align spending to the district's instructional priorities and Strategic Finance Plan
- Compare different programs with similar objectives based on ROI

Timeline

Initially, the district used this process to address two instructional priorities: new programs for English Language Learners (ELL) and Level 1 and Level 2 students to develop the program and budget for the 2015 year. Since hiring the Program Innovation and Evaluation staff, this priority is fully underway t support the district's decision-making structure.

Costs

Item	2016 Estimated Cost	2017 Estimated Cost	2018 Estimated Cost
Program Innovation and Evaluation Specialist Salary and Benefits	89,897	92,565	95,253
Program Innovation and Evaluation Analyst Salary and Benefits	73,801	75,985	78,176
Professional Development- Support	3,000	3,000	3,000
Statistical Software	3,000	3,000	3,000
In-County Travel	3,000	3,000	3,000
Out of County Travel	1,500	1,500	1,500
Supplies and Materials	500	500	500
Total Cost	**$174,698**	**$179,500**	**$184,429**

Return Metrics

Indicator	2014-2015	2015-2016	2016-2017	2017-2018
Program Evaluation of Instructional Priorities	7 Program Evaluations	7 Program Evaluations	7 Program Evaluations	7 Program Evaluations
Program Evaluations on additional high profile/high investment programs	4 Program Evaluations	5 Program Evaluations	6 Program Evaluations	7 Program Evaluations
Cost savings as a result of program evaluations	$25,000	$50,000	$100,000	$150,000
Percentage of Return on Investment (ROI) calculations determined to be positive returns.	60%	75%	90%	90%
Percentage of identified performance metrics for monitored programs showing improvement	50%	65%	75%	80%
Stakeholder satisfaction regarding integrity of evaluation process	100%	100%	100%	100%
Stakeholder satisfaction related to effectiveness of program monitoring	100%	100%	100%	100%

Appendix F: Personalized Learning for Teachers and Leaders

Need

LCS will focus on growth areas directed towards optimizing time for teacher collaboration, teacher engagement in meaningful professional development using a variety of modalities, and building capacity at the leadership level to embrace and support innovative professional development on a continuing basis.

Objective

- Objective #1:   Ensure all teachers have ample time within the school day for collaboration (without sacrificing quality student learning) focused on core instructional work
- Objective #2:   Provide multi-modal access to high-quality PD content based on teachers' needs and student results
- Objective #3:   All teachers have frequent opportunities and multiple sources of feedback on their instructional practice
- Objective #4:   Assess the impact of PD content/experiences

Components / Activities

Objective #1: Ensure all teachers have ample time with the school day for collaboration (without sacrificing quality student learning) focused on core instructional work

The data indicates that teachers need time to collaborate and develop the skills to implement the new Florida Standards with rigor while also implementing personalized learning for students in the classroom. To address the challenge of teacher time and support, the district needs to focus on school redesign.

We will optimize resources to provide significant release time during the school day for teachers to collaborate and plan. This includes creating a new system for allocating personnel to schools and recreating master schedules that fit the new allocations.   We have already begun to address this redesign opportunity through our work with the TimeWise process that prepared middle and high school pilots to launch in 2014-15. These pilots are using PLUS Teams to push into the classroom so core academic teachers are released for collaborative planning time. We will extend this work to other schools in 2015-16. By the end of the grant initiative we expect that regular collaborative time for core academic teachers will be the norm at all middle and high schools. Additionally, we will move this work to the elementary schools during this same period of time.

Objective #2: Provide multi-modal access to high-quality PD content based on teachers' needs and student results

Also indicated by the data, teachers would like more support in their work preparing lessons and reviewing student work. We need to use the time provided through resource optimization for collaborative planning that will allow teachers to work in teams. Teacher engagement and effectiveness through teacher input and ownership of their learning is key to teacher success. We plan to bring teachers together in regular collaborative sessions targeting the new Florida Standards using LDC, PLCs, Lesson Study and ECET2 Colleague Circles. We will also focus on PD that will support teachers in delivering lessons through blended learning for all high schools and middle schools by 2016-17. Because this can help optimize classroom time and master schedule redesign related to Outcome #1, it is foundational content. We will establish expertise in AVID's WICOR (Writing, Inquiry, Collaboration, Organization and Reading) strategies by sending three PLUS Team members to training for six school each year of the grant.

Over time all LCS schools will use regular collaborative time to support professional development. Teachers will be using LDC, MDC and blended learning as strategies that have been developed over the course of the project to enhance teacher effectiveness.

Objective #3: All teachers have frequent opportunities and multiple sources of feedback on their instructional practice

We will incorporate a variety of strategies to give teachers better feedback on their teaching:
- Student surveys
- ECET2 teacher interviews
- Coaching Framework enhancement to provide new teachers with individual support for their first two years of teaching
- Deepening feedback for the Teacher Evaluation & Achievement Model (TEAM) through training of coaches on the Marzano model.

Objective #4: Assess the impact of PD content/experiences

As the district provides embedded PD time for teachers and supports for their work, we hope that this will empower teachers to move from compliance to passion in teaching. This will require that we provide leadership training for district, school and teacher leaders so we can implement this change in a well-managed full-system transition.

We will use teacher and leader surveys to assess involvement of teachers. This will allow us to ascertain the quality of PD, the interface between PD and individual teacher's goals and the mixture of strategies and structures that have the highest teacher engagement.

Rationale for Components / Activities

We need to help teachers meet multiple challenges they face in dealing with new standards and changing classroom expectations. This initiative will allow LCS to integrate a system of supports and professional learning for teachers that will empower them as they develop more effective teaching practices.

