

Eighth Biennial/Triennial Assessment of the District 11 Mill Levy Override (MLO) Spend Plan

Colorado Springs District 11

June 2022



PUBLIC
CONSULTING GROUP

TABLE OF CONTENTS

- I. INTRODUCTION.....3**
 - Background 3
 - Project Purpose and Research Approach 4
 - Guiding Questions4
 - Organization of the Report 5
 - Data Collection 5
 - Data and Document Analysis5
 - Focus Groups and Interviews5
 - Staff and Parent and Community Surveys5
 - Acknowledgement..... 6

- II. CURRENT CONTEXT OF DISTRICT 11 8**
 - Mill Levy Override Funding 2000 and 2017 8
 - Accountability for the MLO 10
 - The District in 2022 11
 - Enrollment.....12
 - Academic Achievement14
 - Finances15

- III. MLO ALIGNMENT TO DISTRICT PLANS AND INITIATIVES 18**
 - D11 Strategic Plan 18
 - Academic Master Plan 20
 - Facilities Plan 21
 - Unified Improvement Plan..... 21
 - Technology Plan 22
 - Guiding Documents’ Alignment..... 22
 - Alignment Analysis.....26
 - Alignment: Survey Results28

- IV. MLO MANAGEMENT: ACCOUNTABILTY AND TRANSPARENCY30**
 - MLO Governance Plan 30
 - Mill Levy Override (MLO) Citizens’ Oversight Committee 30
 - MLO Assessments: Performance Excellence Assessment Reports 32
 - Program Implementation Plans (PIP).....33
 - MLO Annual Summary.....34
 - District 11 Staff..... 35
 - PIP Owners.....36
 - Public Accountability and Transparency..... 36
 - Communication36
 - Transparency.....37

- V. STAKEHOLDER ENGAGEMENT39**
 - Communication about D11 39
 - Staff Understanding of MLOs and PIPs 39
 - Stakeholder Familiarity with the MLO and PIPs 40
 - Student Feedback 41
 - High School.....41
 - Middle School42

Points of Pride.....	42
Areas for Improvement	43
Impact of MLO Funds.....	44
VI. RECOMMENDATIONS	47
2019 MLO Assessment Recommendations	47
Recommendations from the Current (2022) Assessment.....	49
MLO Management: Accountability and Transparency	49
Stakeholder Engagement.....	50
VII. APPENDIX	51
Assessment Team	51
Documents reviewed for this report	52
Data reviewed for this report:.....	53
2019 MLO Assessment Recommendations	53

TABLE OF FIGURES

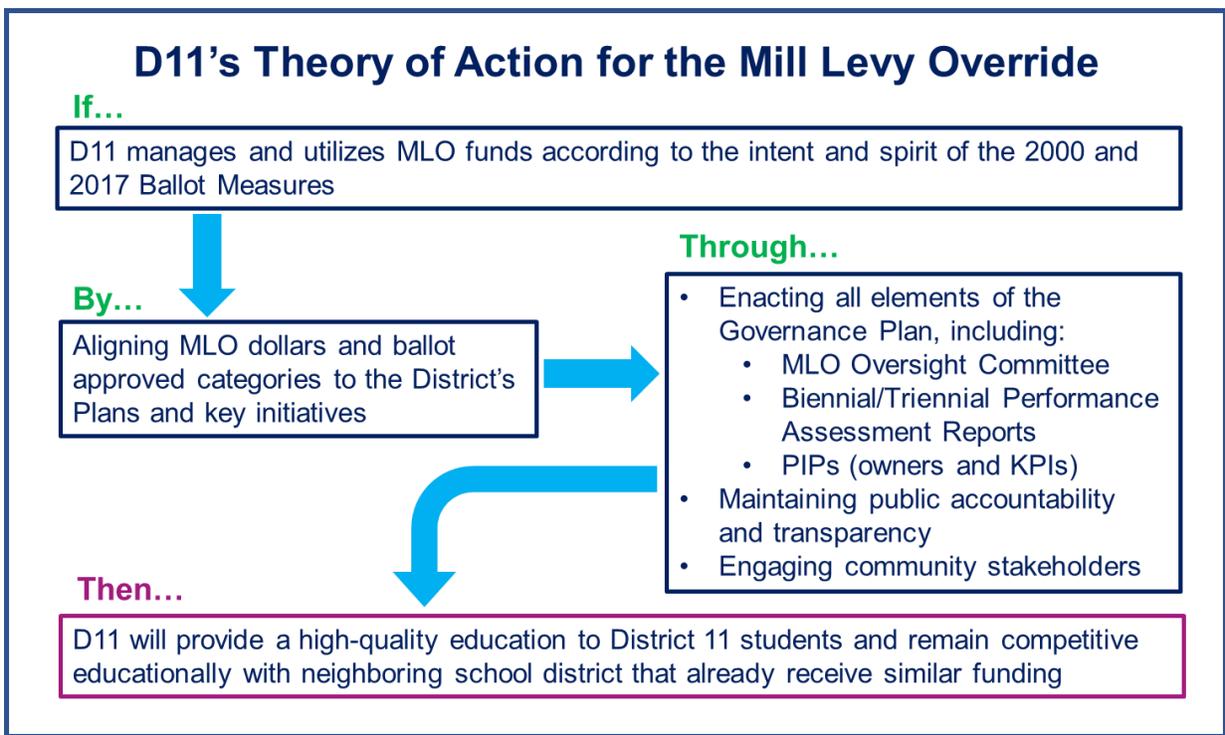
Figure 1. Survey Responses by Stakeholder Group and Year of MLO Assessment	6
Figure 2. Summary of D11 Allocations	10
Figure 3. D11 Enrollment from 2017 to 2022.....	12
Figure 4. Student Population by Ethnic/Racial Group (2014, 2018, 2022)	13
Figure 5. Free and Reduced Lunch, Special Education, and English Learners by Ethnic/Racial Group (2014, 2018, 2022)	14
Figure 6. Colorado Springs School District Accreditation Rating (2018 and 2019)	15
Figure 7. General Fund Proposed Approved Budget, 2021-22	16
Figure 8. Alignment of PIPs with District's Guiding Documents (Strategic Plan, Academic Master Plan, Facilities Plan, Technology Plan, and Unified Improvement Plan)	23
Figure 9. Connection to D11 Priorities and Initiatives, Stakeholder Perceptions, MLO Survey 2022	29
Figure 10. Mill Levy Override Public Feedback Form	31
Figure 11. Program Implementation Plans for the 2000 and 2017 Mill Levy Overrides	33
Figure 12. Primary source of information about activities related to the MLO, MLO Survey 2022.....	37
Figure 13. Perceptions of Transparency in Management of MLO funds, MLO Survey 2022	38
Figure 14. Communication about D11 priorities and expectations, MLO Survey 2022.....	39
Figure 15. Understanding of the MLOs and PIPs, MLO Staff Survey 2022	40
Figure 16. Familiarity with the MLO and PIPs, MLO Survey 2022	41
Figure 17. Areas Identified as "Very Important" to Strengthen D11, MLO Survey 2022	43
Figure 18. Perception of positive impact of MLO funds on D11/schools, MLO Survey 2022	45
Figure 19. Areas of impact of the MLOs, MLO Survey 2022	46
Figure 20. Implementation Evaluation Scale	47

I. INTRODUCTION

BACKGROUND

The Mill Levy Override (MLO) funding is woven into the fabric of D11 and its operations. It has provided steady monies to a relatively consistent set of educational initiatives, ranging from smaller class sizes to teacher training to technology and curricular purchases, for an entire generation of students. A five-year-old entering kindergartner in 2000, when the first MLO passed, is now a 27-year-old adult. A student who was starting high school in 2017 following the passage of the second MLO is now a graduate, having received greater access to school counselors, nurses, psychologists, and social workers and improved school buildings during their final years in D11. At a time when basic education funding seems not to stretch far enough and a District’s appetite to stay the course with initiatives it has started often wanes, the story of the MLO and its impact in D11 schools shines as a unique one.

When the 2000 MLO ballot measure was passed, the District entered into a proverbial contract with its community, publicly promising to remain transparent in its use of the funds and dedicate them to the purposes approved by the taxpayers. The same agreements held true for the 2017 MLO. In both cases, the intent behind the MLO was to enable to District to provide a high-quality education to its students and to remain competitive with innovative programming. The District held to this theory of action, that if it managed and utilized MLO funds according to the expectations of the community, aligned the funding to key District initiatives and the ballot approved categories, and enacted a Governance Plan for public accountability and oversight, then students will receive a top-rate education in a competitive educational landscape.



A theory of action is a hypothesis about what will happen when a set of strategies is implemented. In other words, “a theory of action is a connected set of propositions, a logical chain of reasoning that explains how change will lead to improved practices. It ‘connects the dots’ explaining in a commonsense way which

features are expected to produce results that lead to the final desired outcome.”¹ Developing a theory of action requires using critical judgment about which strategic actions will lead to what desired results. It is the process of connecting what an organization plans to do with what they hope to get.

When District leaders think about the changes that are necessary in schools, they often focus solely on the outcomes they would like to produce. Thinking through a theory of action allows educators to more clearly see the chain of changes that will have to happen for the intervention to be successful. The theory of action under which D11 has been operating is clear; the MLO would have significant, positive impact on D11's schools and the District's ability to maintain its student population in a state that promotes and allows for school choice across traditional District boundaries. Through PCG's analysis of the MLO funds in 2016, 2019, and now in 2022, we believe this theory of action is still relevant and is an important way to describe the purpose and expected impact of the MLO.

With the passage of time, D11 of 2022 is a much different place than it was in 2000. Demographic shifts and enrollment declines, coupled with the impact of the COVID-19 pandemic on students' learning and support needs and District leadership changes, are converging to create an even more challenging environment that we have noted in prior years. In this report, we will describe the strengths of the MLO management and oversight and highlight areas that could be improved in order to realize the end result D11 seeks – a high-quality education for all of its students.

PROJECT PURPOSE AND RESEARCH APPROACH

In December 2021, Colorado Springs District 11 (D11) selected Public Consulting Group LLC (PCG) to conduct the 2022 assessment of the 2000 and 2017 Mill Levy Override (MLO) Spend Plans. The assessment, which is conducted on a triennial basis, provides a third-party, independent review to:

- 1) Determine whether the MLO management program and structure is meeting the intent of the 2000 and 2017 MLO Tax Ballot questions.²
- 2) Report on the District's progress toward stated goals since the last MLO review; and
- 3) Assess the alignment of the MLO with District initiatives and the current Strategic Plan.

The triennial MLO assessment is one of several mechanisms used in D11 to promote accountability and transparency. PCG conducted the last review in 2019. This is the eighth review conducted of the performance plan since the passage of the first MLO in 2000. The terms “assessment” and “review” are used throughout this report interchangeably and refer to the third-party, independent review of the District's 2000 and 2017 MLOs.

Guiding Questions

This report describes the management and oversight of the MLO, the current state of the MLO initiatives in D11 and is designed to guide the District toward continuous improvement and effective use of its resources. It examines the following guiding questions:

1. What is the **current context** of District 11 in relation to the 2000 and 2017 MLO?
2. How are the MLOs **managed and documented**?
3. What is the awareness of the **Performance Implementation Plans (PIPs)**, and what initiatives has the District undertaken for each?

¹ <http://www.nysed.gov/common/nysed/files/principal-project-trimmed-collection-of-theories-of-action.pdf>

² The 2000 MLO required a biennial performance review. In 2016, the District 11 Board of Education approved an extension of the frequency of the performance reviews to at least every three years to more effectively utilize resources.

4. What are **stakeholder perceptions** of: communication about the MLOs; transparency with regards to decision-making, finances, and activities conducted with MLO funds; the impact of MLO funds and the connection with D11 initiatives; points of pride and opportunities to strengthen the District?
5. How do the **MLOs support the Strategic Plan and other strategic initiatives** in the District (e.g. Academic Master Plan, Facilities Master Plan, Unified Improvement Plan (UIP))?
6. **How has D11 responded to recommendations** from previous assessments?
7. What are **recommendations for the future implementation** of the 2000 and 2017 MLO?

ORGANIZATION OF THE REPORT

The organization of this report is aligned to the components of the theory of action. The introductory chapter sets the frame for the report through the theory of action and describes the review methodology. Chapter II describes the history of the MLO including its intended purpose, the current state of District 11 including enrollment trends, demographics, and outcomes. Chapter III examines the alignment between the MLOs, D11's Strategic Plan and other District initiatives. Chapter IV examines the management and documentation of the MLOs. Chapter V examines stakeholder perceptions regarding communication, transparency, the impact of MLO funds, areas of success in D11, and areas to strengthen D11. Chapter VI examines recommendations from the previous review and provides recommendations based on findings from the 2022 review to support the implementation of the MLOs into the future.

