

# District Strategic Planning Team 2.0

Tuesday, June 2, 2020

9:00 a.m. to noon



# District Strategic Planning Team 2.0:

## Budget Advisory Committee & Reopening Planning

This District Strategic Planning Team 2.0 combines the Budget Advisory Committee with the Reopening Planning for next year as they are dependent on each other.



# Thank you for being here Members of the Team!

Nina Craig, Bellevue Principal

Josh Simmons, Bellevue Teacher Mod-Severe SDC

Amy Florez, Bellevue Parent Liaison

Natali Ramirez, Bellevue Parent

Denise McCullough, Kawana Springs Principal

Patty Gomez- Teacher: Kawana Springs 1st grade Dual Immersion

Kathy Burt- Kawana Springs Dual Immersion Literacy Paraprofessional

Kate Nagle, Kawana Springs Parent

Jean Walker, Meadow View Principal

Susan Albritton- Meadow View Teacher 6th grade

Donna Rinnels- Meadow View RSP Aide

Norma Velarde, Meadow View Parent

Margaret Jacobson, Taylor Mountain Principal

Becky Hansen, Taylor Mountain Teacher 5th grade

Jennifer Spain, CSEA Rep

Tiffany Kampman BEA Rep

Sally McDaniel, TOSA

Larry Black, Technology Director

Roger Farrell, Director of Maintenance & Operations

Tracy Whitaker, Director of Student Services

Chris J. Kim, CBO

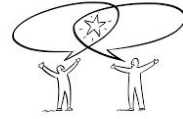
Siara Goyer, Director of Human Resources

Moriah Hart, Executive Assistant

David Alexander, Superintendent



# Norms



- Be respectful: actively listen with grace, and honor ideas
  - Be positive: participate with trust, honesty, caring, and humor
  - Be productive: come prepared, collaborate, and use time efficiently
- ★ Assume positive intentions, be sensitive to feelings, and other perspective (please no sniping comments or unproductive behavior)

A green swirl graphic that starts from the bottom left, loops around the word 'Mission:', and ends at the bottom right.

**Mission:**  
*Inspire learning.*

**Vision:**  
*Engaging and ❤️ (valuing/caring)  
for our families, students and staff  
to empower our community.*

Mission: Why? Why do we exist? Fundamental Purpose

Vision: What? What must our school become to accomplish our purpose? Compelling Future

Values: How? How must we behave to achieve our vision? Collective Commitments

Goals: HOW WILL WE MARK OUR PROGRESS? Targets and Timelines

# BUSD District Overview

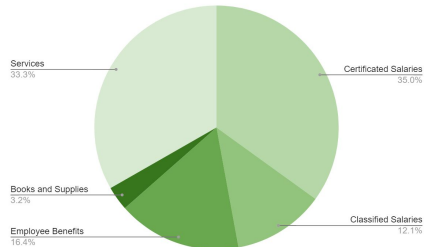


**4** Schools (TK-6)  
Early Learning Center



**1591**  
Students  
(2019-20 Census Day)

## ANNUAL REVENUE



**\$22,331,201**

SUBGROUPS
80% Low Income
62% English Learners
3% Homeless
<1% Foster Youth
91% Unduplicated High Need
16% Special Education




1.1 Student per Technology Device

STUDENT ETHNICITY	
Hispanic	87%
White	7%
Asian	3%
African American	1%
Am Indian/Alskn Nat.	1%
Other	1%