This initiative will provide development opportunities for teachers by creating collaborative time for teachers using a Lesson Study format, supporting the development of Literacy Design Collaborative and Math Design Collaborative modules and providing teachers with multiple forms of feedback on their teaching practice.

Timeline

The new Innovative Professional Development (iPD) Grant will provide intense support during the next three years for middle schools and high schools while district funds will support elementary school level development. Using the Personalized learning for Teachers and Leaders initiative resources in conjunction with the iPD initiative will form a seamless approach to redesigning professional learning in the district. Following the three year grant timeline, the SFP will project funding to support ongoing efforts within the redesigned system.

Costs

Item	2015-2016	2016-2017	2017-2018
1 Innovative Learning Specialist for 215 days-Salary and Benefits	63,695	63,695	63,695
1 IT Support Tech for 12 month-Salary and Benefits	54,069	54,069	54,069
13 Florida Standards Teachers for the Middle and High Schools for 196 days @ $55,386 – Salary and Benefits	720,018	720,018	0
Substitutes to provide collaborative planning time for teachers	125,000	$75,000	$50,000
Software to support personalized learning	100,000	$100,000	$100,000
Total Cost	**$1,062,782**	**$1,012,782**	**$267,764**

Success of the personalized learning initiative will be mostly centered on teacher effectiveness ratings, teacher feedback as a proxy for culture change in the district, and participation rates in new online PD modules. Detailed metrics for personalized learning are outlined below.

What are target performance returns?

Metric	'15	'16	'17	'18
Teacher effectiveness ratings				
Value-added measures (VAM)				
Feedback from teacher survey	Metrics being revised to coordinate with Innovative Professional Development (iPD) grant evaluation			
Usage rate for professional development software				

Appendix G: Personalized Learning for Students

Need

Throughout the district, LCS students have a wide variety of starting positions in terms of academic achievement. A one-size-fits-all approach does not meet the diverse needs of students. By personalizing instruction in a student-centered classroom, the district can tailor its approach to the academic needs of students to increase student achievement.

Vision / Objective

Five strategic goals have been established for personalized learning for students. They are:
1. Encourage student-directed learning
2. Develop and implement learner profiles and individual paths to mastery for each student
3. Establish a system of competency-based progression
4. Establish flexible learning environments
5. Develop a system of accountability and continuous improvement

Components / Activities

We have developed a detailed strategic plan for the district for the successful implementation of personalized learning. Our plan calls for a gradual scale-up implementation of 4-6 schools per year, with a goal of being fully personalized by 2022. In order to begin the work, eight schools were selected as our first cohort, and for the past five months, they have been in the process of exploring personalized learning. As a result of research, travel to districts and/or schools that have recently implemented personalized learning, and training/coaching with personalized learning coaches, each of the eight schools has envisioned an implementation strategy for their school. The next phase of the work begins with the eight schools presenting their plans to district staff to determine school readiness to move forward. Those schools selected to move forward will being the work of deeper planning (from Jan – August 2015) and then implementation of their plan during the 2015 – 16 school year.

Rationale for Components / Activities

As the move to personalized learning is transformational, we felt it was important to scale up gradually. In addition, we felt it was important that each school have a level of autonomy in determining the best implementation strategies and timelines for their individual schools. To facilitate schools' learning process and professional development around personalized learning (PL), funds were made available (through a grant from the Bill and Melinda Gates Foundation) to visit PL schools and districts around the nation, and also to engage personalized learning experts to provide coaching and training for school staffs.

Timeline

The timeline for implementing personalized learning district-wide is estimated to be eight years. The scale up calls for 4–6 schools to come onboard each year in two phases of work: one cohort will be spending a year planning for their implementation while the other cohort begins the implementation after having completed a planning year. In this way we'll be building capacity.

Item	2016 Estimated Cost	2017 Estimated Cost	2018 Estimated Cost
Administrator on Special Assignment to oversee the work Salary and Benefits	107,000	107,000	107,000
3 Innovative Learning Specialists for 215 days Salary and Benefits	191,085	191,085	191,085
Fiscal Assistant Salary and Benefits (Half-time)	20,000	20,000	20,000
Planning funds for each of six schools ($25,000 per school)	150,000	150,000	150,000
Implementation funds for each of four schools ($400,000 per school)	1,600,000	2,400,000	2,400,000
Total Cost	**$2,068,085**	**$2,868,085**	**$2,868,085**

LCS is committed to achieving efficiencies through technology in the following ways: For any period of implementation, the program will achieve enough efficiencies to be cost neutral in four years. Therefore, this document refers to the program as being "self-funding" in nature. This projection is based on an estimate from the Bill and Melinda Gates Foundation. For purposes of developing an initial financial model, the district estimates a straight-line schedule of achieving self-funding (0% in year 1, 33% in year 2, 67% in year 3, 100% in year 4). Since implementation of personalized learning will be staggered across a number of years, this self-funding aspect will apply on a school-by-school basis and will not be applicable at a district level. Using this implementation schedule, approximately $270,000 of costs will be self-funded in 2017.

Return metrics

Since the primary goal of personalized learning for students is to improve academic achievement and prepare all Lake County students to be college/career ready, success criteria for the strategies above would include measures that are typically analyzed to determine student achievement, including: growth in TEAM/LEADS evaluations, and measureable increases in student academic achievement and state summative assessments. However, the effect of personalized learning on many of the summative metrics will take a long time to track and assess. Therefore, in these initial years, the district plans to track the following metrics as leading indicators of success:

Metric	'15	'16	'17	'18
Student feedback on survey		Metrics being revised to coordinate with Next Gen Grant evaluation		
Student formative assessment scores				