DATA COLLECTION

During spring 2022, PCG conducted a mixed-methods study of the 2000 and 2017 MLO. The findings and recommendations related to the MLO and PIPs are grounded in a comprehensive analysis of three data sources: 1) data and document analysis, 2) focus groups and interviews, 3) staff and parent/community surveys. Details of each data source are described below.

Data and Document Analysis

PCG reviewed current documents related to the MLO including accountability reports, the D11 budget, School Board documents, agendas and minutes of the Mill Levy Override Oversight Committee (MLOOC) and student demographic, programmatic, and outcomes data. In addition, PCG reviewed information about the Strategic Plan and its implementation including D11 strategic initiatives undertaken since the last review. A list of documents consulted for the review is located in the appendix.

Focus Groups and Interviews

PCG conducted a series of interviews and focus groups with 48 stakeholders, including District leaders and staff, school board members, members of the MLOOC, and students. PCG collaborated with District staff to identify the most appropriate stakeholders who could discuss the topics of the MLO assessment. All focus groups and interviews were conducted virtually for the 2022 review in February and March of 2022. Each interview and focus group lasted from 30-60 minutes.

Focus group questions were developed by PCG for this project in collaboration with District staff, based on previous reviews and the current context. Questions were tailored to each role or stakeholder group. Responses were recorded in a set of notes taken during the meetings. PCG systematically reviewed these notes to identify themes within and across stakeholder group responses.

Staff and Parent and Community Surveys

PCG developed two online surveys for the purpose of this MLO assessment: 1) a staff survey and 2) a parent and community survey. Survey questions for each were developed in collaboration with D11 staff. Some survey items were developed for the 2016 and 2019 assessments and were also included in the

2022 administration to gauge changes in stakeholder perceptions. Other survey items were newly developed for this assessment. In 2022, the survey items were brought into greater alignment. While some items are unique to the perspective of the respective stakeholder perspectives, for the 2022 survey, most questions were asked of all stakeholders. The parent and community survey was translated into Spanish by D11.

Both surveys were administered from April 4-15, 2022. The link to the staff survey was sent by email to all D11 staff by the District Communications Department. The link for the parent and community survey was shared on the D11 app and was also sent via email by the Communications Department. One reminder was sent during the second week for each stakeholder survey.

A total of 777 District 11 staff members³ and 728 parent and community members responded to the MLO surveys. Overall, when compared to responses to surveys for the 2019 MLO assessment, staff responses decreased (1,315 in 2019) while the number of parent and community responses increased. Figure 1 shows survey responses by stakeholder group from 2016-2022.

Fifty-one District staff and 726 school-based staff responded to the survey. Among school-based staff, 54 of 55 District 11 schools and all five alternative programs as well as Adult and Family Education were represented among respondents.

Among respondents to the Parent and Community Survey, 41 (6%) did not currently have a student enrolled in a D11 school. Parent and community members represented 54 (of 55) D11 schools and all five alternative education opportunities.

Figure 1. Survey Responses by Stakeholder Group and Year of MLO Assessment⁴

Stakeholder Group	2016*	2019	2022
Staff	450	1,315	777
Parent and Community	N/A	690	728

Responses to selected survey questions appear within the main body of the report to support discussion of particular topics. For the purpose of the report, we reduced the number of response categories on the Likert items: we combined agree with strongly agree and disagree with strongly disagree responses. All open-ended responses were coded by theme by PCG staff and are discussed in the body of the text.

ACKNOWLEDGEMENT

The triennial assessment could not be completed without the support of key District personnel. PCG wishes to thank Glenn Gustafson, Chief Financial Officer (Interim), Kimberly Gilstrap, Administrative Assistant, and the Mill Levy Override Oversight Committee for frequently meeting with the assessment team, providing documents and data, and facilitating the logistics of the project. We also wish to thank Dr. Nicholas Gledich, Acting/Interim Superintendent, and Dr. Michael Thomas, former Superintendent, for their support of this work.

Also, we thank Devra Ashby, Chief Communications Officer, and Dr. David Khaliqi, Executive Director of Education Insights, for their support to launch the staff and parent and community surveys. PCG wishes to

³ D11 reports that 3,405 regular employees and 600 substitute or temporary staff were invited to take the survey by email.

⁴ The 2016 MLO Review did not include a parent and community survey.

acknowledge the D11 District staff and leadership as well, who took time out of their busy schedules to talk with our team, and the hundreds of staff, parents and community members who shared their thoughts by completing the 2022 MLO assessment surveys. Finally, we thank the District 11 middle and high school students who joined us for focus groups at the end of their day to share their thoughts about their schools.

II. CURRENT CONTEXT OF DISTRICT 11

MILL LEVY OVERRIDE FUNDING 2000 AND 2017

The Mill Levy Override has a long history in District 11 and is comprised of two separate ballot initiatives to provide additional funding to support District 11 operations.

In November 2000, District taxpayers approved a \$26.9 million ballot issue (Ballot Issue #3B) to supplement educational funding in D11, demonstrating their commitment to their District schools. This money was earmarked to be used to fund specific ballot items related to the following educational efforts in the District:⁵

1. Reduction in class size
2. Attraction and retention of superior teachers and support staff
3. Core academic subjects such as mathematics, reading, writing, and science
4. Purchase of classroom instructional materials and supplies
5. Increase in teacher training
6. Expansion in student assessment and interventional support
7. Library support
8. School safety and security
9. School start times
10. Technology integration in the classroom
11. Citizens oversight committee to develop independent comprehensive performance plan

The District then adopted a “spending plan,” which broadened these 11 targeted areas into 25 specific program implementation plans (PIPs). The PIPs include:

- Program line-item description
- Ballot question alignment
- Explanation and use of funds description
- Budget for each year
- FTE Authorizations for each year
- Plan amendments

The District began collecting monies from the 2000 MLO in early 2001. To minimize the impact on property owners, the MLO funding was phased in over several years. All PIPs were expected to be implemented in 8 to 10 years as the MLO funding was phased in. The 2000 MLO ballot measure did not include an inflationary clause, so the funds, though they renew each year, remain static. The District began to receive the full additional annual funding of \$26,998,822 in 2009.

In November 2017 an additional Mill Levy Override was approved by voters to fund education (Ballot Issue #3E) in Colorado Springs. Like the 2000 MLO, the 2017 MLO was designated to provide additional funding to specific educational needs in the District. These include:

1. Attracting and retaining high quality teachers and support staff, not to include administrators, by offering salaries and benefits that are competitive to other school districts
2. Extending the life of existing schools by repairing, maintaining, and modernizing aging buildings

⁵ <https://www.d11.org/cms/lib/CO02201641/Centricity/Domain/181/MLO%202000%20and%202017%20Election%20Questions.pdf>

3. Expanding technology access to more students by upgrading and replacing outdated computers and equipment
4. Providing equitable funding for charter schools
5. Improving student safety and security by adding a school resource officer at every middle school
6. Supporting student success by providing more school counselors, nurses, psychologists, or social workers
7. Reducing long-term interest costs by paying off existing debt sooner

The 2017 MLO funding follows the same structure as the 2000 MLO, with the development of PIPs that align to the ballot items and a phase-in of funding over six years. The District received the first portion of funding in the amount of \$40 million in FY17-18. The District received \$43.4 million in FY18-19, \$46.3 million in FY19-20 (due to a plan amendment increase in PIP 8 Capital Renewal/Replacement), and \$45.6 million in FY20-21. By 2023-2024, the amount is projected to be \$46.4 million. Due to the inflation clause built into the 2017 MLO, the funding amount has risen over the past few years. The District has built up enough money in the MLO in collaboration with the Bond Debt Reduction fund to completely pay off the bond by the end of the 2022 calendar year. Additionally, in FY22-23, all 2017 PIPs will be fully funded and at full implementation. The total of both Mill Levy Overrides, in FY 2020-21, is projected to be approximately \$73.3 million. A summary of the allocations by PIP over time is included below.

Figure 2. Summary of D11 Allocations

Colorado Springs School District 11								
MLO Allocation Phase - In								
2000 Mill Levy Override (MLO)								
#	Item	Original Amount	Revised Total	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25
1	Employee Compensation	6,610,000		0	0	0	0	0
1B	Employee Comp - Combined	0	9,760,550	9,760,550	7,360,000	7,360,000	7,360,000	7,360,000
2	Restore Class Size	1,498,588		0	0	0	0	0
2B	Class Size Reduction	0	1,300,630	1,300,630	1,300,630	1,300,630	1,300,630	1,300,630
2C	Middle School Implementation	0	2,621,955	2,621,955	2,621,955	2,621,955	2,621,955	2,621,955
3	Middle School Staff	1,297,561	0	0	0	0	0	0
4	Elem Class Size	945,400	0	0	0	0	0	0
5	Instructional Supplies & Mats	1,774,030	1,653,546	1,653,546	1,653,546	1,653,546	1,653,546	1,653,546
6	LRTs/TLCS	2,129,770	2,129,770	2,129,770	2,129,770	2,129,770	2,129,770	2,129,770
7	Staff Development	300,000	0	0	0	0	0	0
7B	Instructional & Tech Staff Dev	0	372,834	372,834	372,834	372,834	372,834	372,834
8	Start Times	1,000,000	0	0	0	0	0	0
9	CITs/LTEs	2,200,000	0	0	0	0	0	0
9B	CITs/LTEs/Security/EDSS	0	2,530,322	2,530,322	2,530,322	2,530,322	2,530,322	2,530,322
10	High School Class Size	466,850	0	0	0	0	0	0
11	Technology	3,600,000	0	0	0	0	0	0
11B	Technology	0	3,675,000	3,675,000	6,075,550	6,075,550	6,075,550	6,075,550
12	ESL/SpecEd/GT	933,700	933,700	933,700	933,700	933,700	933,700	933,700
13	Technology Training	100,000	0	0	0	0	0	0
14	Full Day Kindergarten	1,400,550	0	0	0	0	0	0
15	Substitute Teachers	250,000	0	0	0	0	0	0
16	Beginning Teacher Salary	400,000	0	0	0	0	0	0
17	Software Upgrades	75,000	0	0	0	0	0	0
18	Security Staff	220,322	0	0	0	0	0	0
19	Crossing Guards	100,000	0	0	0	0	0	0
20	Align DALT/Assessments	200,000	200,000	200,000	200,000	200,000	200,000	200,000
21	Charter School Funding	1,287,051	0	0	0	0	0	0
21A	Charter School Funding - External	0	1,287,051	1,287,051	1,287,051	1,287,051	1,287,051	1,287,051
21B	Charter School Funding - Internal	0	433,464	533,464	433,464	533,464	533,464	433,464
22	Assessment Staff	110,000	0	0	0	0	0	0
23	Performance Review	100,000	0	0	100,000	0	0	100,000
24	Contingency	0	0	0	0	0	0	0
2000 MLO Totals		\$26,998,822	\$26,898,822	\$26,998,822	\$26,998,822	\$26,998,822	\$26,998,822	\$26,998,822
2017 Mill Levy Override (MLO)								
#	Item	Original Amount	Revised Total	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25
1	Comprehensive Support Model	4,500,000	3,000,000	3,000,000	3,500,000	4,500,000	4,500,000	4,500,000
1B	Inflation Factor #4				760,000	760,000	760,000	760,000
2	Teacher Compensation	8,000,000	9,000,000	9,000,000	8,000,000	8,000,000	8,000,000	8,000,000
2B	Inflation Factor #1	0	0	1,423,838	1,423,838	1,423,838	1,423,838	1,423,838
3	ESP Compensation	5,500,000	5,500,000	5,500,000	5,500,000	5,500,000	5,500,000	5,500,000
3B	Inflation Factor #2		991,132	991,132	991,132	991,132	991,132	991,132
4	School Security Enhancements	375,000	375,000	375,000	375,000	375,000	375,000	375,000
5	Class Size Reduction	1,750,000	1,750,000	1,750,000	1,750,000	1,750,000	1,750,000	1,750,000
6	Technology Replacement Plan	1,000,000	0	0	1,000,000	1,000,000	1,000,000	1,000,000
7	Technology Support Staff	320,000	320,000	320,000	320,000	320,000	320,000	320,000
8	Capital Renewal/Replacement	17,555,000	10,955,000	10,955,000	15,155,000	17,155,000	17,405,000	17,405,000
8B	Inflation Factor #3	0	1,036,311	1,036,311	1,036,311	1,036,311	1,036,311	1,036,311
9	Charter School Funding	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000
10	Bond Debt Reduction	0	8,100,000	8,100,000	3,400,000	250,000	0	0
11	Tax Collect Fee	0	180,000	180,000	180,000	330,000	330,000	330,000
2017 MLO Totals		\$42,000,000	\$44,207,443	\$45,631,281	\$46,391,281	\$46,391,281	\$46,391,281	\$46,391,281
Combined MLO Totals		\$68,998,822		\$72,630,103	\$73,390,103	\$73,390,103	\$73,390,103	\$73,390,103

Accountability for the MLO

Since the passage of the first MLO, D11 has developed a robust accountability and reporting structure for managing MLO funds. At the core of it is a commitment to transparency. The accountability and reporting mechanisms for the MLO were established with the 2000 MLO and are comprised of the Mill Levy Override Oversight Committee (MLOOC), the biennial/triennial performance assessments, MLO annual summaries, and the MLO governance/spending plan. District 11 was recognized for the level of financial transparency for seventeen straight years by the Association of School Business Officials (ASBO)'s Meritorious Budget Award.

