



WORK GROUP REPORTS

2015-16 Budget Recommendations

Final Report for the Strategic Finance Plan
Submitted to the Lake County School Board
April 27, 2015

Introduction

April 20, 2015

The Strategic Finance Plan has its goal the aligning of resources to support key initiatives directed at teachers, leaders and students to develop students who are “C²Ready” – prepared for college and a career. January 12, 2015, the Lake County School Board adopted its second Three-Year Strategic Finance Plan (SFP) to support this mission. With the approval, the SFP guides our annual budgeting process to ensure our instructional priorities are being funded and budget gaps are closed.

This document provides the recommendations for the district’s budget that align with the opportunities outlined in this SFP. It earmarks an investment of approximately \$23 million for the district’s instructional priorities through 2018. These priorities will support long-term success for students, with the following projected costs for 2015-16:

- Programs for English Language and Struggling Students: \$2.0 million
- Talent Development Pipeline: \$1.6 million
- Teacher Induction and Coaching: \$0.4 million
- Leadership Advancement: \$0.2 million
- Program Evaluation & Innovation: \$0.2 million
- Personalized Learning for Teachers and Leaders: \$1.0 million
- Personalized Learning for Students: \$1.0 million

In addition to funding these priorities, the district has anticipated a significant budget gap for 2015-16 of approximately \$1.8 million. The SFP projects closing this gap as well as funding the priorities for a total of \$7.7 million.

The resource realignment strategies earmarked by the SFP for 2015–2016 comprise the following activities:

- Continuing the 6 X 7 schedule for our high schools
- Continuing the centralizing and consolidating of purchasing practices
- Strategically reducing our IDEA funding reserve over three years
- Reassigning some capital-related expenses from the general fund to the capital fund
- Outsourcing athletic field maintenance through a bid process
- Continuing our new transportation routing software and adding efficiencies
- Continuing funding for athletics travel more parallel to costs in other Florida districts
- Continuing implementation of the new administrative salary schedule
- Allowing for additional management decisions to drive continuing operational efficiencies

An amazing array of discoveries and major steps have occurred over the last nine months of focus on implementation. Following is a summary of each of our initiatives:

ELL and Struggling Students – The English Language Learners (ELLs) and Struggling Students initiative targets school needs for additional ELL support and provides assistance to those with the greatest number of Level 1 and Level 2 students by providing Acceleration Resource Teachers (ARTs) and Literacy

Teacher Assistants (TAs). Acceleration Resource Teachers (ARTs) work with students while delivering model lessons on a regular basis so teachers can grow in best practice while their students are provided special support. In addition, this instructional priority focuses on developing district-wide infrastructure to support ELLs and Struggling Students. Increased support has been phased-in this years to provide additional professional learning opportunities, on-site technical assistance and resources.

Talent Development Pipeline – In August 2014, the Talent Development Pipeline (LIFT for LCS) was negotiated and approved as part of the LCEA Contract for the 2014-2015 school year. In Year 1 supplements were given to both classroom and non-classroom teachers working in Title I schools with at least two years of Effective or 1 Highly Effective TEAM Summative Evaluation. Additionally, teachers in critical shortage areas defined in the LIFT for LCS plan received bonuses. To prepare for the 2015-2016 school year, a communication plan has been developed and is being implemented in April. Additionally, the committee will reconvene to determine any revisions or modification needed, and when leadership opportunities should be implemented.

Teacher Induction and Coaching Framework – During year two of this project, support for 440 new teachers has been provided. The 2014-15 project plan included a case load of 20-25 new teachers per district instructional coach. Due to the continued increase of new teachers during the 2014-15 school year, the case load is actually 25-30 new teachers per coach. In addition to providing site-based coaching support, the district instructional coaches are providing all teacher induction training (i.e., New Teacher Orientation, Professional Ethics, PEC Portfolio, and Classroom Management).

Leadership Advancement – The launch of this initiative will occur 2015-16.

Program Evaluation and Innovation – The Program Evaluation and Innovation Specialist and Analyst initiated program evaluation for all of the EngageLCS priorities and four additional targeted areas that include Achieve 3000, Edviation (formerly PD 360), AVID and PreK reading programs. Initial work on the Edviation review resulted in a savings of \$84,875 for the district, already surpassing the Program Evaluation and Innovation metric for providing cost savings for 2015. Protocols and expectations for program reviews have been and will continue to be implemented to embed this process in the culture of the district, thereby increasing the effectiveness and efficiency of the district on a continuous basis. Program reviews will be presented throughout the spring and summer as they are completed.

Personalized Learning for Teachers and Leaders – Personalized Learning for Teachers and Leaders is the instructional priority that couples with the innovative Professional Development (iPD) grant that has been awarded to our district by the Bill and Melinda Gates Foundation. We have five goals for successful implementation: (1) Learner-directed learning, (2) Learner profiles and individual paths to mastery, (3) Competency-based progression, (4) Flexible learning environments, and (5) Accountability and continuous improvement. The outcomes of our iPD grant align with our goals for successful implementation of Personalized Learning for Teachers and Leaders. By providing ample time for teachers to collaborate during the school day, our Florida Standards Teachers along with other academic coaches embed professional learning into collaborative time keeping in mind personalization. Our district is exploring various forms of multi-modal access to high-quality professional development content based on teachers' needs and student results. We have refocused the original IT Tech Support position into a Digital Content Systems Architect to support the need this for multi-modal access. Providing teachers with frequent opportunities and multiple sources of feedback on their instructional practice will also support personalization of professional development opportunities. Assessing the

impact of professional development content and experiences will allow us to continue to adjust our efforts for continued support for this instructional priority.

Personalized Learning for Students – The EngageLCS initiative is integrated with the Next Gen Systems grant process. As we move into Phase III of the Next Gen Systems grant, expected to begin in May 2015, we anticipate 4 – 6 of our eight pilot schools to move forward into launch this fall, with significant funding provided through the grant. We will then start our scale-up by inviting interested schools to apply to begin the planning phase. Our scale up calls for 4 – 6 schools to launch each year, while another 4 – 6 schools begin their planning year each year.

High School Schedule – The district moved away from block scheduling and implemented a 6 X 7 schedule for 2014-15 for high schools. This will be the schedule in 2015-16 providing ongoing savings for this realignment opportunity.

Consolidated Purchasing – The district will continue to add to efficiencies by reducing maintenance inventories, increasing amount of payments made with district Purchasing Cards and consolidating janitorial supply purchasing through the central warehouse.

IDEA Funding/Efficiencies – The district will continue to use ongoing IDEA reserves and funding designated for prevention for appropriate instructional priorities.