**152 FTE**  
EMPLOYEES

43 %	Support Staff
53%	Teachers
4%	Admin

BUSD ~\$14K /   
Spent per student annually

Nationally, California has  
ranked 46/50 in overall  
per pupil spending

# Historical Perspective DSPT 1.0

- July 2017 fiscal concerns recognized.
- Immediate spending freeze on all expenditures unless mission critical to organization.
- Bellevue Union School District (BUSD) and Fiscal Crisis Management Assistance Team (FCMAT) began to review the district's budget and fiscal health recognizing the immediate fiscal crisis.
  - Develop a multiyear financial projection for the current and subsequent fiscal years due to concerns regarding the fiscal health of the district.
  - Fiscal Health Risk Analysis and determine district's risk rating.
  - FCMAT Fiscal Review Report Executive Summary concluded concerns regarding cash flow. the need to immediately decrease expenditures and increase its cash balance.
- District assembled a District Strategic Planning Team (DSPT); Budget Reduction Committee
  - Goals: 1. Define our "Why", 2. Refine Academic Program, 3. Redefine Finances and 4. Create Our Future.
  - Team members consisted of teachers, administration, classified staff and parents.
  - Series of six meetings collected input from all BUSD stakeholders
  - Created Spending Reduction Plan recommendations to the BUSD School Board.
- March 1, 2017 BUSD Board approved a budget reduction plan of 1.45 million dollars for the 2018/19 school year.
- Budget reduction plan implemented beginning in the 2018/19 school year to regain fiscal health and solvency.
- In addition, repeatedly noted by the DSPT and subsequent teams to consolidate the current 10 LCAP goals and multiple sub-goals into a few overall arching district strategic plan goals.

# Local Control Accountability Plan (LCAP)

The LCAP is a three-year plan that describes the goals, actions, services, and expenditures to support positive student outcomes that address state and local priorities. The LCAP provides an opportunity for local educational agencies (LEAs) to share their stories of how, what, and why programs and services are selected to meet their local needs.



## Stakeholders' Meetings



# Simplified Goals:

## Goal 1:

### *Increase Student Success and Support Student Learning*

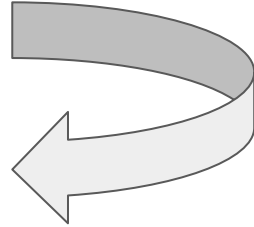
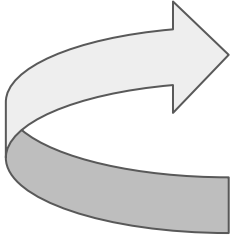
- Ensure quality learning for each and every student to reach their potential



## Goal 2:

### *Increase Connectedness, Involvement and Positive School Environments*

- Ensure a positive and respectful school climate for students, staff and families which includes positive school cultures, safe, secure accessible and efficient classroom, facilities and grounds.



# *Investments Towards Our Future*

*Collaborative work accomplished to date that will help us guide us to create our new LCAP:*

- ★ [2017-18 District Strategic Planning Team](#)
- ★ [2018-19 Focus on the Future](#)
- ★ [LCAP Stakeholders Advisory Meetings](#)
- ★ Surveys
- ★ Other input
- ★ [Local Control Accountability Plan \(LCAP\) Advisory Notes](#)



# LCAP Stakeholders' Input: Summary

## 2018/19 LCAP Stakeholders Input

### **Student Support**

- Additional Intervention/Small group support/tutoring
- Library Staffing
- Additional VAPA
- New Curriculum
- Professional Development
- Hands on Learning
- Additional after school activities
- Smaller Class Size
- Retain Highly Qualified Staff  
(salaries and benefits that are comparable to top half of Nifty Niners Districts)

### **Social Emotional Support**

- PBIS/Restorative Practices
- Additional Counselors

### **Parent Engagement:**

- Build stronger relationships
- Parent Education Opportunities
- Parent/community engagement
- Increase effective parent communication
- EL classes for parents