Additional information on the MLO management is described below in Chapter IV.

THE DISTRICT IN 2022

When PCG conducted the 2019 review, we assessed that D11 was on an upward trajectory, buoyed by its new Superintendent Dr. Michael Thomas, its progressive, new Strategic Plan, and its plans to scale the initiatives supported by the 2017 MLO. The Strategic Plan was designed to serve as “the blueprint for change and a framework for decision making for the future.”⁶ Less than a year later though, the COVID-19 pandemic shuttered D11 schools for several months and has considerably changed school operations and students’ learning ever since. While implementing the Strategic Plan remained a top priority, more urgent concerns emerged, such as the need for a 1:1 Technology program so that every student and teacher could have an electronic device (i.e., iPad, Chromebook, or Dell laptop). According to focus group participants, the District provided professional development courses for staff to help bring approximately 3,000 staff, 25,000 students and their families into a remote-learning world. Following the pandemic closures in spring 2020, larger cultural shifts and racial unrest across the United States also began to impact schools, with many districts and colleges issuing statements affirming their commitment to racial equity and calling for change. Equity and inclusion, already a foundational part of its Strategic Plan with its mention of building a “collaborative culture” and enacting “equitable practices to meet the unique needs of all” became central to D11’s focus.

Other significant endeavors were also underway for D11 during the 2021-22 school year. The District engaged in a year-long process to update its Academic and Facilities Master Plans. Additionally, guided by community input from a 2021 Community Input Survey, as well as the Academic Master Plan and Facilities Master Plan process, the District finalized a three-year (2021-2024) spending plans for \$59.8M of Elementary and Secondary School Emergency Relief Funds (ESSER) funds in October 2021.⁷ Of this, funding was committed to mitigating pandemic related learning loss through extra tutoring, social-emotional supports, school break academies and facilities improvements such as Heating, Ventilation, and Air Conditioning (HVAC) system upgrades. The District also attempted, unsuccessfully, to have taxpayers pass a bond measure for \$350 million for school facilities construction and capital improvements. This defeat was a significant setback for the District, as improving school buildings has been a core part of its strategy to increase student enrollment.

The 2021-22 school year has been equally momentous. With the installation of three newly elected Board members, new priorities emerged. Additional leadership changes within the District also began. In February, Chief Financial Officer (CFO) Brian Cortez stepped down after a brief tenure and the former CFO Glenn Gustafson stepped in to act in an interim capacity on a part-time basis. In March 2022, Dr. Michael Thomas separated from the District, and Dr. Nicholas Gledich, D11’s superintendent from 2009 to 2018, assumed the position of Acting/Interim Superintendent. At the time of the publication of this report, the search for a new Superintendent was underway.

In our 2016 and 2019 reports, PCG identified three areas of concern for the Board and Superintendent: declining enrollment, stagnant student achievement, and limited District finances. As a new superintendent takes the helm of D11, these areas will remain a central focus, as will healing a community divided by the District’s leadership changes, pandemic response, and differing philosophies on equity and inclusion.

⁶ <https://www.d11.org/StrategicPlan>

⁷ <https://www.d11.org/Page/18061>

Enrollment

District 11 provides services for 23,366 students and employs over 3,500 teachers, education support professionals, and administrators, and other staff. The District is one of the largest school districts in El Paso County.

Though it remains the 12th largest District in the state, D11 has experienced declining enrollment for decades.⁸ Over the last five years, D11 saw a 16% drop in enrollment from 27,427 to 23,366, compared to the 2% loss in enrollment reported for Colorado as a whole.

Figure 3. D11 Enrollment from 2017 to 2022

Year	Enrollment
2017 – 2018	27,427
2018 – 2019	26,395
2019 – 2020	26,040
2020 – 2021	23,885
2021 – 2022	23,366

The US Census Bureau reported in 2021 that the United States saw a drop in school enrollment from 2019 to 2020, with estimates as high 2.9 million students leaving school. This drop has likely been exacerbated by the effects of COVID-19 since 2019, which the Bureau states could be attributed to students choosing to continue their education via remote learning or virtual/paper assignments.⁹ This was likely not a significant factor for D11, though. While just over 1,000 students opted for home-based learning in D11 in the Fall of 2020, this has declined to 379 in the Fall of 2021.

The District recognizes the critical nature of the student enrollment trend and has developed several plans to increase enrollment: offer free-after school programs at elementary schools, extend the elementary school day with staff compensation to alleviate COVID-19 learning loss and social/emotional impacts, recommend smaller class sizes from Kindergarten to 3rd grade, provide safe and welcoming environments for student via Quality Neighborhood Schools, increase diverse course offerings, and engage opportunities at Summer Bridge Program.¹⁰ According to focus groups, the District is also considering hiring a staff person to develop a targeted new student enrollment and retention strategy.

Student Demographics

The demographics of the District have stayed fairly consistent in the last eight years with trends continuing to follow the same trajectory as was reported in the 2016 and 2019 MLO assessment reports, specifically there continues to be an increased diversification of the student population with regards to race/ethnicity and socio-economic status. The 2020-21 District Overview notes that there are more than 70 different languages spoken by the student population.¹¹

⁸ <http://cde.state.co.us/cdereval/pupilcurrent>

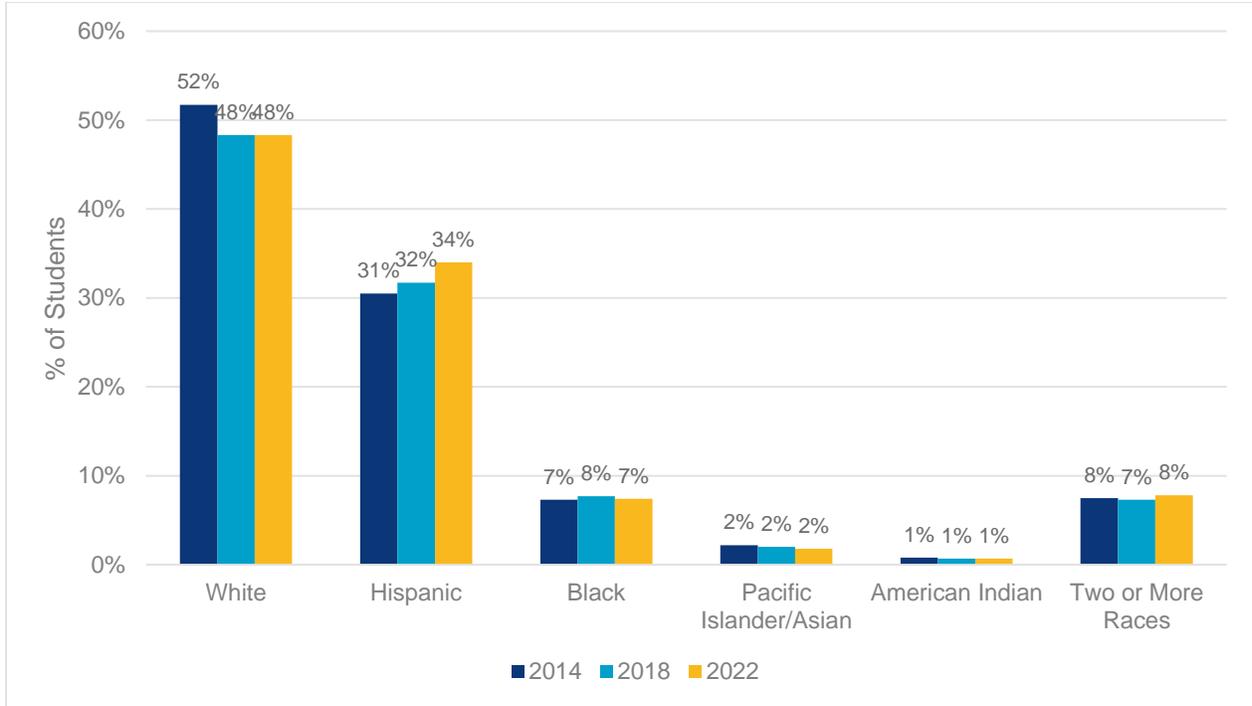
⁹ [Census Bureau Data Reveal Decline in School Enrollment](#)

¹⁰ <https://krdo.com/news/2022/04/14/district-11-faces-more-than-50-teaching-positions-cut-due-to-decline-in-enrollment/>

¹¹ 2021 D11 District Overview: <https://www.d11.org/cms/lib/CO02201641/Centricity/Domain/948/DistrictOverview.pdf>

From 2014 to 2022, the District’s Hispanic student population has increased from 31% to 34%. While the number of white students has decreased since 2014, the proportion has remained steady at 48% for the last four years.

Figure 4. Student Population by Ethnic/Racial Group (2014, 2018, 2022)¹²



In the 2021-22 school year, there were 162 students who identified as homeless, which has decreased from the 354 students reported in 2018. The percent of Special Education students in the District has remained steady over the last four years at 10% in 2022.¹³ The Free and Reduced Lunch program is an indicator used to determine poverty rates for the District and individual schools within the District.¹⁴ Despite the notable increase from 2003 when 34.8% of students were qualified for free or reduced-priced meals¹⁵, there has been a consistent decline over the last eight years. The District reported that in 2022, 53% of students qualified for free or reduced-priced meals.¹⁶ This is a decrease from 59% in the 2017-18 school year. It should be noted that free and reduced lunch percentages have fallen since the pandemic as parents/students are no longer required to submit FRL forms since all meals are free for all students.

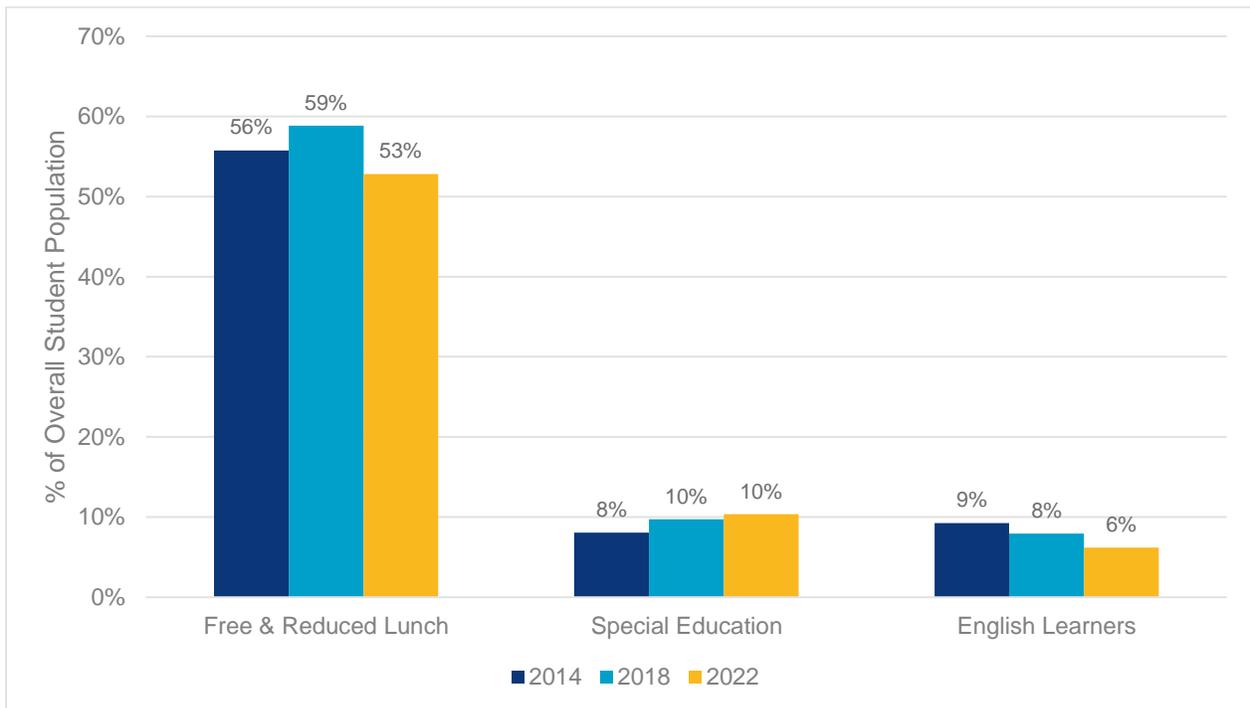
¹² <http://cde.state.co.us/cdereval/pupilcurrent>

¹³ id.