Maintenance: Lawn Care – The original plan to form lawn care teams for multiple schools did not create estimated savings. The district will move forward with a plan to outsource athletic field maintenance through a bid process.

Management Discretion – The Leadership Team is identifying reductions that can be made with minimal disruption to the system.

Transportation Software – The routing software makes greater efficiency possible, and these savings started to be realized in 2014-15. We anticipate additional savings for 2015-16.

Administrative Salaries – The new Administrative Salary Schedule has been implemented for 2014-15. The savings will be tracked yearly and provide ongoing realignment support for the instructional priorities.

Athletics Transportation – The reduction in funding during 2014-15 more closely aligns this district cost with other Florida school districts. The reduction started in 2014-15 will continue in 2015-16.

Clerical – This initiative is in a research phase. Recommendations will be made once Skyward is more fully implemented. A report is due from the Work Group on June 30, 2015.

Guidance Counselors – The school allocation formula has been adjusted to move towards equity for school sites.

Our goal has been to focus on the instructional priorities and realign resources so they are moved into the regular budget for 2015-16 and can continue to be implemented. The following pages outline the work plans for the opportunities identified in the SFP. Each of the Work Groups has submitted a plan that builds on the initiatives outlined in the SFP and includes a detailed budget for 2015-16. The

document also provides a high-level look at the balancing of the budget between instructional priorities and realignment opportunities.

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

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Instructional Priority- ELL and Struggling Students & Schools

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

Working group membership:

- Robin Neeld (Title III Program Specialist)
- Jeanette Tietjen (MTSS Program Manager)
- Rehana Insanally (Differentiated Accountability Program Specialist)
- Liz Bourdon (Director, Federal Compensatory Education)
- Judy Miller (Director, Exceptional Student Education)
- Carmen Arnold (Director, Curriculum and Instruction, Elementary)
- Bonita Blair (AP Literature and Composition Teacher, East Ridge High School)
- Rob McCue (Principal, South Lake High School)
- Barbara Longo (Principal, Oak Park Middle School)
- Leah Fischer (Principal, Seminole Springs Elementary School)

Working group objectives/goals to support C² Ready students:

1. Increase student achievement for ELL students and Level 1 and Level 2 students
2. English Language Learners: Fund programs aimed at closing the achievement gap of English Language Learner students
3. Struggling Students & Schools: Inject additional resources to support struggling students and schools in order to help increase student achievement

Major action steps taken:

- All district staff hired
- Implementation updates, next steps, adjustments, and considerations presented to and vetted with working group
- Ongoing collaboration and evaluation provided by Program Evaluation and Innovation Team
- Professional learning series provided to Teacher Assistants and Acceleration Resource Teachers to focus and direct their work of supporting the program goals and objects
- Professional learning and book study conducted identifying specific strategies and practices to reverse underperformance of Struggling Students and Schools
- English Language Learners (ELL) Path to Proficiency Thinking Maps Level 2 training with a cohort of teachers from across the district from 13 schools.
- English to Speakers of Other Languages (ESOL) on-site technical assistance, training and support provided to all schools
- ESOL Family Reading Night conducted for all English Language Learners (ELLs) and their families at south end schools

Upcoming Milestones:

- ESOL Family Reading Night for all English Language Learners (ELLs) and their families at north and central end schools
- Additional professional learning offerings provided for teachers during the summer
- Online professional learning options made available to teachers

- Summer Academy for Targeted Schools, Instructional Coaches, and Acceleration Resource Teachers (ARTS) to develop systems, strategies, and practices to support the needs of ELLS and Struggling Students
- Continued collaboration with Title I to continue the Teacher Assistant professional learning series for 2015-16.

Final detailed budget for implementation:

Description of position/activity (Project #18002)	Budget 2014-15	Projected Actual 2014-15	Budget 2015-16 Funding required
1 ESOL Program Specialist @ \$68,435 for 216 days – Salary & Benefits	66,171	53,133	68,435
1 Secretary II @ \$40,043 for 247 days – Salary & Benefits	38,722	25,560	40,043
4 Regional ELL School Specialists @ \$55,763 for 196 days – Salary & Benefits	221,544	143,438	223,052
21 School-Based Acceleration Resource Teachers @ \$55,763 for 196 days – Salary & Benefits	1,163,106	1,094,375	1,163,106
15 Paraprofessionals to support literacy for 30 hours a week @ \$23,210	217,620	278,916	348,150
Substitutes for professional development	71,098	71,098	71,098
Computer set-up for 27 staff @ \$1,500	40,500	40,500	0
Supplies/materials for professional development	50,000	53,868	50,000
Program Cost and Consultants	50,000	14,000	50,000
In and Out-of-County Travel	10,000	1,685	5,000
Total	\$1,928,791	\$1,935,330	\$2,018,884

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$2,000,000	\$1,928,761	\$1,935,330

2015-16 SFP projected funding for implementation	2015-16 actual funding required for implementation
\$1,888,261	\$2,018,884

Reference: Strategic Finance Plan 2016-2018: Pages 5, 6, 25, 26, 27

Instructional Priority – Talent Development Pipeline

Executive Sponsor: Laurie Marshall (Chief of Staff) **Leader:** Andrea Guogas (Project Manager, Evaluation and Compensation)

Working group membership:

- Laurie Marshall (Chief of Staff)
- Marilyn Doyle (Chief of Administration)
- Dominick Pedata (Supervisor, Employee Relations and Compensation)
- Stuart Klatte (LCEA Leader)
- Program Specialist from ASU
- Julie Summerlin (Coordinator, Career, Adult & Community Ed)
- Michelle Hoppenstedt (Human Resources Tech & Support Manager)
- Maureen Slovak (Ad Hoc Member)
- Linda Shepherd-Miller (Principal, Lake Minneola High School)
- Middle School Administrator
- Elementary School Administrator

Working group objectives/goals to support C² Ready students:

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

Major action steps taken:

- Negotiated and approved plan in the LCEA Contract for 2014-2015
- Developed communication plan, materials, resources, newsletter for instructional staff and administrators
- Sent communication to instructional staff and administrators prior to bonuses and supplements being paid
- Provided ongoing support to answer questions and address issues with LIFT for LCS bonuses and supplements
- Provided evaluation data needed to calculate bonuses and supplements
- Will meet with Talent Development Pipeline Committee on May 1, 2015 to review Accountability Metrics and determine if revisions need to be made
- Will complete plan and send information to teachers before the close of the school year

Upcoming Milestones:

- Meet with Talent Development Pipeline Committee on May 1, 2015. Modify plan as needed.
- Present modified plan to Board of Education and LCEA for approval.
- Communicate plan to School-Based Administrators and instructional staff.