### **Facilities**

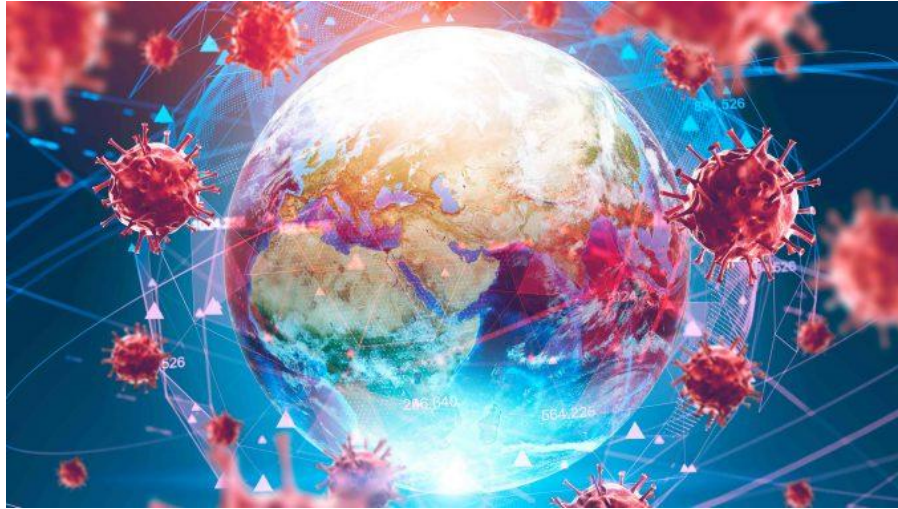
KS Kitchen  
School Beautification  
Playground Improvements

# Begin with the end in mind

Key questions to ask ourselves:

1. What do we need to do to support our students' success and learning?
2. What are the needs to help us connect to our students, parents, staff and greater community?

And then the unexpected happened...



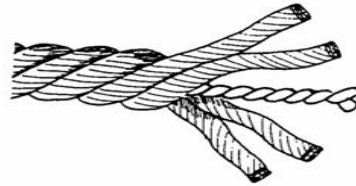
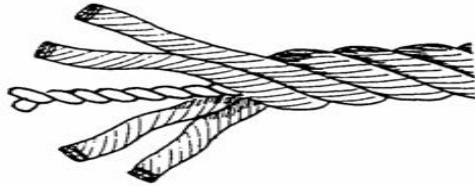
# Goal/Purpose of DSPT 2.0

- ★ The goal of the district budget advisory committee is to provide our stakeholders with an understanding of education funding and the constraints and opportunities of the State and District budgeting process and to build the BUSD's educational communities capacity for understanding the process of budgeting and the challenges of maintaining fiscal solvency.
- ★ The purpose of the district budget advisory committee is to provide a forum for sharing of information, for stakeholders to ask questions and for the Superintendent and staff to share information and to receive input on the allocation of the District resources.
- *Information will be shared on revenues and expenditures and on the status of the State budget and the District's allocation of resources, constraints and opportunities of funding, timeline, calendar and the approval process. The meetings presentations and information will be shared with our school community.*
- ★ The purpose of the reopening planning discussions is to seek input from our stakeholders regarding 2020/21 school year mitigation measures and considerations based on current guidelines.

# A New Approach:

Today we start to:

1. Reexamine our budget based on the current situation.
2. Create a viable solution to educate our students during for 2020/21



# Doing More with Less

- This fall, schools will be asked to do more (social distancing and safety measures) with fewer resources.
- We must prepare for this and proactively communicate our needs and challenges to lawmakers and all stakeholders.