¹⁴ <http://co-ujp-cde.force.com/?dcode=1010>

¹⁵ <http://co-ujp-cde.force.com/?dcode=1010>;
<http://cde.state.co.us/sites/default/files/documents/cdereval/download/pdf/2003pm/2003f%26rbydistrictpk-12.pdf>

¹⁶ <http://cde.state.co.us/cdereval/pupilcurrent>

Figure 5. Free and Reduced Lunch, Special Education, and English Learners by Ethnic/Racial Group (2014, 2018, 2022)¹⁷

D11 continues to serve a large student population impacted by chronic stress and poverty, compounded by the stressors of the pandemic over the last two years. These factors can translate into a form of Post-Traumatic Stress Disorder (PTSD) and affect learning.¹⁸ The District has continued its efforts to create a comprehensive student support model following the passage of the MLO in 2017 and to provide more robust interventions for struggling students.

Academic Achievement

Improving student academic achievement remains a top priority for D11. The District's official accreditation rating for the 2019 school year is "Accredited with Improvement Plan," the same rating as in both 2014 and 2018.¹⁹ Districts are designated an accreditation category based on the overall percent of points earned for the official year. Performance Indicators show that the District met finance, safety, and test participation requirements. The District's percentage of points earned in the areas of Academic Achievement and Postsecondary and Workforce Readiness decreased from 2014 to 2019 while Academic Growth saw a slight increase since 2018. Data from 2018 and 2019 are included below, showing that accreditation ratings are similar over this time frame.

¹⁷ <http://cde.state.co.us/cdereval/pupilcurrent>

<http://cde.state.co.us/cdereval/2017-18pupilmembership>

¹⁸ <http://www.newyorker.com/tech/elements/what-poverty-does-to-the-young-brain>

¹⁹ <http://cde.state.co.us/>

Figure 6. Colorado Springs School District Accreditation Rating (2018 and 2019)²⁰

Performance Indicators	2018		2019	
	Rating	% of Points Earned out of Points Eligible	Rating	% of Points Earned out of Points Eligible
Academic Achievement	Approaching	47%	Approaching	47%
Academic Growth	Approaching	53%	Approaching	55%
Postsecondary and Workforce Readiness	Approaching	49%	Approaching	44%
Accountability Participation Rate	Meets 95% Participation Rate	-	Meets 95% Participation Rate	-
Finance	Meets Requirements	-	Meets Requirements	-
Safety	Meets Requirements	-	Meets Requirements	-
TOTAL		50%		49%

Finances

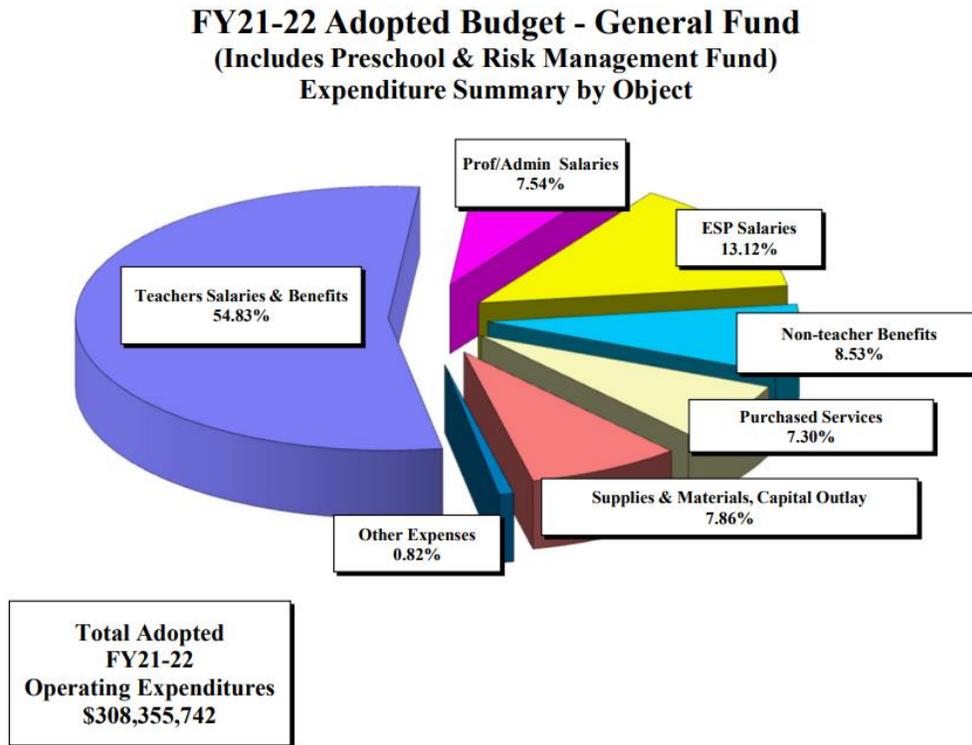
2021-22 Adopted Budget

For the school year ending on June 30, 2022, District 11 personnel presented a proposed budget totaling \$673 million to the Board of Education. This budget was approved on June 9, 2021 (resolution 2021-39).²¹

²⁰ <https://cedar2.cde.state.co.us/documents/DPF2018/1010-3-Year.pdf>. 2019 is the most recent data available.

<https://cedar2.cde.state.co.us/documents/DPF2019/1010-3-Year.pdf>

²¹ <https://www.d11.org/cms/lib/CO02201641/Centricity/Domain/181/2021-2022%20Adopted%20Appropriation%20Resolution.pdf>

Figure 7. General Fund Proposed Approved Budget, 2021-22²²

The 2021-22 budget features several new expenditures, which include substantial raises for all three employee groups, continued reduction in student school-based fees, opening costs of the new SPARK On-line campus, funding for the maintenance for a significant amount of computer devices for students, funding for mandatory contract increases, funding for significant student furniture “refresh” across the District, and increasing financial reserves to allow for greater budget flexibility over the next few years.

Budget Context

The 2021-22 budget was drafted in four to six weeks when the usual timeline is four to six months. This was due to uncertainty at the time around funding as well as the continued stressors created from the pandemic. However, the restoration of K-12 funding to pre-pandemic levels is hoped to enable the District to become more competitive and aid student achievement.²³

Despite the new initiatives and expenditures featured in the 2021-22 budget, D11 has several areas that have continued need and place strain on the budget. These areas include lost learning time from the pandemic, rolling out District Academic Master Plan (AMP), funding District Facilities Master Plan (FMP), filling a significant number of personnel vacancies, compensating closer to the market for all employee groups, rapidly escalating costs in constructions, upgrading facilities and transportation, and declining enrollment.²⁴

Declining enrollment in the District and rising inflation reportedly will have significant impact on the upcoming budget for the 2022-23 school year. It is noted that potentially over 50 staff positions will have to

²² <https://www.d11.org/cms/lib/CO02201641/Centricity/Domain/181/21-22%20Adopted%20Budget.pdf>

²³ id.

²⁴ id.

be cut in the new budget to compensate for the loss of students while maintaining the Board approved teacher-to-student ratio.²⁵ Over the last few years, D11 has faced this similar situation, having to reduce the budget by potentially millions of dollars, as each student departure reflects the loss of thousands of dollars in per-pupil funding.²⁶ Without MLO dollars to support areas such as teacher compensation, reduced class sizes, and capital improvements, cuts to these strained areas would be more acute.

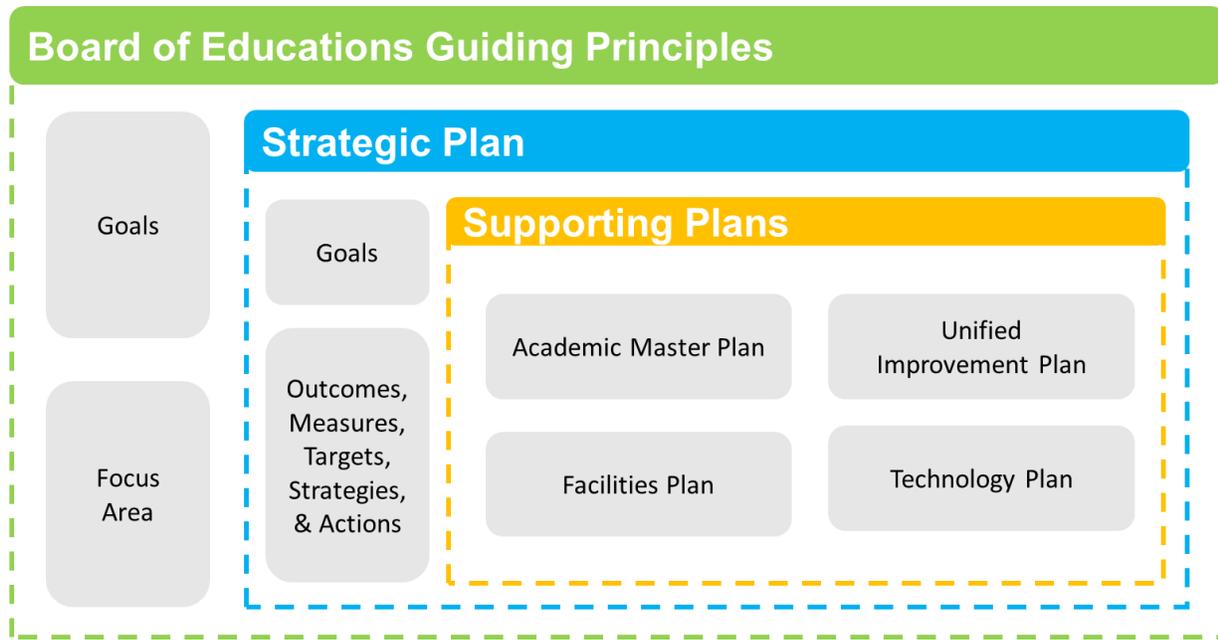
²⁵ <https://krdo.com/news/2022/04/14/district-11-faces-more-than-50-teaching-positions-cut-due-to-decline-in-enrollment/>

²⁶ <https://www.kktv.com/content/news/District-11-aims-to-trim-at-least-10-million-from-next-years-budget-job-cuts-possible-507551231.html>

III. MLO ALIGNMENT TO DISTRICT PLANS AND INITIATIVES

Understanding alignment and coherence between the various D11 documents/initiatives is an opportunity to identify common goals and connections between the MLOs and initiatives or areas of focus within the District. In addition, analyzing alignment ensures a critical lens is focused on maximizing the District’s efforts and financial resources.

The following section includes three parts. First, an overview of the District’s guiding documents including the Strategic Plan, the Academic Master Plan, the Unified Improvement Plan, the Facilities Plan, and the Technology Plan. Second, an alignment table (Figure 8) which represents the alignment of the MLOs and all the guiding documents. This table includes the 2000 and 2017 MLO PIPs. Finally, there is an alignment analysis which includes data from interviews, focus groups, and surveys.



D11 STRATEGIC PLAN

In 2019, under the leadership of the former Superintendent, Dr. Michael Thomas, D11 embarked on a process to develop and implement a new strategic plan for the foreseeable future. At the time, Dr. Thomas articulated a vision for the new plan to move the community to become partners with D11, which models transparency and effective, equitable guidance of public resources. The Strategic Plan, approved by the D11 Board in 2019, was intended to serve as a decision-making framework for District and school leadership.

For a strategic plan to have the desired impact, all District activities need to align. Therefore, as part of this assessment, PCG analyzed the alignment of the MLO PIPs to the Strategic Plan as well as the 'Strategic Plan: Ends Results'²⁷ document, which are planned outcomes for the District to accomplish. During interviews and focus groups, PCG also asked PIP owners, District staff, and Board members to share their

²⁷ District 11 (2019). *Strategic Plan: End Results*. [5-13-19 End Results Final.pdf \(d11.org\)](https://www.d11.org/5-13-19-End-Results-Final.pdf)

perception of how, if at all, the PIPs align to the Strategic Plan, as well as their ability to measure PIPs' outcomes based on the Strategic Plan. Analysis of specific alignment to the Academic Master Plan, Facilities Plan, and the Unified Instructional Plan (UIP) have also been included within this report.