Final detailed budget for implementation:

Description of position/activity (Project #18008)	Budget 2014-15	Projected Actual 2014-15	Budget 2015-16 Funding required
Manager of Employee Compensation and Evaluation Salary & Benefits	TBD	0	104,000
Compensation and Evaluation Analyst Salary & Benefits	TBD	0	95,000
Bonuses for Highly Effective and Effective Teachers in targeted schools	TBD*	1,180,830	TBD*
Recruitment Bonuses for Effective/Highly Effective Teachers moving to Target Schools	TBD		TBD*
Critical Shortage Bonuses	TBD		TBD*
Stipends for Leadership Roles (Stipends for additional roles)	TBD		TBD*
Total	\$1,025,000	\$1,180,830	\$1,644,000

**Instructional compensation is subject to negotiations with LCEA*

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$1,400,000	\$1,025,000	\$1,180,828

2015-16 SFP projected funding for implementation	2015-16 actual funding required for implementation
\$1,609,000	\$1,644,000

Reference: Strategic Finance Plan 2016-2018: Pages 7, 28, 29, 30

Instructional Priority – Teacher Induction and Coaching Framework

Executive Sponsor: David Christiansen (Chief Academic Officer) **Leader:** Stacey Roberts (Director, Professional Development and Leadership)

Working group membership:

- Rusty Dosh (Administrative Coordinator Federal Programs)
- Kathy Halbig (Manager, Innovative Learning)
- Randy Campbell (Principal, Umatilla High School)
- Andrea Guogas (Project Manager, Evaluation and Compensation)
- Elizabeth Feld (New Teacher Coach)
- Theresa Frisby (New Teacher Coach)
- Linda Connor (Instructional Coach)
- Judy Davis (Instructional Coach)
- Val Pumariaga (Instructional Coach)
- Nicole Moses (Instructional Coach)
- Stacia Tatum (Instructional Coach)
- Kenya Williams (Instructional Coach)
- Vacant (Instructional Coach)
- Bill Miller (Principal, Leesburg High School)
- Abigail Crosby (Assistant Principal, Windy Hill Middle School)
- Midge Abston (Assistant Principal, Seminole Springs Elementary School)
- Robin Meyers (Principal, Lake Hills School)

Working group objectives/goals to support C² Ready students:

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

Major action steps taken:

- Assigned instructional coaches based on feeder patterns
- Reviewed evaluation survey data from professional development events
- Coordinated training and follow up events with New Teacher Center and Marzano Research
- Conducted progress monitoring activities
- Prepared 2014-15 Teacher Induction Survey

Revisions/additions to plan provided to the Board on January 12, 2015:

Upcoming Milestones:

- Conduct Teacher Induction Survey for 2014-15
- Develop year 3 program implementation plan including district-wide framework for training coaches
- Identify schools and coaches participating in Year 1 of the Professional Learning Series
- Identify schools and coaches participating in Year 2 of the Professional Learning Series

Final detailed budget for implementation:

Description of position/activity (Project #18004)	Budget 2014-15	Projected Actual 2014-15	Budget 2015-16 Funding required
3 District Instructional Coaches for 196 days @ \$55,763 Salary & Benefits	166,158	84,281	167,289
1 Program Specialist for 216 days @ \$68,435 Salary & Benefits	66,171	50,977	68,435
Professional Development Consultant Fees (Includes Marzano Training and NTC Contracts)	100,000	119,620	0
Materials for Professional Development	5,000	5,000	0
Other Consultant Costs/Travel, Licensing, Consultation	20,000	Included in PD Consultant fees	0
Online Coaching Tools	11,000	11,000	0
Year 2, Professional Learning Series for Cohort A including training, PLC Forums, coaching tools and materials	0	0	68,300
Year 1, Professional Learning Series for Cohort B including training, PLC Forums, coaching tools and materials	0	0	64,500
In-County Travel for Coaches	5,500	4,610	0
Computer set up for 4 new coaches @ \$1,500	6,000	5,892	0
Materials for New Coaches and Manager	500	6,428	0
Train-the-Trainer Academy <ul style="list-style-type: none"> Training for 2 district instructional coaches to become certified with New Teacher Center (capacity building) 			3,000
Total	\$380,329	\$287,808	\$371,524

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$400,000	\$380,329	\$287,808

2015-16 SFP projected funding for implementation	2015-16 actual funding required for implementation
\$373,000	\$371,524

Reference: Strategic Finance Plan 2016-2018 – pages 8, 31, 32

Instructional Priority - Leadership Advancement

Executive Sponsor and Leader: Marilyn Doyle (Chief of Administration)

Working group membership:

- Melissa DeJarlais (Principal, Fruitland Park Elementary School)
- Laurie Marshall (Chief of Staff)
- Carolyn Samuel (Director, Human Resources)
- Stacey Roberts (Director, Professional Development and Leadership)
- Pam Chauteauneuf, (Principal, Gray Middle School)
- Jacob Stein (Assistant Principal, East Ridge High School)
- Linda Shepherd-Miller (Principal, Lake Minneola High School)
- Steve Benson (Principal, Clermont Middle School)
- Brenna Burkhead (Principal, Sorrento Elementary School)

Working group objectives/goals to support C² Ready students:

1. Create training and protocols that establish succession planning and pathway to school leadership advancement for assistant principals and teacher leaders
2. Improve level of leadership advancement opportunities supporting assistant principals, principals, and district leaders through professional development, one-on-one mentoring and professional learning communities
3. Ensure that principals receive in-depth support during the first two years

Major action steps taken:

- Rigor-tested action plan
- Researched principal coaching and training models
- Explored National Institute for School Leadership Model
- Designed model for principal induction and development

Upcoming Milestones:

- Negotiate i3 grant training support by National Institute for School Leadership
- Employ district staff
- Begin Year 1 implementation for 2015-2016 school year
- Complete a plan for principals, assistant principals, and district leadership advancement
- Lead planning and development of protocols for principal succession and assistant principal development
- Examine the “Pathway to Leadership” program and prepare recommendations for enhancement

Final detailed budget for implementation:

Description of position/activity (Project # 18009)	Budget 2014-15	Projected Actual 2014-15	Budget 2015-16 Funding required
Director of Leadership Salary & Benefits	0	0	\$130,000
Computer set-up	0	0	1,500
Cell phone usage			750
Supplies and materials	0	0	1,250
District Professional Development	0	0	23,000
In-County/Out-of-County Travel	0	0	5,000
Total	0	0	\$161,500