## Immediate Action (taken 4/29/20):

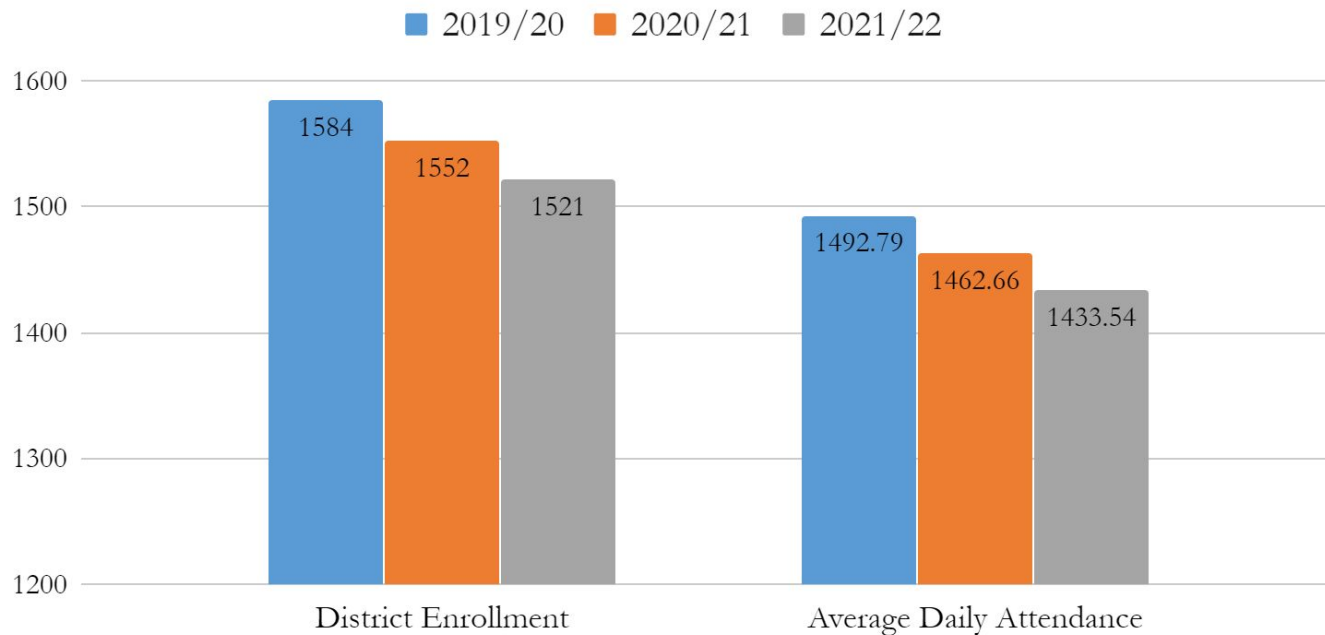
1. Implemented a spending freeze immediately, this means **ALL** expenditures budgeted for or not need to be approved by our CBO and Superintendent.
2. We are delaying non-essential purchases
3. We are delaying discretionary purchases
4. As we make our cuts we will develop a priority add-back list
5. We need to reserve cash: "Cash is king"
6. Adopted resolution to authorize inter-fund borrowing for 2019-2020 and 2020-2021
7. Board established a line of credit with the County
8. We are freezing all hiring. All supervisors need to discuss all vacant positions with Superintendent.

# Budget Updates

Dr. Chris Kim, CBO



## Enrollment Projections (2nd Int.)





# BELLEVUE UNION SCHOOL DISTRICT

---

## Revenue Projections (2nd Int.)

Projection	FY 19/20	FY 20/21	FY 21/22
LCFF	\$19,375,889	\$19,055,656	\$19,190,656
Federal	\$1,305,144	\$1,305,173	\$1,305,673
State	\$2,212,490	\$1,613,195	\$1,626,695
Local	\$652,311	\$641,975	\$653,875
Transfers In / Out	\$0	\$180,000	\$0
Total Revenue	\$23,545,833	\$22,795,999	\$22,776,899
% Change in Revenue		-3.18%	-.08%

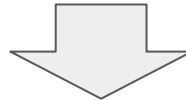
---



# BELLEVUE UNION SCHOOL DISTRICT

## Expenditure Projections (2nd Int.)

Projection	FY 19/20	FY 20/21	FY 21/22
Certificated Salaries	\$7,725,595	\$7,725,595	\$8,198,095
Step and Column :		\$135,500	\$136,750
Cost of Living Adjustment :		\$186,500	\$195,000
Other Adjustment :		\$150,500	<i>(Included)</i>
Classified Salaries	\$2,772,344	\$2,772,344	\$2,896,544
Step and Column :		\$45,100	\$46,350
Cost of Living Adjustment :		\$79,100	\$80,400