The approved D11 Strategic Plan strategies and end results are listed below:

Strategy	End Results
<p>Strategy One: <i>We will cultivate a collaborative culture that promotes intentional, mission-driven change.</i></p>	<ul style="list-style-type: none"> • Identifies and endorses a set of collaboration tools and practices and provides resources and structures to implement and sustain their use • Establishes and uses a collaborative process for selecting, and vetting change initiatives • Supports and rewards innovation and creativity • Engages in practices that build trust and support effective collaboration. • Seeks diverse perspectives intentionally and the involvement of underrepresented community stakeholders • Uses a collaborative process to create systems, structures, schedules, and environments that facilitate student growth and choice • Monitors and regularly assesses our approach to collaboration and change initiatives • Empowers students with the aptitude, skills, knowledge, and opportunities necessary to create change through collaboration • Celebrates collaborative success
<p>Strategy Two: <i>We will align our actions to our shared understanding of and commitment to the strategic plan.</i></p>	<ul style="list-style-type: none"> • Understands and communicates the strategic plan • Provides wide-reaching, regular messaging that is aligned with and supports the strategic plan • Employees regularly demonstrate and reflect on their individual and collective contributions to the strategic plan • Students, families, and community members understand and contribute to achieving the strategic plan • New and existing endeavors are vetted to ensure alignment with the strategic plan • Supports unique pathways for students and staff to achieve the strategic plan • Streamlined practices, protocols, and procedures help employees achieve the strategic plan • Personnel hiring, training, and evaluation processes are aligned with and support the implementation of the strategic plan • Building and department plans are aligned to the strategic plan • Makes budget and resource allocation decisions that reflect the strategic plan
<p>Strategy Three: <i>We will guarantee an ecosystem of equitable practices to meet the unique needs of all.</i></p>	<ul style="list-style-type: none"> • Community has a shared understanding of equity and equitable practices and implications in, and of, decision-making • Has an articulated policy and procedures that define equity and equitable practices • Utilizes an equity-based resource allocation model that is flexible and ensures all students and staff are supported based on needs • Engages community partners continually to align resources with the needs of our learners

Strategy	End Results
	<ul style="list-style-type: none"> • Has articulated and widely understood student performance standards to which the District is held accountable • Equity Task Forces exist at the District and school levels to provide oversight and support • Has a system of on-going, universal professional development along with personalized learning based on self-identified needs for all • Understand and demonstrate relevant cultural competencies and recognizes and interrupts patterns of institutional bias • Understands and implements culturally responsive instructional practices • Curricular resources are culturally responsive • Provides learning experiences utilizing strength focused, inclusive learning models based on student learning needs • Grading policies and practices honor diversity of learning, multiple measures of success, and various avenues to mastery • Learning goals and assessment practices are clearly understood and communicated with students and families/significant adults • Has a consistent philosophy of student engagement and support that embraces proactive measures and results in equitable responses to student behaviors • Candidates and employees reflect values that align with and commit to the District's Equity Policy and Framework • Recruits, hires, and retains a diverse workforce reflective of our student body and community to include staff members of color, those who speak languages our students speak, and those who are highly qualified in multiple areas • Creates a welcoming environment that encourages participation, mutual understanding and is responsive to and informed by the needs of our families/significant adults • Students and families/significant adults understand all District learning offerings, and opportunities, and can access them

ACADEMIC MASTER PLAN

In 2019-20, after the completion of the Strategic Plan, D11 conducted a Programming Gap Analysis²⁸ of its programs to determine the effectiveness of the instruction. As reported at the April 24, 2021, D11 School Board meeting, their analysis “uncovered discrepancies and inequities from school to school promoting the same program, a lack of fidelity with implementation of programs and an alignment problem for students who wanted to follow a pathway of the program.” D11 decided to pursue the development of the Academic Master Plan that would align with the Strategic Plan and be an integral piece of the Facilities Plan. The Academic Master Plan is still in the development process during the 2021-22 school year. Recent changes include launching Spark Online Academy, K-8 Spanish Dual Language Immersion Program, K-1 @ Rogers Elementary, and Montessori Transportation @ Buena Vista.

The central outcome upon completion of the plan is to provide the following in D11:

- Quality Neighborhood Schools

²⁸ D11 Board Meeting Activity. April 14, 2021. [BOARD Meeting Activity 4 14 21.pdf \(d11.org\)](#)

- Distinctive Magnet Schools and Programming
- Aligned Programming Pathways
- Expanded College and Career Options
- Equitable Access to Instructional Core

FACILITIES PLAN

D11 sought to develop a long-term Facilities Master Plan (FMP) that would align short-term and long-term facility needs with the District's Strategic Plan and its Academic Master Plan. The FMP incorporated stakeholder input, current and projected enrollment, utilization/capacity factors, and facility conditions. Principles behind the plan include:

- **Promotes equity.** All schools will receive priority repairs with options created to provide equitable access to high-quality facilities District-wide
- **Created from data, drives to the vision.** Options are created to meet the needs of each planning area as identified by the data and informed by stakeholders
- **Community engagement materially impacts each step.** Engagements help inform the vision, planning priorities, options developed, and the final recommendations
- **Transparency throughout the process.** The project website provides up-to-date documents from the process with notices of upcoming events
- **All options are created to be “trade-up” scenarios for students.** No option will be considered if it does not improve the learning environment for students

While there are projects focused in each high school area including elementary, middle, and high schools throughout D11, the principles behind the plan will also be part of the alignment analysis. Although the voters did not approve additional bond funding in November 2021 to implement the construction projects outlined in the Facilities Plan, it was still important to review the alignment of the PIPs to the plan to provide additional data.

UNIFIED IMPROVEMENT PLAN

The Colorado Department of Education (CDE) introduced Unified Improvement Planning (UIP) in 2009 to streamline improvement planning components of state and federal accountability requirements. The primary purpose of improvement planning is to align efforts to: *“Ensure all students exit the K-12 education system ready for post-secondary education, and/or to be successful in the workforce, earning a living wage immediately upon graduation.”*²⁹ D11 has UIPs for both the overall District as well as for schools that did not meet the student achievement benchmarks determined by the CDE. In addition, D11 created the ‘One Plan’. This plan aligns with the expectations of the UIP and includes:

- Data Analysis
- Contributing Factors
- Major Improvement Strategies
- Student Focus
- Implementation and Actions

²⁹ Colorado Department of Education. Unified Improvement Planning. <https://www.cde.state.co.us/uiip>

As there are both a District UIP and multiple school level UIPs, PCG reviewed the alignment of the District level documents only.

TECHNOLOGY PLAN

The Technology Plan, which included an in-depth plan, was updated in 2018 but expired in 2020. The goals and objectives of the Technology Plan included:

- **Upgrade Infrastructure:** Including half of the schools and the Data Center.
- **Learning Opportunities.** Expand the learning opportunities to an anytime, anywhere capability by using up-to date District-owned, private and hybrid cloud technology
- **Build Capacity of Instructional Staff and Students in Technology Skills.** This would be done through professional development classes that support responsible innovation in a teaching and learning model.
- **Provide Annual Notice to Parents and Legal Guardians.** The notices would concern the type of data transferred to cloud computing service providers and any security breaches within the District.

Since the Technology Plan expired at the end of the 2020 school year, the District compiled a list of technology equipment that could be purchased year over year with potential funds. The list was updated in July 2021.

GUIDING DOCUMENTS' ALIGNMENT

The 2022 MLO assessment sought to find points of intersection and alignment between the existing MLO PIPs and the D11 Guiding Documents including the Strategic Plan, Academic Master Plan, Facilities Plan, and Unified Improvement Plan. Determining how the major initiatives of D11 align to the PIPs seeks to ensure a strong connection between the PIPs and the District's vision and strategic initiatives, while providing an opportunity to discover where gaps may exist and realignment of the MLO PIPs to the strategic initiatives may be needed.

Figure 8 on the following page illustrates the relationship between the MLO PIPs, the Strategic Plan, the Academic Master Plan, and the Facility Plan. The table lists the PIPs by MLO in the left column and across the top row there are the three components of the Strategic Plan in the first section; the goal areas of the Academic Master Plan in the second section; and the Facility Plan by grade span in the final section in the top row. Checks are present where there is evidence of alignment.

Figure 8. Alignment of PIPs with District’s Guiding Documents (Strategic Plan, Academic Master Plan, Facilities Plan, Technology Plan, and Unified Improvement Plan)

MLO	Strategic Plan			Academic Master Plan					Facilities Plan	Technology Plan	Unified Improvement Plan
PIP	Strategy 1 Collaborative Culture	Strategy 2 Understanding & Commitment to Strategic Plan	Strategy 3 Equitable Practices	Quality Neighborhood Schools	Distinctive Pathways & Programming	Aligned Programming Pathways	Expanded College & Career Options	Equitable Access	ES, MS, HS	1-1 Devices (2021)	District Level
Year 2000 MLO Funding											
1B. Employee Compensation			√	√							
2B. Class Size Reduction			√	√				√			
2C. Middle School Implementation			√	√				√	√		
5. Instructional Supplies and Materials			√					√			
6. Literacy (LRT) (TLC)			√	√	√	√	√	√			√
7B. Teacher Staff Development and Technology Training			√	√				√			√
9B. School Library Services Security Assessment Staff			√	√				√			
11B. Technology Support			√	√				√			
12. ESL, SPED, G&T			√	√				√			

MLO	Strategic Plan			Academic Master Plan					Facilities Plan	Technology Plan	Unified Improvement Plan
PIP	Strategy 1 Collaborative Culture	Strategy 2 Understanding & Commitment to Strategic Plan	Strategy 3 Equitable Practices	Quality Neighborhood Schools	Distinctive Pathways & Programming	Aligned Programming Pathways	Expanded College & Career Options	Equitable Access	ES, MS, HS	1-1 Devices (2021)	District Level
14. Research Based Interventions & Full Day Kindergarten			√	√				√			√
20. Align DALT, (Terra Nova) (MAP) ((GK12)			√	√				√			√
21A. Charter Schools			√	√				√			
21B. Charter Schools – District			√	√				√			
23. Student Achievement Performance Review			√	√	√	√	√	√	√	√	√
24. MLO Contingency Reserve											
Year 2017 MLO Funding											
1. Comprehensive Student Support Model	√	√	√	√	√	√	√	√			√
2. Teacher Attraction & Retention			√	√				√			
3. Education Support Professionals			√	√				√			

MLO	Strategic Plan			Academic Master Plan					Facilities Plan	Technology Plan	Unified Improvement Plan
PIP	Strategy 1 Collaborative Culture	Strategy 2 Understanding & Commitment to Strategic Plan	Strategy 3 Equitable Practices	Quality Neighborhood Schools	Distinctive Pathways & Programming	Aligned Programming Pathways	Expanded College & Career Options	Equitable Access	ES, MS, HS	1-1 Devices (2021)	District Level
Attraction & Retention											
4. School Security Enhancements			√	√							
5. Class Size Reduction			√	√				√			
6. Technology Replacement Cycle			√	√				√		√	
7. Technology Supports Enhancements			√	√				√		√	
8. Capital Renewal & Improvements				√					√		√
9. Charter School Funding			√	√				√			
10. Debt Redemption											
11. Contingency Reserve											

Alignment Analysis

When viewing the Alignment Table, it is rare that a single PIP aligns to all guiding documents within the table. As to be expected, the Academic Master Plan aligns more closely with the student achievement focused PIPs while the Facilities Plan aligns closely with the Capital Improvement PIP. Moreover, without stretching the connection too far, there are some PIPs that do not have a true connection to any of the selected guiding documents, but still support other goals and priorities within D11 such as debt reduction. Unfortunately, for PIP owners, the *Program Implementation Plan Summary* for the MLO contains two alignment areas, one being alignment to the *MLO Ballot Question*. The second is alignment to the *District Business Plan*. The Business Plan was replaced with the Strategic Plan and subsequent documents such as the Academic Master Plan, Facilities Plan, and Technology Plan. It is no longer the driver for setting goals and areas of focus. It also makes it difficult for the PIP owners to make the connection between the former Business Plan and the current Strategic Plan. Without an updated *Program Implementation Plan Summary*, PIP owners are not required to make explicit alignments to either the Strategic Plan, Academic Master Plan, Technology Plan, or the Facilities Plan.

When analyzing the interview data from PIP owners regarding the alignment with the Strategic Plan, Academic Master Plan, and Facilities Plan, at times PIP owners were combining their own department's work with that of the specific purpose of the PIPs when connecting to the guiding documents. While the department and the PIPs are directly connected, in many instances, the PIP is typically a small slice of the department's responsibility. Therefore, some of the suggestions of alignment, were more focused on their department than the guiding documents, especially the Strategic Plan.

Alignment of PIPs with Strategic Plan

PCG conducted the previous MLO assessment in 2019. At that time D11 was finalizing the strategic plan and identifying the three priority strategies. With the plan still in early stages, PCG suggested the use of an "integrated alignment" process to ascertain the connection between the newly developed plan and the MLO PIPs. Within that process, PCG analyzed the impact of the PIPs and the new Strategic Plan on three different target audiences including students, the D11 staff, and parents/community. The areas of focused on the areas of equity, engagement, outcomes, and foundational. For this assessment, PCG reviewed the Strategic Plan with a focus on the "End State" document, which provides detailed information as to the outcomes to be accomplished within each strategy. Moreover, as part of the analysis, PCG asked each PIP owner, District staff, and Board members during interviews and focus groups to share their perception of how, if at all, the PIPs align to the Strategic Plan and their ability to measure its impact. One overarching theme coming out of the interviews and focus groups was the importance of the "Strategic Delimiters" from the Strategic Plan.

There are three Strategic Delimiters that D11 interviewees believed would help to alleviate misalignment. It was stated multiple times that D11 will not allow past practices to create barriers to new and innovative ideas and that the District will not engage in initiatives that are misaligned with the mission. The Strategic Delimiters have provided PIP owners with permission to question alignment and tweak the PIP focus for better alignment. In fact, some participants believe the shifts have already begun. While there is a process or structure to review the PIP to shift its focus and align to initiatives, goals, or areas of focus, it is worth noting that many PIP owners were unclear about their role in the process.