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$161,500	0	0

2015-16 SFP projected funding for implementation	2015-16 actual funding required for implementation
\$161,500	\$161,500

Reference: Strategic Finance Plan 2016-2018- Pages 9, 33, 34

Instructional Priority - Program Evaluation and Innovation

Executive Sponsor: Executive Cabinet **Leader:** Kathleen Gingras (Director, Planning, Evaluation and Accountability)

Working group membership:

- Carol MacLeod or designee (Chief Financial Officer)
- David Christiansen or designee (Chief Academic Officer)
- Liz Hobert (Coordinator, Special Projects)
- Creed Wheeler or designee (Executive Director IT)
- Laurie Marshall or designee (Chief of Staff)
- Jan Tobias (Director, Student Services)
- Rusty Dosh (Administrative Coordinator Federal Programs)
- Naomi VanAmburg (Federal Programs)
- Judy Miller (Director, Exceptional Student Education)
- Jeff Cooper (Program Evaluation and Innovation Specialist)
- Parul Acharya (Program Evaluation and Innovation Analyst)
- Ad hoc members: Principal Representatives and District Staff as needed for innovation submissions and program evaluations

Working group objectives/goals to support C² Ready students:

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

Major action steps taken:

- Hired Program Evaluation and Innovation Specialist and Analyst
- Program Evaluations for all EngageLCS Instructional Priorities and other targeted programs that include Achieve 3000, Edviation (formerly PD360), AVID, and PreK reading programs
- Saved the district \$84,875 on the renewed Edviation contract surpassing the metric goal for 2015

Upcoming Milestones:

- Complete program evaluations and present to the Executive Cabinet
- Pursuing partnership with Teachers College, Columbia University, Center for Benefit-Cost Studies of Education to pilot the Cost Tool Kit and apply to participate in the Methods Training Program offered by the university
- Continue to facilitate the development of business processes to refine the Program Evaluation and Innovation system
- Continue to establish metrics in collaboration with programs leads to track performance and return on investment
- Facilitate additional program and innovation reviews
- Continue to increase the return on investment for district funds

Final detailed budget for implementation:

Description of position/activity (Project #18005)	Budget 2014-15	Projected Actual 2014-15	Budget 2015-16 Funding required
Program Evaluation and Innovation Specialist for 247 days – Salary & Benefits	84,000	77,237	87,065
Program Evaluation and Innovation Analyst for 247 days – Salary & Benefits	65,000	47,976	71,510
Professional Development- Support	3,000	0	3,000
Computer set-up for new hires	3,000	3,444	0
In-County Travel	3,500	1,000	3,500
Out-of-County Travel	1,500	500	3,000
Supplies and Materials	500	447	500
Total	\$160,500	\$130,604	\$168,575

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$200,000	\$160,000	\$130,604

2015-16 SFP projected funding for implementation:	2015-16 actual funding required for implementation:
\$174,698	\$168,575

Reference: Strategic Finance Plan 2016-2018- Pages 10, 35, 36

Instructional Priority - Personalized Learning for Teachers and Leaders

Executive Sponsor: David Christiansen (Chief Academic Officer) **Leader:** Andrea Pyatt (iPD Facilitator)

Working group membership:

- Stacey Roberts (Director, Professional Development and Leadership)
- Kelly Cousineau (iPD Design Expert)
- Kathy Halbig (Manager, Innovative Learning)
- Liz Hobert (Coordinator, Special Projects)
- Michael Geoffrion (Teacher, Eustis High School)
- Dennis Doherty (Teacher, Windy Hill Middle School)
- Latonya McDuffie (Teacher, Beverly Shores Elementary School)
- Stuart Klatte (President, LCEA)
- Julie Robinson-Lueallen (Principal, East Ridge High School)
- Randy Campbell (Principal, Umatilla High School)
- Charlie McDaniel (Principal, East Ridge Middle School)
- Kathy Falcon (Assistant Principal, Sawgrass Bay Elementary School)

Working group objectives/goals to support C² ready students:

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

Major action steps taken:

- Hired the iPD Facilitator and iPD Design Expert
- Established the Personalized Learning Core Team
- District Team attended the iPDFest in New Orleans, LA and the Learning Forward Conference in Nashville, TN, focusing on iPD learning
- Administered the MDRC baseline fall survey to middle schools and high schools
- Purchased extension of PD360/Edivation through June; examining effectiveness with support from Program Evaluation and Innovation Specialist
- Continuing support in foundational frameworks (standards-based instruction, mini-tasks, LDC, and lesson study) at eight high schools and three middle schools involved in the iPD work

Revisions/additions to plan provided to the Board on January 12, 2015

- Replaced IT Support Tech and Innovative Learning Specialist positions with Digital Content Systems Architect to better fill the needs of creating a multi-modal system for Personalized Learning

Upcoming Milestones:

- Create work plans for initiatives through project management applications and strategically interface the iPD projects to align with district initiatives and context to include short-and-long-term plans and timelines
- Continue Personalized Learning for Florida Standards Teachers and PLUS Teams supporting foundational frameworks (standards-based instruction, mini-tasks, LDC and lesson study)
- Support School by Design Amplify Software usage with secondary school building leaders and district leads to create scenarios for reconfiguring master schedules to allow for teacher collaborative time, to design proactively for known student challenges, and to embed personalized learning for students

Final detailed budget for implementation:

Description of position/activity (Project #18001)	Budget 2014-15	Projected Actual 2014-15	Budget 2015-16 Funding required
Digital Content Systems Architect Salary and Benefits <i>[Replacement for IT Support Tech]</i>	0	0	100,000
1 Innovative Learning Specialist for 201 days-Salary & Benefits	59,547	59,403	0
1 IT Support Tech for 12 month-Salary & Benefits	54,069	0	0
13 Florida Standards Teachers for the Middle and High Schools for 196 days @ \$55,763 – Salary & Benefits <i>(For 2015-16 budget projection based on actual staffing)</i>	720,018	749,901	750,000
Substitutes to provide collaborative planning time for teachers <i>(For 2015-16 iPD grant provides partial funding)</i>	250,000	250,000	125,000
Computer set-up for ILS and 15 staff @ \$1,500	22,500	21,000	0
Software to support personalized learning	100,000	35,775	115,000
Total	\$1,206,134	\$1,116,079	\$1,090,000

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$1,000,000	\$1,206,134	\$1,116,079

2015-16 SFP projected funding required for implementation	2015-16 actual funding required for implementation
\$1,062,782	\$1,090,000

Reference: Strategic Finance Plan 2016-2018- Pages 11, 37, 38, 39

Instructional Priority - Personalized Learning for Students

Executive Sponsor: Creed Wheeler (Executive Director, Information and Instructional Technology)