# BELLEVUE UNION SCHOOL DISTRICT

## Expenditure Projections (continued)

Projection	FY 19/20	FY 20/21	FY 21/22
Benefits	\$3,814,418	\$4,023,350	\$4,540,900
Estimated + H&W Benefits:		\$445,000	<i>(Included)</i>
Books and Supplies	\$732,150	\$734,950	\$740,600
Services and Other	\$7,353,237	\$7,431,000	\$7,525,000
Estimated Savings Sp. Education:		-\$350,000	-\$350,000
Other Financing Uses		\$700,000	\$700,000
Capital and Other Outgo	-\$38,373	-\$38,373	-\$38,373
Total Expenditures	\$22,359,372	\$24,040,566	\$24,671,266



# BELLEVUE UNION SCHOOL DISTRICT

## Ending Fund Balance & Reserves (2nd Int.)

Projection	FY 19/20	FY 20/21	FY 21/22
Beginning Fund Balance	\$3,672,907	\$4,859,372	\$3,614,805
Revenue	\$23,545,837	\$22,795,999	\$22,776,899
Expenditures	\$22,359,372	\$24,040,566	\$24,671,266
Net Surplus / (Deficit)	\$1,186,466	-\$1,244,567	-\$1,894,367
Projected Ending Fund Balance	\$4,859,372	\$3,614,805	\$1,720,438
Total Unrestricted Reserves:	17.11%	11.98%	5.11%



## **May Budget Revisions Updates**

- January 2020 Budget vs. May 2020 Budget
    - \$41.2 Billion Loss in State Revenue
  - May Budget Revision and Personal Income Tax Uncertainty
    - $\text{PIT} = \frac{2}{3}$  of General Fund Revenue
    - Delay of Income Tax Filing Deadline, April 15 to July 15
    - Unemployment Rate in April 2020 = 15.2%
  - August Revision Likely
-





## Projected Fiscal Impacts

- Cash Deferrals
    - June 2020 Apportionment → FY 2020/21
      - \$19,245,000 of \$23,515,000 (82%) Received
    - April, May, June 2021 Apportionment → FY 2021/22
  - 10% Reduction to LCFF, Concentration, and Supplemental Grants:
    - Base Grant per ADA for K-3 drops from \$7,880 to \$7,092
    - Grades 4-6 drops from \$7,999 to \$7,199.
-



## **Planning Assumptions**

- 0% Cost of Living Assumptions
  - Cash must be positive in all funds on June 30th
  - Assume Reductions to:
    - State Aid
    - Property Taxes – may be reduced
    - Education Protection Account Entitlement (Prop 30)
    - Lottery Funds
    - Local Funds
-



## Budgetary Next Steps

- **6/05/20:** Updates to LCFF Calculations and Multi Year Projections (6/5/20)
  - **6/16/20:** FY 2020/21 Budget Available for Public Inspection (6/16/20)
  - **6/23/20:** FY 2020/21 Budget Public Hearing (6/23/20)
  - **6/30/20:** FY 2020/21 Budget for Board Adoption (6/30/20)
  - **6/30/20:** FY 2019/20 Fiscal Year Close
  - **8/15/20:** Estimated August Budget Revise
  - **9/15/20:** FY 2019/20 Unaudited Actuals for Board Review
  - **12/15/20:** FY 2020/21 1st Interim Budget Update
-