There was some concern expressed that the Strategic Plan and the PIPs may not be as strongly aligned as initially thought. The Strategic Plan is not easily quantifiable; therefore, it is difficult to measure the PIPs' focus against the strategies identified in the Strategic Plan. In addition, some PIPs' key performance indicators are also not that strong and well aligned, some being whether the funds were used to pay for a service or product, rather than a focus on improvement, which also made measurement difficult. That was voiced as an area of concern. Specifically, in 2000, when the first MLO was approved by voters, the District

had approximately 31,000 students, now there are approximately 21,000 students. Recently, over the past four years, D11 has lost 4,000 students, but is still receiving the same funding level from the MLO with far fewer students. The belief was that ensuring PIPs are aligned with important initiatives or goals (i.e., Strategic Plan), and measuring how the PIPs contribute to the progress of those initiatives is important for the community to understand the PIPs' value.

Other statements from focus group participants that demonstrate alignment to the Strategic Plan include:

- *Equitable practices are a huge part of the Strategic Plan and to the focus for many of the PIPs.*
- *Now that D11 is collecting real data with the implementation of Power School,³⁰ the District can analyze real data on various PIP focus areas rather than 'just stories'.*
- *The Strategic Plan mission is 'empower the whole student'. When using the PIP to purchase student material, train teachers, and place instructional staff into classrooms to provide direct support, D11 is focused on empowering the whole student through quality staff, and high-quality materials.*
- *There are key elements that tie directly to the Strategic Plan. The PIP is supporting students entering with lagging skills, providing interventions that is personalized just for that student ensuring equity for all.*
- *Changing the culture—we can do this in a healthy productive way with the support of the PIP.*

Alignment of PIPs with Academic Master Plan

The Academic Master Plan is still in the development stage. Therefore, while many PIP owners were aware of the five focus areas, details around the specific plans and its alignment to the PIPs were not clear to all PIP owners. However, some PIP owners were beginning to focus on the Academic Master Plan and could define areas of alignment.

Other statements from focus group participants that demonstrate alignment to the Academic Master Plan include:

- *As we are reviewing the alignment of our PIP to the Academic Master Plan, we are looking at two things. First, the definition of a quality neighborhood school at how that definition aligns with the PIP. Every parent should expect high quality curricular materials and direct support to their students. The second area will focus on measuring success, and the key performance indicators*
- *For middle schools, there are curriculum and instruction opportunities that has an alignment with the Academic Master Plan and the PIP.*
- *Our team will look at how the PIPs align to quality neighborhood schools. Systems at the District level will have to shift to find better opportunities.*
- *Our team has used the PIP to be part of the early changes such as at Rogers Elementary School. We have partnered with vendors to have access to Spanish language databases and access to book vendors for the library.*
- *Quality neighborhood schools and pathways align to our PIP. There will be more choices available, and all schools have to offer the best core instruction.*
- *Within PowerSchool there is a powerful formative assessment school, that schools can use and format to their approach for short term goals, which will contribute to high quality schools.*
- *Hoonuit, a component of PowerSchool, will be customizable for the magnet school programs. This will allow them to compare results across programs will inform development of programs into schools.*

³⁰ Power School is the Student Information System adopted by D11.

Alignment of PIPs with Facilities Plan

The Facilities Plan was tied to the failed bond article in November 2021. For PIP owners, the situation prompted a lot of unknowns and unanswered questions regarding the future of the Capital Improvements within D11. PIP owners noted that there were some ESSER funds earmarked to focus on key areas of need. However, it was made clear that the PIPs and the ESSER funds will not be sufficient to address the major issues within the aging facilities throughout the District. Due to so many unknowns, here were few PIP owners who could address the alignment of the PIPs with the Facilities Plan; however, the statements below, from focus group participants, were focused on alignment:

- *Without the bond to support the Facilities Plan, there may be a need to consolidate schools. As a PIP owner of staffing, we may need to look at delivering services differently and using FTEs [full-time equivalents] in a more strategic way to ensure equity.*
- *As PIP owners, they are visiting every school (55 total buildings). They recognize that without the PIP in the MLO funds, the high number of repairs needed within the buildings wouldn't be possible.*

Alignment of PIPs with the UIP

D11's Unified Improvement Plan focuses on the following three major strategies to improve student achievement within the District. They include:

- Ambitious Instruction
- Culturally Responsive Practices
- Family Engagement

To support the major strategies, the District has launched a large initiative to utilize local assessments, school climate and culture data, and common interim assessment measures to create an image for each student designed to guide instruction decisions, inform intervention needs, and accurately predict state assessment outcomes. This is in strong alignment with PIP 20. These data sources are used in D11's One Plan, which incorporates real-time data with the major improvement strategies designed for short-term goal setting and follow-on discussions. Power School will be used to support this initiative as a key component of the UIP to improve student outcomes.

Alignment of PIPs with the Technology Plan

The *Potential Year Over Year Use of Potential Funds* document provides a detail account as to the expenditure of funds for technology replacement. It provides a bridge from the 2015-2020 Technology Plan to a new plan that will need to be developed. *The Potential Funds* document aligns directly to PIP 8, Technology Replacement Cycle.

Alignment: Survey Results

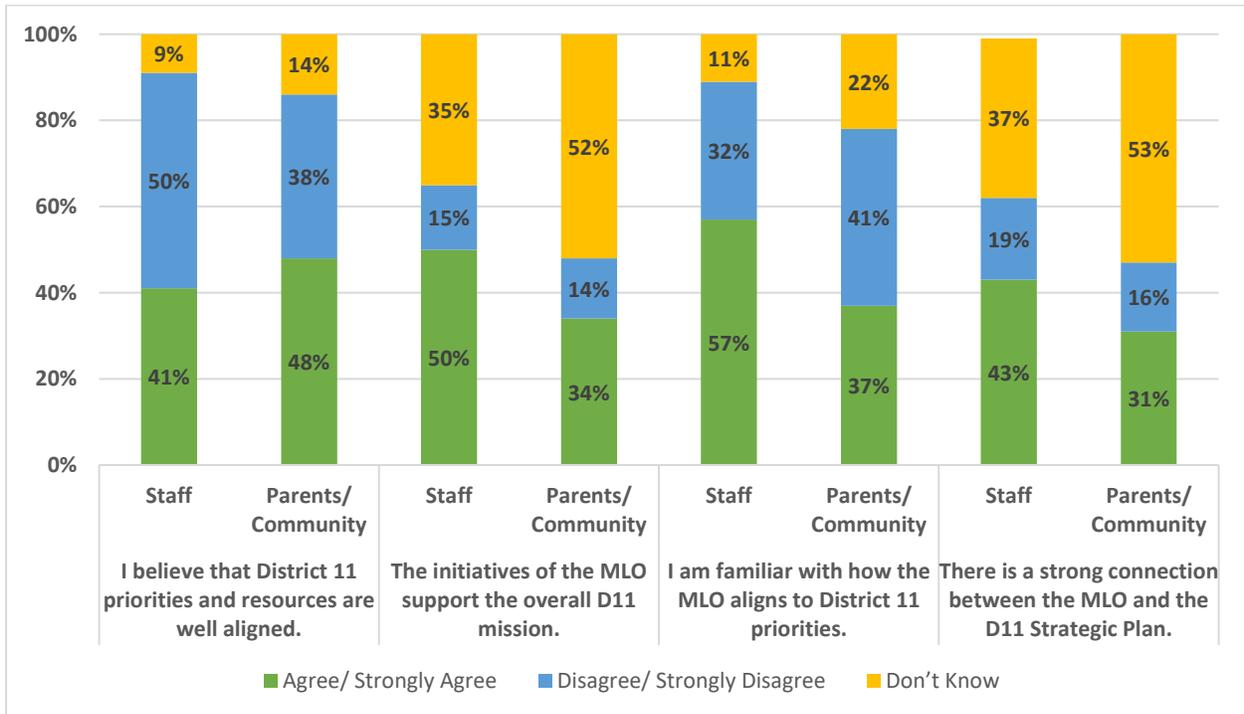
In addition to perspectives collected through interviews and focus groups, staff, parents, and community members were given the opportunity to share their perceptions regarding the connection between District 11 priorities and resources, the MLO and D11 initiatives, and specifically about the D11 Strategic Plan and the D11 Mission.

Stakeholders' evaluation of the alignment between D11 priorities and resources was mixed. Only 41% of staff and 48% of parents and community members agree/strongly agree that the priorities and resources of D11 are well aligned. Half of staff (50%) disagree/strongly disagree with this statement.

Regarding the support of the MLO initiatives for the D11 mission, 50% of staff and 34% of parents and community members agree/strongly agree. The largest proportion of parent and community members responded, "don't know" (52%) to this statement. Responses regarding familiarity with how the MLO aligns with District priorities were similar, more staff (57%) agreed than parents and community (37%). A larger proportion disagreed (32% and 41%, respectively) than responded "don't know" (11% and 22%).

While 43% of staff see a connection between the MLO and the D11 Strategic Plan the second largest proportion of staff responded that they “don’t know” (37%). Among parents and community members, the largest proportion of respondents “don’t know” whether there is a connection, and only 31% agree/strongly agree.

Figure 9. Connection to D11 Priorities and Initiatives, Stakeholder Perceptions, MLO Survey 2022



IV. MLO MANAGEMENT: ACCOUNTABILITY AND TRANSPARENCY

The accountability and reporting mechanisms for the MLO were established with the 2000 MLO and apply to the 2017 MLO as well. There are several components including the MLO Governance/Spending Plan, the Mill Levy Override Oversight Committee (MLOOC), the biennial/triennial performance assessments, and the MLO annual summaries. District staff also play an important role in the management of the MLOs. This section reviews the structures established to manage and document the MLOs and findings related to these functions. We also report findings from our review of documents, interviews and focus groups related to management and documentation, as well as applicable survey results.

MLO GOVERNANCE PLAN

The Mill Levy Override Governance Plan,³¹ provides details on how the MLO funds will be administered and the process for amending the spending plans in order to address changing circumstances or innovations (such as new regulatory requirements or technologies).

The Governance Plan is organized into four sections to describe the accountability components: the overview of the plan, which describes the PIPs for each line item of the spending plan; the District Comprehensive Performance Plan (also referred to as the Business/Strategic Plan), governance and composition of the citizen's oversight committee, and spending plan amendments.

The most recent version of the Governance Plan was approved by the Board in 2017. While the overall governance of the MLOs has not changed since the 2017, the plan references guiding documents that have been updated and replaced. For example, the Governance Plan refers to the District Business Plan which is now known as the Strategic Plan.

The governance structure for the MLO is transparent through the availability of documentation and frequent reporting on management of the MLO funds, but references to prior documents and structures may make it difficult for District and community stakeholders to understand.

Mill Levy Override (MLO) Citizens' Oversight Committee

The Ballot Issues approved by voters in 2000 and 2017 called for the formation of a Citizens' Oversight Committee to monitor implementation performance and use of the new Mill Levy Override (MLO) funding. The Committee meets monthly at the District 11 Administration Building to review and monitor both the 2000 and 2017 MLO monies.

According to the D11 website, Committee Members are asked to perform the following:³²

- Monitor MLO spending plan progress
- Make recommendations regarding any program modifications
- Familiarize themselves with the MLO spending plan and the D11 business plan and mission
- Participate in periodic public briefings to inform the community about implementation progress
- Attend regular meetings, at least six per year

³¹ [Mill Levy Override Governance Plan](#)

³² MLOOC Committee Member Duties are described on the D11 Website: <https://www.d11.org/Page/10952>

MLOOC members are appointed by the Board of Education and the Board may add additional members to the committee at any time.

The configuration of the MLO Oversight Committee has changed over time reflecting changes in other District leadership structures. For example, for several years, the Committee was merged with the Audit Committee. However, after the passage of the 2017 MLO, it again became a separate committee.

MLO Oversight Committee meeting agendas and minutes are posted to the D11 website. During the 2021-22 school year, the Committee met monthly. Over the past two years, the Committee continued to meet through COVID-19 closures, but members noted that attendance had been more variable with the transition to online, and now hybrid meetings. Meeting notes indicate an average of 50% attendance of committee members since the start of the 2021-22 school year.

Meeting topics continued, as in previous years, to focus on monthly financial updates, individual PIPs that are up for review and updates, and presentations from PIP owners. Other agenda items included the Committee Charge (which was read to the committee by the CFO in August 2021), and Committee membership recruitment.

The Committee also checked in monthly on responses submitted through the "Public Feedback Form" which is available on the website (see Exhibit 10 below), to date in January, there had been no submissions. A related topic concerned communication about the MLO and increasing the visibility of the MLO to the general public.