Leader: Kathy Halbig (Manager, Innovative Learning)

Working group membership:

- David Christiansen (Chief Academic Officer)
- Carol MacLeod (Chief Financial Officer)
- Laurie Marshall (Chief of Staff)
- Marilyn Doyle (Chief of Administration)
- Will Davis (Chief of Operations)
- Sherri Owens (Communications Officer)
- Liz Hobert (Coordinator, Special Projects)
- Kathlene Jarvis (Director, Curriculum and Instruction, Secondary)
- Carmen Arnold (Director, Curriculum and Instruction, Elementary)
- Missy Broker (Innovative Learning Specialist)
- Brent Balkaran (Teacher, Tavares High School)
- Clinton Pownall (Community Member/Business Owner)
- Bill Giffing (Community Member)
- Dr. Michael Hynes (Director, Teaching and Learning, UCF)
- Jacob Stein (Assistant Principal, East Ridge High School)
- William Roberts (Assistant Principal, Windy Hill Middle School)
- Heather Gelb (Principal, Sawgrass Bay Elementary School)

Working group objectives/goals to support C² Ready students:

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

Major action steps taken:

- Each of eight pilot schools began the process of exploring personalized learning with a specific focus on how the personalized learning work would unfold at their site including training through the Reinventing Schools Coalition and site visits to different personalized learning schools throughout the country
- Each school developed a proposal, including budget, for implementing their plan
- Each school presented their plan to a district panel who, in conjunction with representatives from the Bill & Melinda Gates Foundation (BMGF), evaluated the proposals to determine readiness for moving forward with launch of personalized learning in the fall of 2015
- The district submitted a budget proposal to BMGF for Phase III of the Next Gen Grant
- Facilitated a celebration and debrief for each of the eight school design teams
- Established a Community of Practice focused on personalized learning

Upcoming Milestones:

- Prepare final report for Phase II
- Request applications for Cohort 2

- Complete approval for Phase III BMGF funding
- Develop metrics in coordination with those established through the Next Gen Grant
- Announce launch schools
- Review applications and select Cohort 2 schools
- Assign ILSs to support Cohort 2 schools for their planning year
- Implement a professional development plan for May 2015 - June 2016
- Setup budgets for both planning and launch schools
- Coordinate with academic services to create a framework for competency-based progression
- Evaluate Next Gen Tiger Team work to determine next steps

Revisions/additions to plan provided to the Board on January 12, 2015:

The district's scale up plan calls for bringing on 4 – 6 schools each year over the next seven years, moving to a fully personalized district by 2022. The current plan for scale up follows:

	Schools in Planning Phase	Schools in Launch Phase
2014-15	8	
2015-16	6 (4 new + 2 from previous cohort)	6
2016-17	6	6
2017-18	6	6
2018-19	6	6
2019-20	6	6
2020-21	4	6
2021-22		4

Final detailed budget for implementation:

The budget, below, represents basic resources not covered by Next Gen grant funds that are needed to implement personalized learning for students.

Description of position/activity (Project #18006)	Budget 2014-15	Projected Actual 2014-15	Budget 2015-16 Funding required
Coordinator on Special Assignment for Personalized Learning Salary & Benefits (Coordinator Level)	0	0	107,000
3 Innovative Learning Specialists for 201 days Salary & Benefits @ \$60,597	119,094	121,244	181,791
Extended days for ILSs and/or Tech Trainers to support the PL work over the summer	19,352	9,000	19,915
Fiscal Assistant <i>[To be funded through Next Gen Grant]</i>	0	0	0
Computer set-up for 2 new ILSs @ 1,500	3,000	3,000	0
Funds for Professional Development for the district staff who will be supporting the personalized learning initiatives in the schools	20,000	20,000	0
Planning Funds for 6 schools @ 20,000 per school	0	0	120,000

District contribution for personalized learning launch schools; additional implementation Funds for launch schools provided by Next Gen Grant for 2015-16	0	0	500,000
Technology systems to support personalized learning	80,000	80,000	80,000
Total	\$241,446	\$233,244	\$1,008,706

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$300,000	\$241,446	\$233,244

2015-16 SFP projected funding for implementation:	2015-16 actual funding required for implementation
\$2,068,085	\$1,008,706

Return Metrics:

As part of the Next Gen Systems Initiative grant, success measures will be developed and applied to each of the launch schools. Rather than establish separate measures which might duplicate those required by the grant, we intend to analyze the grant measures to see if/how they might provide a springboard for the district's work. The initial grant metrics should provide the foundation to develop appropriate success measures for the district which can then apply to each of the personalized learning schools as the district scales up through 2022.

Reference: Strategic Finance Plan 2016-2018- Pages 12, 13, 40, 41

Realignment Opportunity - High School Schedule

Status: The district moved away from block scheduling and implemented a 6 X 7 schedule for 2014-15 for high schools. This will be the schedule in 2015-16 providing ongoing savings for this realignment opportunity.

Budget line item changes based on recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
Expected amount of funding to realign based on original SFP estimate - \$4,700,000	\$4,700,000

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$4,600,000	\$4,600,000	\$4,600,000

2015-2016 SFP projected realignment	2015-16 actual funding for realignment
\$4,700,000 (Includes ongoing savings from 2014-15)	\$4,700,000

Reference: Strategic Finance Plan 2016-2018 - Pages 17 & 18

Realignment Opportunity – Consolidated Purchasing

Executive Sponsor: Carol MacLeod (Chief Financial Officer)

Leaders: Pam Hayes (Purchasing Manager) Karen Briggs (Director, Finance)

Working group membership:

- Creed Wheeler (Executive Director, IT)
- Kathlene Jarvis (Director, Curriculum and Instruction, Secondary)
- Carmen Arnold (Director, Curriculum and Instruction, Elementary)
- Doug McCarl (Financial Reporting Manager)
- Mike Corr (Director, Maintenance)
- Judy Miller (Director, Exceptional Student Education)
- Liz Bourdon (Director, Federal Compensatory Education)
- Sebrina Dillon-Banks (Administrative Coordinator, Safe Schools)
- Gary Dodds (Supervisor, Food Services)
- Lauren DeRidder (Risk Manager)
- Jan Tobias (Director, Student Services)
- Edward Pfender (Supervisor, Transportation)
- Pati Painter (Senior Executive Assistant)
- Debbie Stivender (School Board Member)
- TBD classified personnel
- Linda Shepherd-Miller (Principal, Lake Minneola High School)
- Kelly Sanders (Principal, Umatilla Middle School)
- William Roberts (Assistant Principal, Windy Hill Middle School)