Break

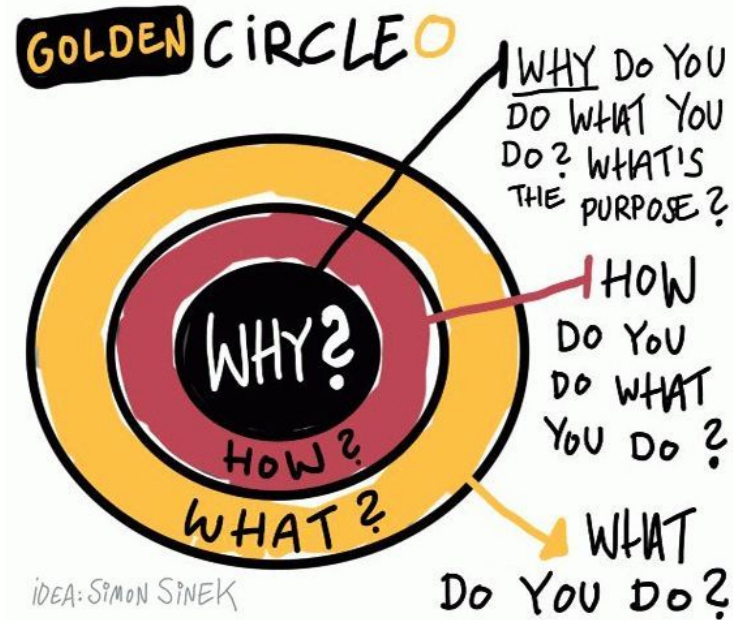
# School District Updates

Dr. David Alexander, Superintendent

Bellevue Union School District 2020/21  
School Year ready or not...  
*Re-Opening*

# Stay with your Why...

Our planning is in the outer circles of How and What, but our actions reveal our value and our why.



A green swirl graphic that frames the word "Mission:" and the phrase "Inspire learning."

**Mission:**  
*Inspire learning.*

**Vision:**  
*Engaging and ❤️ (valuing/caring)  
for our families, students and staff  
to empower our community.*

Mission: Why? Why do we exist? Fundamental Purpose

Vision: What? What must our school become to accomplish our purpose? Compelling Future

Values: How? How must we behave to achieve our vision? Collective Commitments

Goals: HOW WILL WE MARK OUR PROGRESS? Targets and Timelines



## *Planning Tools:*

- *CDC Guidelines for Opening Schools*
- *Sonoma County School Re-occupation Mitigation Plan: Operational Considerations (draft is currently embargoed pending public health guidance)*
- *Local School Checklist- Mitigation Measures*
- *City of Santa Rosa: Santa Rosa City Schools elementary and 8 feeder elementary districts, June 2020 (draft dependent on Sonoma County School Re-occupation Mitigation Plan: Operational Considerations)*

When you try to pick out anything  
by itself, we find it hitched to  
everything else in the universe.

- John Muir from My First Summer in the Sierra 1911

# Essential Questions

## Of a Professional Learning Committee

- What do we expect our students to learn? (Goals/Expectations)
- How will we know they are learning? (Assessment)
- How will we respond when they don't learn? – Intervention.
- How will we respond if they already know it? (gifted)

# School Checklist - Mitigation Measures

City of Santa Rosa: Santa Rosa City Schools elementary and 8 feeder elementary districts  
June 2020

*Source documents: CDC Guidelines for Opening Schools*

*Sonoma County School Re-occupation Mitigation Plan: Operational Considerations*

**The tentative plan is to utilize this checklist across the school districts to provide uniformity and will be available after this Friday.**

- **Classroom:**
- **Campus Wide:**
- **Transportation:**
- **Health and Safety Guidelines:**
- **Instruction:**
- **Childcare:**
- **Staffing**
- **other**

# Survey of Parents and Staff

- A couple of our local districts have surveyed parents and staff to identify needs and asked for input regarding the educational program that may be available options.
- After the public health and SCOE have provided clearer direction BUSD will reach out to our community to identify needs based on resources that can be provided.
- Educational programs may be offered according to the needs of our district.

## *In Summary...*

1. There will be a new normal
2. Great uncertainties remain
3. Do more with less
4. We will figure it out
5. Stay Strong!

# Next Meeting Dates:

Tuesdays: (June 9th-cancelled), 16th and 23rd 9:00 a.m. to noon  
via zoom meetings  
(forecasting a prolonged process)