Figure 10. Mill Levy Override Public Feedback Form³³

Colorado Springs School District 11 is proud of its Mill Levy Override (MLO) Program and especially its citizen oversight of the program. District 11 is the only Colorado School District that has all of the following controls:

- Citizens Oversight Committee
- Independent triennial audit
- Separate accounting fund for segregation of assets
- Annual financial audit
- Rigorous governance plan
- Itemized program implementation plans

The District welcomes questions, comments, and concerns about the MLO Program. We believe that honest and open transparency ensures a highly successful program with maximum results.

If you have a question, comment or concern, please fill out the following form and someone will respond to you as soon as possible.

As noted in the discussion at the Committee meeting of the MLOOC Charge (August 2021 notes), some of the materials related to the MLO are out of date. In the case of the Charge and the responsibilities of the committee listed on the website, the information refers to structures that have changed in D11. For example, the Charge read in the August meeting still reference the Audit Advisory Committee which became a subcommittee of the DAC in June 2021. As noted elsewhere in this report, materials also refer to the D11 Business Plan, which was in place before the 2019 Strategic Plan was adopted and is no longer the current guiding document.

³³ <https://www.d11.org/cms/module/selectsurvey/TakeSurvey.aspx?SurveyID=423>

Membership and Recruitment

There are currently 17 committee seats filled, out of a maximum of 23 positions.³⁴ Members have served on the committee for varying lengths of time, with some members serving over 10 years, but many joined after the passage of the 2017 MLO.

MLOOC meeting notes and our focus group conversation reflect a desire to increase interest and membership on the committee. Committee members noted that the original MLOOC had many more applicants than available seats. An application for citizens who wish to join the committee is available on the D11 website, and over the course of the year potential members have attended MLOOC meetings. Suggestions for recruitment have included reaching out to PTAs, other District committees such as the District Accountability Committee (DAC) and the School Accountability Committees (SAC), advertising via media outlets and through school leadership. Committee members noted that their efforts, to date, have not yielded increased interest in membership, which, they attribute, in part, to the continued community focus on the impacts of COVID-19 and related policies.

Roles and Responsibilities

As noted above, the roles and responsibilities of MLOOC members are described in the Governance Plan and on the D11 website. While there is information available about the MLOs and the role MLOOC members, committee members indicated that their effort to onboard new members has been impacted by the switch to online meetings necessitated by COVID-19. Virtual and hybrid meetings, they noted has inhibited some of the more in-depth discussions they conducted during meetings in previous years and the opportunity to pore over information and ask questions. In addition, some members were unsure that their value was understood within the committee, stakeholders and to District staff.

In addition to the fiduciary oversight responsibilities of the MLOOC, committee members described opportunities they have had to represent the MLO to their community through informal interactions. While formal communication about the MLO is the responsibility of D11, committee members noted that their participation has enabled them to engage with the management of MLO funds and being able to inform (and in some cases push back on) community conversations with firsthand knowledge about whether the funds are being used appropriately. Committee members noted that providing additional impact stories to them about the MLO could enhance these community conversations.

Committee members and staff conveyed a desire to see a stronger orientation process put in place to provide new members with more intentional information about the MLO, the committee role in oversight and communication, and the relationship to the Board of Education. With open seats available on the Committee and the natural ebb and flow of appointments, District staff transitions and recent members who are still new to their role, reconsidering and improving this process was a suggested near-term priority.

MLO Assessments: Performance Excellence Assessment Reports

Consistent with both the 2000 and 2017 Election Ballot Questions, D11 has contracted with an external vendor to conduct biennial/triennial assessments of the MLO fund. An independent review, as described in the 2000 ballot question, shall be “conducted every two years thereafter to assess and report to the public about the District's progress in meeting the goals set forth in the performance plan, and to address other priority educational needs.” Following recommendations in the 2016 assessment, D11 shifted from a biennial to a triennial review cycle.

³⁴ MLOOC Meeting notes, August 17, 2021.

<https://www.d11.org/site/handlers/filedownload.ashx?moduleinstanceid=43737&dataid=67649&FileName=Meeting%20Notes%2008.17.2021.pdf>

Since 2000, seven independent reviews have been completed (December 2001, December 2006, March 2009, March 2012, January 2014, September 2016, and July 2019). Copies of all past assessment reports are available on the D11 website. The 2022 assessment by PCG is the eighth independent review.

The focus and timing of the external review has shifted over the past 22 years to reflect changes in D11 organization and guiding documents, as well as interests of the District. The request for proposals (Solicitation #S2022-0010, Fall 2021) for the current assessment provided the following brief history of the review and the proposed framing for 2022:

As required by the Mill Levy Election Ballot question approved on November 7, 2000, the District entered into a contract with KPMG in March 2001 to develop and Academic Performance Plan, now known as the Comprehensive District Performance Plan. Subsequent to the development of the initial Comprehensive District Performance Plan, the District has developed a 7-element Business Plan that acts as the umbrella for the four critical underlying plans: Instructional plan, Financial Plan, Technology Plan and Mill Levy Override Plan. Together these plans constitute the District's Comprehensive Performance Plan. The last review (seventh) used the new Strategic Plan, in lieu of the previous "Comprehensive Performance Plan" to assess the Mill Levy progress and performance.

Program Implementation Plans (PIP)

Each of the items contained in the MLO Spending Plan has a Program Implementation Plan (PIP).³⁵ The PIPs include program description and any plan amendments, the alignment to the ballot questions, an explanation of the use of funds including a breakout of cost areas and full-time equivalent (FTE) personnel according to employee group to be hired or supported.

Each PIP also contains the following statement to remind stakeholders of the intent and extent of MLO support as a *supplement* for District 11 programs: "The District would like to thank the taxpayers for the additional resources to supplement important D11 programs. Please note that these resources supplement existing funds in order to enhance effectiveness."

The table below presents the complete list of the current PIPs, for both the 2000 and 2017 MLO.

Figure 11. Program Implementation Plans for the 2000 and 2017 Mill Levy Overrides

PIP Category	PIP Number
2000	
Compensation	PIP 1B Employee Compensation
Class Size Reduction	PIP 2B Class Size Reduction
	PIP 2C Middle School Implementation
Instructional Staffing Enhancements	PIP 6 Literacy (LRT) (TLC)
	PIP 12 ESL, Special Education, and Gifted and Talented
Instruction	PIP 5 Instructional Supplies and Materials
	PIP 14 Research Based Interventions/Full Day Kindergarten (Suspended 7/1/19)
Technology	PIP 7B Teacher Staff Development and Technology Training
	PIP 9B School Library Services, Security, Assessment Staff
	PIP 11B Technology Support

³⁵ See: [2000 MLO Program Implementation Plans \(PIP\)](#) and [2017 MLO Program Implementation Plans \(PIP\)](#)

PIP Category	PIP Number
2000	
	PIP 20 Align DALT (Terra Nova) (MAP) (GK12)
Other	PIP 21A Charter Schools
	PIP 21B Charter Schools – District
	PIP 23 Student Achievement and Performance Review
	PIP 24 MLO Contingency Reserve
2017	
Safe and Healthy Learning and Working Environment	PIP 1 Comprehensive Student Support Model
Attraction, Recruitment, and Retention of Quality Staff	PIP 2 Teacher Attraction and Retention
	PIP 3 Education Support Prof. Attraction and Retention
Security Enhancements	PIP 4 School Security Enhancements
Class Size Adjustment	PIP 5 Class Size Reduction
School Technology Requirements	PIP 6 Technology Replacement Cycle
	PIP 7 Technology Support Enhancements
Maintain School Buildings	PIP 8 Capital Renewal and Capital Improvements
Charter Schools Equity	PIP 9 Charter Schools Funding
Debt Service Redemption	PIP 10 Debt Redemption
Contingency Reserve	PIP 11 Contingency Reserve

While PIPs have been mostly stable since voters approved the MLOs, as noted above, changes are permitted through the four-step process (the minimum amendment requirements) described in the Governance Plan.

Among recent major changes in the PIPs was the 2019 suspension of PIP 14: Research Based Interventions/Full-day Kindergarten. This suspension was approved when state funding became available to support kindergarten for all Colorado students. D11 staff also described changes to the language of some PIPs to broaden their application to the current context and circumstances of educating D11 students while not changing their intent. Examples include allowing the purchase of digital materials or expanding the eligibility of staff (not only certified teachers) who can receive professional development funded through the MLOs.

Changes also occurred in expenditures with underspending on some PIPs due to COVID-19 disruptions. The MLO plan is specific about the use of MLO funds in those cases, with unspent MLO monies applied to the MLO reserve to pay off District bonds.

MLO Annual Summary

An annual report, “The Mill Levy Override Summary” of PIPs and expenditures is provided to stakeholders as stipulated in the Governance Plan. These summaries are typically published at the end of the calendar year and are available through on the D11 website for review.³⁶ Summary information about the MLOs is also provided as part of the annual District Overview.³⁷

The Summary is prepared by each PIP owner and consolidated and reviewed by the CFO and the MLO Administrator. PIP owners are provided with a template to ensure consistency of reporting. Each PIP is

³⁶ The 2020-2021 Summary Report was published on the D11 website in March 2022.
<https://www.d11.org/site/handlers/filedownload.ashx?moduleinstanceid=461&dataid=73319&FileName=20-21%20MLO%20Annual%20Summary.pdf>

³⁷ See: [D11 District Overview 2021](#)

summarized in a separate section in the report. The report provides the PIP overview (described above), and then the pages that follow describe the goal of the PIP, a summary of key results, and action plan summary. This is followed by a presentation of data supporting activities conducted under the PIP. A summary table that describes the measure, status, goal, essential strategies, comments, target owner, and delivery date follows the presentation of supporting data.

PIP owners develop the Key Performance Indicators (KPIs) for their PIP and provide an annual status rating on a three-point visual scale whether the measure is on an “upward trend (upward pointing arrow),” “even trend” (horizontal arrow), or “downward trend or attention needed” (arrow pointing downward). A final section provides detailed financial information regarding budgeted amounts for PIP expenses against actual allocations.

The annual summary report has been through several iterations. A change was made in the report and PIP presentation in 2018-19 and refined in 2019-20 to its current format. Changes include streamlining the presentation of information and omitting the “alignment with the business plan” section.

Although the report provides information and ratings for each PIP measure, there is some misalignment observed between each goal or set of goals, the KPIs, and the data presented and the rating system. It is not clear what the development process is for each KPI, the review of those KPIs, the ratings and evidence, and general consistency across PIPs. PIPs are presented individually to the MLOOC, and they ask questions about goals, outcomes and expenses. It is not clear where in the process, or how frequently, the components of PIP reporting are evaluated—whether the goals still meet the needs, whether the measures are adequate and whether the rating is appropriate.

This process of development, assessment, validation, and oversight should be described in MLO materials and/or the summary report. A description including definitions of the items in the PIP summary tables could promote greater transparency and could enable MLOOC members and other stakeholders to see the throughline from the intent of the MLO to the annual outcomes. In addition, the rating system measures only whether the goal was met, but not whether there has been impact over time. Providing understanding of the long-term activities and impact of each PIP would also provide helpful information to stakeholders as they evaluate the MLOs.

DISTRICT 11 STAFF

The MLO is overseen by the District's CFO, who acts as the MLO Liaison with support from an Administrative Assistant role that divides time between the CFO and payroll offices. Glenn Gustafson served as the D11 CFO for 21 years (from 2000 to 2021) but has been with D11 since 1992. He returned in January 2022 as Interim CFO to fill the vacancy in the position.

The CFO and administrative assistant fulfill important roles in the management of the MLO including informing District staff (PIP owners) of reporting requirements, organizing the MLOOC and meetings, reporting monthly and annually on MLOOC expenditures, and developing the MLO Summary report. Because of Mr. Gustafson's long tenure in D11, he has also served as the institutional memory for the MLOs and also in the role of orienting new staff to their responsibilities. Although some internal documentation was developed before Mr. Gustafson's departure in 2021, as D11 transitions to a new CFO it will be important to confirm that a well-developed resource exists for new staff describing their technical responsibilities but also covers stewardship and some information about the importance of the MLO. Some transition materials were presented to the former superintendent, but it is not yet known what will be included in a packet for a newly appointed superintendent in 2022.

PIP Owners

Each PIP under the MLOs has a designated “owner” who is responsible for oversight of the implementation and reporting of the use of MLO funds. Among their responsibilities, PIP owners report to the MLOOC at their monthly meeting about work undertaken in their area monitor and provide detail about the expenditures under the PIP using templates developed by the CFO’s office for inclusion in the MLO annual summary report. PIP owners also may propose amendments to their PIP to the MLOOC approval to respond to District needs as they emerge.