Working group objectives/goals:

- Consolidate and standardize purchasing procedures

Major action steps:

- Implementation of identified savings for 2014-15:
 - 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
- Provided training updates on purchasing policies and procedures to all purchasing contact throughout the District through training and review of a Purchasing Support Manual
- Established a District-wide committee “Purchasing Roundtable” to review and make recommendations to assist in a process of purchasing called Strategic Sourcing
- Pursue District-wide printing solution to encompass the District Print Shop and all copiers and printers

Budget Recommendation:

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

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$2,000,000	\$850,000	\$850,000

2015-16 SFP Projected realignment	2015-16 actual funding for realignment
\$850,000 (Includes on-going savings from 2014-15)	\$850,000

Reference: Strategic Finance Plan for 2016-18 – Pages 17 & 18

Realignment Opportunity - IDEA Funding/Efficiencies

Executive Sponsor: Carol MacLeod (Chief Financial Officer)

Leaders: Judy Miller (Director, Exceptional Student Education) Maureen Slovak (Budget and FTE Manager)

Working group membership:

- Kristine Hawkins (Administrative Coordinator, Student Services)
- Brenna Burkhead (Principal, Sorrento Elementary School)
- Deborah Stedelin (Assistant Principal, Lake Hills)
- Holly Ryan (Assistant Principal, Umatilla High School)
- Gary Dodds (Supervisor, Food Services)

Working group objectives/goals:

1. Strategically reduce the amount of ongoing IDEA reserves, spending more of the district's IDEA funding each year (*Note: leads to one-time savings spread over 3 years*)
2. Pursue additional reimbursements and evaluate efficiencies of staffing placement

Major action steps taken to reach recommendations:

- Examined Facilitative Support positions and determined current 1 to 25 students provides adequate service
- Examined school staffing ratios for ESE students of varying exceptionalities and determined district allocation formula is being followed
- Examined 15% funding allocation potential for prevention/early intervention and determined this funding already is designated in the ESE budget and used appropriately
- Examined Medicaid and other insurance reimbursement and determined current level of effort provides best return on investment
- Examined strategically decreasing the amount of IDEA funding annually held in reserve and found based on current status that the expected recurring savings will not be available to due increases in salaries of staff

Recommendation:

Budget Recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
IDEA Funding – Provided 12% of all IDEA applicable EngageLCS costs	250,000
Total IDEA/Self-Funding Professional Development	\$250,000

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$500,000	\$333,126	\$250,000

2015-16 SFP projected realignment	2015-16 actual funding for realignment
\$330,000	\$250,000

Reference: Strategic Finance Plan 2016-2018 – Pages 17 & 18

Realignment Opportunity – Maintenance: Lawn Care

Executive Sponsor and Leader: Will Davis (Chief of Operations)

Working group membership:

- Mike Corr (Director, Maintenance)
- 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, Pine Ridge Elementary School)
- Gregg Moore (Head Custodian, Umatilla Middle School)
- Alphonso Williams (Custodian, Tavares Elementary School)
- Kim Cronin (SEIU)
- Kelly Sanders (Principal, Umatilla Middle School)
- Carl Hall (Assistant Principal, Tavares High School)
- Johnathan Owens (Principal, Eustis Middle School)
- Cleamstine Caple (Principal, Clermont Elementary)

Working group objectives/goals:

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

Major action steps taken to reach recommendations:

- Convened team to develop a detailed plan for allocating school staff and equipment to provide a district-wide lawn-care service
- Based evaluation on detailed acreage analysis
- Established that new detailed analysis and increased pay grade for lawn-care team positions will not provide estimated savings
- Examined athletic fields for service

Recommendation:

- Creating lawn-care teams to service schools given the current scenario will not produce estimated savings
- Continue examining other options for lawn care at school sites
- Outsource athletic field care through a bid process

Budget Recommendation:

Description of action to be taken	Resulting funding
Outsource care of athletic fields through bid process	\$85,000
Total	\$85,000

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$500,000	\$251,317	0

2015-16 SFP projected realignment	2015-16 actual funding for realignment
TBD	\$85,000

Reference: Strategic Finance Plan 2016-2018 Pages 17 & 18

Realignment Opportunity – Management Discretion

Executive Sponsor and Leader: Carol MacLeod (Chief Financial Officer)

Working group membership:

- Susan Moxley (Superintendent)
- David Christiansen (Chief Academic Officer)
- Laurie Marshall (Chief of Staff)
- Creed Wheeler (Executive Director IT)
- Marilyn Doyle (Chief of Administration)
- Will Davis (Chief of Operations)
- Sherri Owens (Communications Officer)
- Liz Hobert (Coordinator, Special Projects)

Working group objectives/goals:

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

Major action steps taken to reach recommendations:

- Reviewed the discretionary budgets of department and schools for 2014-15
- Identified reductions that could be recommended with minimal disruption from the prior year

Budget Recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
Identified reductions that can be made with minimal disruption	\$326,867

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$300,000	\$326,867	\$326,867

2015-16 SFP projected realignment	2015-16 actual funding for realignment
\$480,000 (Includes ongoing savings from 2014-15)	\$476,867

References: Strategic Finance Plan 2016-2018 - Pages 17 & 18

Realignment Opportunity - Transportation Software

Executive Sponsor: Will Davis (Chief of Operations) **Leader:** Scott Pfender (Supervisor, Transportation)

Working group membership:

- Dawn McDonald (Senior Planner, Growth Planning)
- Harris Jacobs (Information Services Manager)
- Lauren DeRidder (Risk Manager)
- Kim Varnadore (SAC Representative, Mount Dora High School)
- Beth Shaver (SAC Representative, Grassy Lake Elementary School)
- Mike Woods (Planner, Metropolitan Planning Organization)
- Linda Monroe (Bus driver, Lake Ridge lot)
- Kim Cronin (SEIU)
- Lori Maddox (Transportation Operations Manager)
- Dominick Pedata (Supervisor, Employee Relations and Compensation)
- Karen Oates (Assistant Principal, Mount Dora Middle School)
- Anthony Russell (Assistant Principal, Leesburg High School)
- Charles Feld (Assistant Principal, East Ridge High School)
- Keith Hunt (Assistant Principal, Windy Hill Middle School)

Working group objectives/goals:

- Determine bus schedule efficiencies from implementation of routing software

Major action steps taken to reach recommendations:

- Software installed and used to route student transportation for 2014-15

Recommendation:

Continue building on efficiencies gained through installation of software using the following steps:

- Updated student ridership information will be assessed as part of Survey 3 for FTE transportation reimbursement
- Update Web Compass bus routing software to divide the general education and special education routes into two scenarios for financial assessment purposes
- Have Web Compass generate the cost of the routes as they currently exist
- Set up Web Compass to optimize routes based on current bus stops and bell schedules
- Evaluate the new optimized routes to determine if realistic and make necessary adjustments as needed
- Evaluate the current vs. the optimized cost to determine the anticipated cost savings

Budget Recommendation:

Description of action to be taken	Resulting funding for alignment to Investment Opportunities
Use new routing software to route the current 3- tier system for 2015-2016	\$300,000

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$300,000	\$200,000	\$200,000

2015-16 SFP projected realignment	2015-16 actual funding for realignment
\$400,000 (Includes ongoing savings from 2014-15)	\$300,000

Reference: Strategic Finance Plan 2016-2018: Pages 17 & 18

Realignment Opportunity - Administrative Salaries

Executive Sponsor and Leader: Marilyn Doyle (Chief of Administration)

The new Administrative Salary Schedule has been implemented for 2014-15. The savings will be tracked yearly and provide ongoing realignment support for the Instructional Priorities.

Budget Recommendation:

Description of action to be taken	Funding for alignment to Investment Opportunities
Continue to implement new administrative salary schedule	\$325,000

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$200,000	\$248,174	\$250,000

2015-16 SFP projected realignment	2015-16 actual funding for realignment
\$300,000 (Includes ongoing savings from 2014-15)	\$325,000

Reference: Strategic Finance Plan 2016-2018- Pages 17 & 18

Realignment Opportunity – Athletics Transportation

Executive Sponsor and Leader: Marilyn Doyle (Chief of Administration)

Recommendation:

Continue reductions implemented athletic transportation begun in 2014-15

Budget Recommendation:

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

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

2015 -16 SFP projected realignment	2015-16 actual funding for realignment
\$120,000 (Includes ongoing savings from 2014-15)	\$116,750

Reference: Strategic Finance Plan 2016-2018 – Pages 17 & 18

Realignment Opportunity – Clerical Work Group

Executive Sponsor: Laurie Marshall (Chief of Staff) **Leader:** Carolyn Samuel (Director, Human Resources)

Working group membership:

- Tom Mock (Director, Internal Audit)
- Kim Cronin (SIEU)
- Jessica Hopperton (Data Entry, Virtual School)
- Kimberly Jarvis (Principal, Groveland Elementary School)
- Angela Jones (Administrative Assistant to Chief of Operations)
- Diane Lingerfelt (Fiscal Assistant, Risk Management)
- Charlene Moyer (HR Specialist)
- Jennifer Pease (School Secretary, Carver Middle School)
- Julie Summerlin (Coordinator, Career, Adult & Community Education)

Working group objectives/goals:

- Explore reducing number of clerical staff based on comparable schools data

Major action steps taken:

Recommendations delayed until Skyward implementation is fully functioning. Report due June 30, 2015 from Work Group

Reference: Strategic Finance Plan 2016-2018 – Pages 17 & 18

Realignment Opportunity – Guidance Counselors

Executive Sponsor: Marilyn Doyle (Chief of Administration) **Leader:** Jan Tobias (Director, Student Services)

Working group membership:

- Kristine Hawkins (Administrative Coordinator, Student Services)
- Kenneth Lyford (Program Specialist, Student Services)
- Cheri Burgess (School Counselor, South Lake High School)
- Denise Burry (Parent)
- Michelle Carpenter (Parent)
- Pam Chauteauneuf (Principal, Gray Middle School)
- Mollie Cunningham (Principal, Carver Middle School)
- Priya Duryee (Program Specialist, Student Services)
- Pat Lawson (Administrative Coordinator, ESE)
- Tonya Mass (Program Specialist, Testing and Evaluation)
- Caroline O’Conner (School Counselor, Windy Hill Middle School)
- Stacy Pallitto (School Counselor, Tavares Elementary School)
- Angela Ratter (Program Specialist, Student Services)
- Debra Rogers (Principal, Umatilla Elementary School)
- Nanci Schwartz (Parent)
- Jeanette Tietjen (Program Manager, Teaching and Learning)
- Paula Wicker (Program Manager, Testing and Evaluation)

Working group objectives/goals:

1. Align counselor allocation ratios and responsibilities to state frameworks and best practices
2. Explore reducing number of counselors based on comparable school data

Major action steps taken to reach recommendations:

- Collected information from surrounding and like-size districts regarding responsibilities of counselors
 - Reviewed current allocation formula and proposed alternative allocations options
 - Reviewed state and district counselor frameworks to bring counselor responsibilities into alignment
 - Presented several comprehensive options to Executive Cabinet

Recommendation: School allocation formula adjusted to move towards equity for school sites

Budget Recommendation:

Description of action to be taken	Funding for alignment to Investment Opportunities
Use allocation formula to equalize Guidance Counselors between schools; reduction of 1.5 Counselors	90,966
Total	\$90,966

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
0	0	0

2015-16 SFP projected funding for implementation	2015-16 actual funding required for implementation
TBD	\$90,966

Reference: Strategic Finance Plan 2016-2018 – Pages 17 & 18

Realignment Opportunity –Self-Funding PD

Executive Sponsor: David Christiansen (Chief Academic Officer)

Co-Leaders: David Christiansen (Chief Academic Officer) and Carol MacLeod (Chief Financial Officer)

Working group membership:

- Stacey Roberts (Director, Professional Development & Leadership)
- Pat Lawson (Administrative Coordinator, Exceptional Student Education)
- Rusty Dosh (Administrative Coordinator Federal Programs)
- Melissa Lyford (Program Specialist, Exceptional Student Education)
- Laura Wright (ESE School Specialist, Mount Dora Middle School)
- Trella Mott (Principal, Tavares Middle School)
- Kay Sawchuk (Principal, Eustis Elementary School)

Working group objectives/goals:

- Repurpose use of Title I and Title II dollars to support Instructional Priority Opportunities

Budget Recommendation:

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

2014-15 SFP projected funding	2014-15 Budget	2014-15 projected actual
\$1,300,000	\$1,296,750	\$1,296,759

2015-16 SFP projected realignment	2015-16 actual funding for realignment
\$1,300,000	\$1,296,759

Reference: Strategic Finance Plan 2016-2018 – Page 17

Approved SFP for 2016-2018 (Board Approved January 12, 2015)

Total savings					Total investments				
	Actual	Projected <u>additional savings</u> relative to previous year				Actual	Projected <u>additional spend</u> relative to previous year		
	2014-15	2015-16	2016-17	2017-18		2014-15	2015-16	2016-17	2017-18
Shift of expenses out of general fund (\$M)					Baseline (\$M)				
Capital expenditures	2.0	2.0	2.5	2.5	Adjusted Baseline Gap	3.82	1.79	4.53	6.60
Realignments within general fund (\$M)					Investments in Instructional Priorities (\$M)				
High School Schedule	4.6	4.7	4.8	4.9	Roll forward - previous year		0.94	1.76	(0.21)
Consolidated purchasing	0.85	0.85	0.85	0.85	ELL/Struggling Students	1.9	1.9	1.8	1.8
IDEA funding (non-recurring)	0.33	0.33	0.33	0.33	Talent Development Pipeline	1.03	1.61	1.61	1.61
Maintenance: lawn care	0.0	TBD	TBD	TBD	Teacher Induction & Coaching	0.38	0.37	0.37	0.37
Management discretion	0.33	0.48	0.50	0.50	Principal Induction & Dev.	--	0.16	0.16	0.16
Transportation	0.20	0.40	0.40	0.40	Program Evaluation & Inn.	0.16	0.17	0.18	0.18
Administrative salaries	0.25	0.30	0.35	0.35	Pers. Learning (T/L)	1.21	1.06	1.01	0.27
Athletics transportation	0.12	0.12	0.12	0.12	Pers. Learning (Students)	0.24	2.07	2.87	2.87
Clerical	--	--	--	--	Other Investment Opportunities	-	TBD	TBD	TBD
Guidance counselors	--	--	--	--	Total IP investment	4.94	7.34	8.02	7.23
Other TBD ideas	--	--	--	--	Additions: HS Testing/Super	0.53	0.53	0.53	0.53
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 investment including Adjusted Baseline Gap	9.29	8.71	11.35	14.56
Total savings	10.22	10.47	11.15	11.25					

Summary of Realignment and Investment Opportunities for 2015-16

Realignment Opportunities			Investment Opportunities		
	Approved SFP	Recommended Budget		Approved SFP	Recommended Budget
	2015-16	2015-16		2015-16	2015-16
Shift of Expenses out of General Fund			Baseline		
Capital Expenditures	2,000,000	2,000,000	Roll Forward (GAP)- Estimated	(1,790,000)	(1,790,000)
Realignment within General Fund			Instructional Priorities Costs		
High School Schedule	4,700,000	4,700,000	Net Roll Forward (GAP)	(1,790,000)	(1,790,000)
			Roll Forward from previous year	940,000	940,000
Consolidated Purchasing	850,000	850,000	ELL / Struggling Students and Schools	(1,888,261)	(2,018,884)
IDEA Funding	330,000	250,000	Talent Development Pipeline	(1,609,000)	(1,644,000)
Maintenance - Lawn Care	TBD	85,000	Teacher Induction & Coaching	(373,000)	(371,524)
Management Discretion	480,000	476,867	Leadership Advancement	(161,500)	(161,500)
Transportation	400,000	300,000	Program Evaluation & Innovation	(174,698)	(168,575)
Administrative Salaries	300,000	325,000	Pers. Learning (Teachers/Leaders)	(1,062,782)	(1,090,000)
Athletic Transportation	120,000	116,750	Self-Funding Across PD Initiatives (Moved to Realignment Opportunities)	-	-
Clerical	2015-16 TBD	TBD	Pers. Learning (Students)	(2,068,085)	(1,008,706)
Guidance Counselors	2015-16 TBD	90,966		-	-
Other TBD Ideas	2015-16 -	-	Total: Priorities Only	(7,337,326)	(6,463,189)
Total Realignments (Projected)	9,180,000	9,194,583	Additions:		
Self-Funding PD (TITLE I/ TITLE II) (Moved from Investment Opportunities)	1,300,000	1,269,759	High School Testing Facilitator/Supervisi Virtual Labs (Self-Funded)	(530,000)	(425,376)
					-
			Total Investments	(7,867,326)	(6,888,565)
Total	\$ 10,480,000	\$ 10,464,342	Total Including Baseline Gap	(8,717,326)	(7,738,565)
			Roll Forward for Year 2 Investments in Instructional Priorities (Gap)	\$ 1,762,674	\$ 2,725,777

[illegible]

Summary of Staffing Related to Realignment and Investment Opportunities for 2014-15 and 2015-16

Realignment Opportunities 2014-15			Investment Opportunities 2014-15		
	Admin	Instructional Professional	Managerial	Classified	
Realignment within General Fund			Staffing for Instructional Priorities		
High School Schedule Teachers		(72.00)		ELL / Struggling Students and Schools ESOL Program Specialist	1.00
Maintenance - Lawn Care Custodians				Regional ELL School Specialists	4.00
				Acceleration Resource Teachers	21.00
				Secretary II	1.00
				Paraprofessionals to Support Literacy Substitutes for Teacher PD - TBD	15.00
Net Realignment Opportunities 2014-15 Actual	(72.00)	(72.00)	-	Teacher Induction & Coaching	
				District Instructional Coaches	3.00
				Program Specialist	1.00
				Program Evaluation & Innovation	
				Program Innovation & Evaluation Specialist	1.00
				Program Innovation & Evaluation Analyst	1.00
				Pers. Learning (Teachers/Leaders)	
				Innovative Learning Specialist (ILS)	1.00
				IT Tech Support	1.00
				Florida Standards Teachers	13.00
				Substitutes for Teacher Collaboration - TBD	
				Pers. Learning (Students)	
				Innovative Learning Specialist (ILS)	2.00
				Extended Days for 2 Technical Trainers	
				High School Schedule	
				Testing Facilitators (Certified)	8.00
				Virtual Learning Lab Facilitators	8.00
				Net Investment Opportunities 2014-15 Actual	25.00
					24.00
Realignment Opportunities 2015-16			Investment Opportunities 2015-16		
High School Schedule Teachers	(2.00)			Talent Development Pipeline	
Guidance Counselors	(1.50)			Manager of Employee Compensation	1.00
Athletic Field Custodians				Compensation and Evaluation Analyst	1.00
			(5.00)	Leadership Advancement	
				Director of Leadership	1.00
Net Realignment Opportunities 2015-16	(3.50)		(5.00)	Pers. Learning (Teachers/Leaders)	
				Digital Content Systems Architect	1.00
				Pers. Learning (Students)	
				Coordinator on Special Assignment	1.00
				Innovative Learning Specialist (ILS)	1.00
				Net Investment Opportunities 2015-16	2.00
					2.00
Cummulative Realignment Opportunities	(75.50)	-	-	Cummulative Investment Opportunities	46.00
					2.00
					1.00
					24.00