While a large proportion of PIP owners have been in D11 for many years and have been “owners” for much of that time, staff transitions, shifting responsibilities, and departmental reorganization have introduced new staff to this role in recent years. Staff who are new to PIP ownership described a variety of onboarding experiences to their role in the MLO; some received limited information and learned their responsibilities “on the job” while others had a more formal orientation. As a result, PIP owners have varying levels of information and understanding about the MLO, MLO processes and reporting cycles, the PIPs themselves, and the role of the MLOOC. PCG also observed a range of perceptions regarding the MLO: some saw it as designated funds, like a grant, while others understand it as a contract with taxpayers with significant responsibility to manage and maintain for stakeholders. Staff overall saw the MLO as a necessary and important supplement to the D11 budget.

Due to their varied experiences staff and PIP owners suggested a more consistent onboarding process including a central, readily available resource they could access to answer their questions and reduce reliance on senior staff and the CFO. Suggested orientation materials included a timeline with reporting dates and requirements as well as other information about the MLOs and PIPs. A portion of this material could be similar to the information provided regarding the annual budget development process.³⁸ Additional information, such as the history and rationale, could constitute a PIP owner’s manual.

Staff found the reporting templates useful but noted that additional touchpoints about the PIPs (over and above the annual compilation of MLO information and possible presentation to the MLOOC) could help generate deeper understanding of the MLO and its impact over time.

PUBLIC ACCOUNTABILITY AND TRANSPARENCY

Communication

The approval of the 2000 and 2017 MLOs reflects a commitment of the D11 community to its schools. Several District staff and community members referred to the MLO as a “compact” between D11 and its citizens. As described above, part of the compact is transparent management of the MLO monies including communication about activities and initiatives it supports.

D11 stakeholders can find out about the MLO in several ways. The District collects most information about the MLO within the administration section of their website. The website provides links to governance documents, information about the MLOOC and agendas and notes from previous MLOOC meetings, MLO external assessments, MLO Annual Summaries, and the Program Implementation Plans for each MLO. Information directly from the Communications Department is another source of information about the MLOs.

Recent and past efforts to share the activities and impact of the MLO outside of the MLO reporting mechanisms include District-wide articles in their e-newsletter, *K-12 Insights*, posters in schools describing MLO-funded projects, and encouraging local media coverage. Relying on multiple outlets ensures that D11

³⁸ See: The Annual Budget Development Process: <https://www.d11.org/Page/336>

news, and news about the MLO reaches all stakeholders who have different preferences for how they receive information.

The staff and parent and community surveys asked how stakeholders learn about the MLO. The largest proportion of staff learn about the MLOs through the D11 website or app (26%), e-mail (24%) and the *D11 Insights* newsletter. The largest proportions of parents and community members learn about it through the same three sources (28% reported that e-mail is the primary source of information).

Figure 12. Primary source of information about activities related to the MLO, MLO Survey 2022

Source	Staff (N= 739)	Parent and Community (N= 681)
News Media (TV, Radio, Newspaper)	13%	9%
Social Media (Twitter, YouTube, Facebook, Instagram)	3%	3%
D11 Website/ D11 App	26%	21%
E-newsletter (<i>D11 Insights</i>)	22%	26%
Email	24%	28%
Other	12%	13%

For staff, “other” included board meetings, conversations with other staff/co-workers, administrators, or individual research, and many indicated that they did not know about the MLO. For parents and community members, “other” included direct information from their school, school board meetings, but the majority of “other” responses indicated that they do not know about the MLO.

According to interviewees and focus group participants, communicating about the MLOs poses some challenges to “making it a story people can relate to.” While taxpayers know that their additional taxes fund D11 activities, conveying how the funds specifically support the school system and the impact they are having has proved more complex, particularly for PIPs that cover only part of an initiative or staffing.

An additional challenge for communicating about the MLO is competing priorities of the Communications Department which is responsible to focus on all District activities, and the staffing level of that department. The Communications Chief oversees a staff of 10, but those staff are focused on technology, with only one staff, the Chief, focused solely on storytelling for D11.

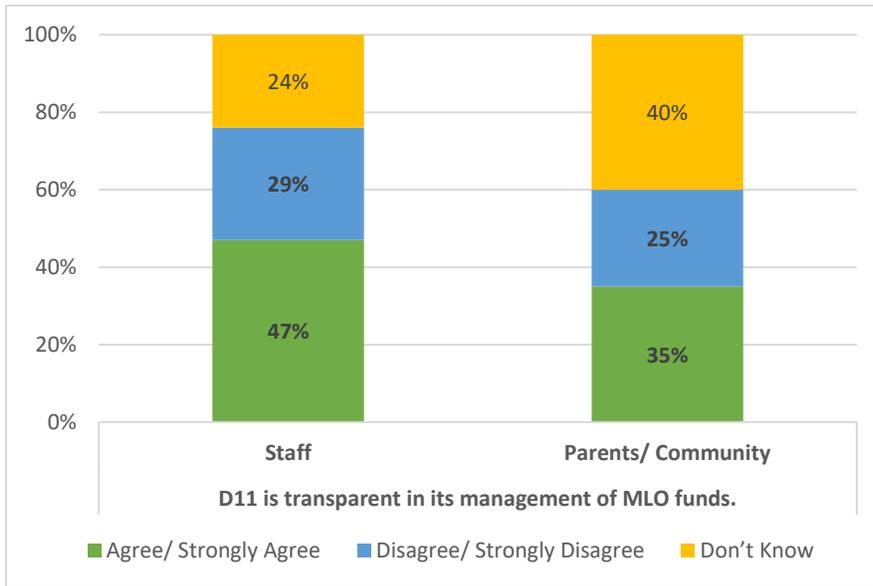
Communications provides an easy to complete template for D11 staff to post stories to share with the larger community. PIP owners and other staff may need explicit encouragement to do so specifically for MLO—funded work. PIP owners may also need encouragement to frame their role as a spokesperson and champion of their PIP and the MLO.

Transparency

Since the passage of the 2000 MLO, D11 has established transparency and accountability structures to monitor and report on MLO funds.

On the staff and parent and community member surveys, respondents were asked about the District’s transparency in its management of MLO funds. Among both stakeholder groups, the largest proportion agree or strongly agree that D11 is transparent in the management of MLO funds. Though among staff one quarter “don’t know” and among parents and community members the proportion that “don’t know” is 40%.

Figure 13. Perceptions of Transparency in Management of MLO funds, MLO Survey 2022



In 2019, a greater proportion of staff agreed/strongly agreed that D11 was transparent in the management of MLO funds (55%) and a smaller proportion responded, “don’t know” (15%). Among parents and community members, fewer reported agree/strongly agree (32%) and disagree/strongly disagree (18%), consistent with current results, the largest proportion of parents and community members responded that they “don’t know” in 2019 (50%).

V. STAKEHOLDER ENGAGEMENT

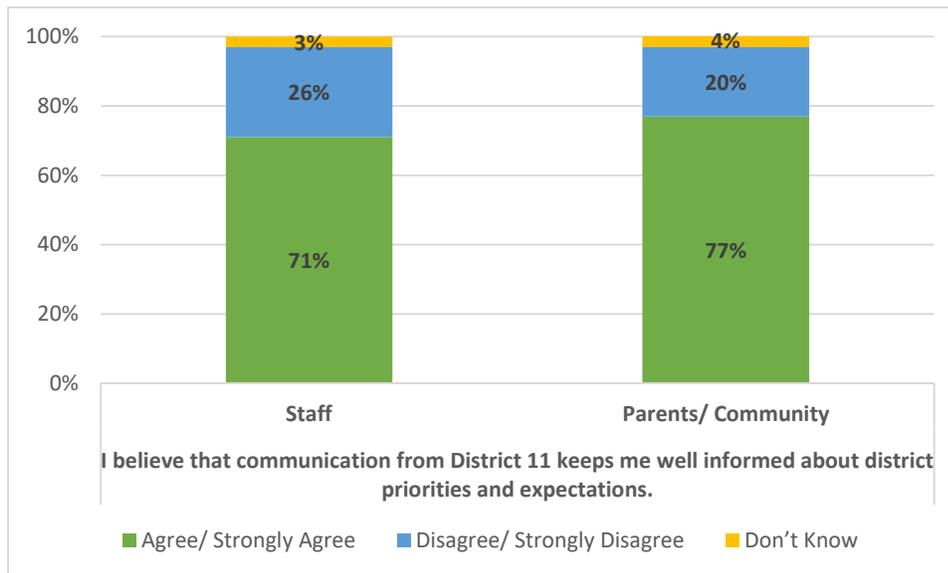
An important component of the MLO theory of action is engaging community stakeholders in understanding the MLOs, the PIPs and their impact. In order to gauge stakeholder’s awareness of the MLO, PCG collected perception data across several key areas: communication about the MLOs, general understanding and awareness of the MLOs, activities conducted with MLO funds, the impact of the MLOs and perceptions about the strengths and areas for improvement in the District.

Overall, the majority of staff and parents and community members report that communication from D11 keeps them informed about priorities and initiatives. Awareness of the MLOs, and more specifically the areas funded by the MLOs is more limited. According to survey responses, staff have higher awareness than parents and community members of the MLO, the related PIPs. Less than half of either group report that the MLO has an impact on District schools. Among both stakeholder groups, the largest proportion see impact in four areas: technology, facilities, students support and teacher compensation. Awareness among both stakeholder groups has not changed much since the 2019 assessment on most measures.

COMMUNICATION ABOUT D11

Regarding communication from D11 about D11 initiatives, the majority of staff and parents and community members feel D11 keeps them informed about District priorities and expectations (71% and 77%, respectively).

Figure 14. Communication about D11 priorities and expectations, MLO Survey 2022



STAFF UNDERSTANDING OF MLOS AND PIPS

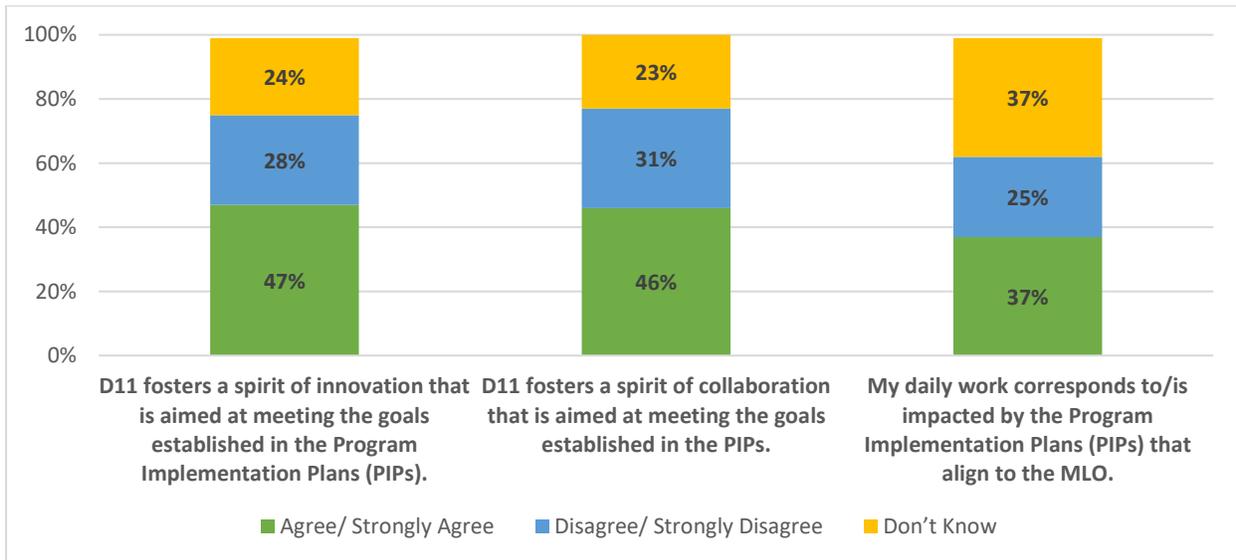
As part of the 2022 assessment (and previous assessments), PCG examined stakeholder perceptions related to the intent of the MLOs and District 11’s capacity to meet the goals of the MLOs. As a measure of perceptions of District capacity, staff were asked questions about innovation and collaboration, two important aspects of D11’s Strategic Plan (and its predecessor, the Business Plan).

In 2022, less than half of staff survey respondents (47%) agree/strongly agree that D11 fosters a spirit of innovation that is aimed at meeting the goals established in the PIPs. Similarly, less than half (46%)

agree/strongly agree that D11 fosters the spirit of collaboration aimed at meeting those goals. Nearly one quarter report that they “don’t know” for each question. These figures are very similar to results on the 2019 staff survey.

Staff were also asked about the relationship between their daily work and the Program Implementation Plans (PIPs). While 37% agree/strongly agree that their work is impacted by the MLO, the same proportion reported that they “don’t know,” and one quarter (25%) indicated that they disagree. Note that the largest proportion of staff survey respondents are teachers, and many aspects of their day-to-day work are affected by MLO investments, such as teacher pay, class size, facilities, and technology. Many other D11 staff roles are touched by MLO monies as well. While it is possible that survey response indicates the view that the impact of the MLO is limited, but it may also indicate a lack of specific awareness (see next section).

Figure 15. Understanding of the MLOs and PIPs, MLO Staff Survey 2022

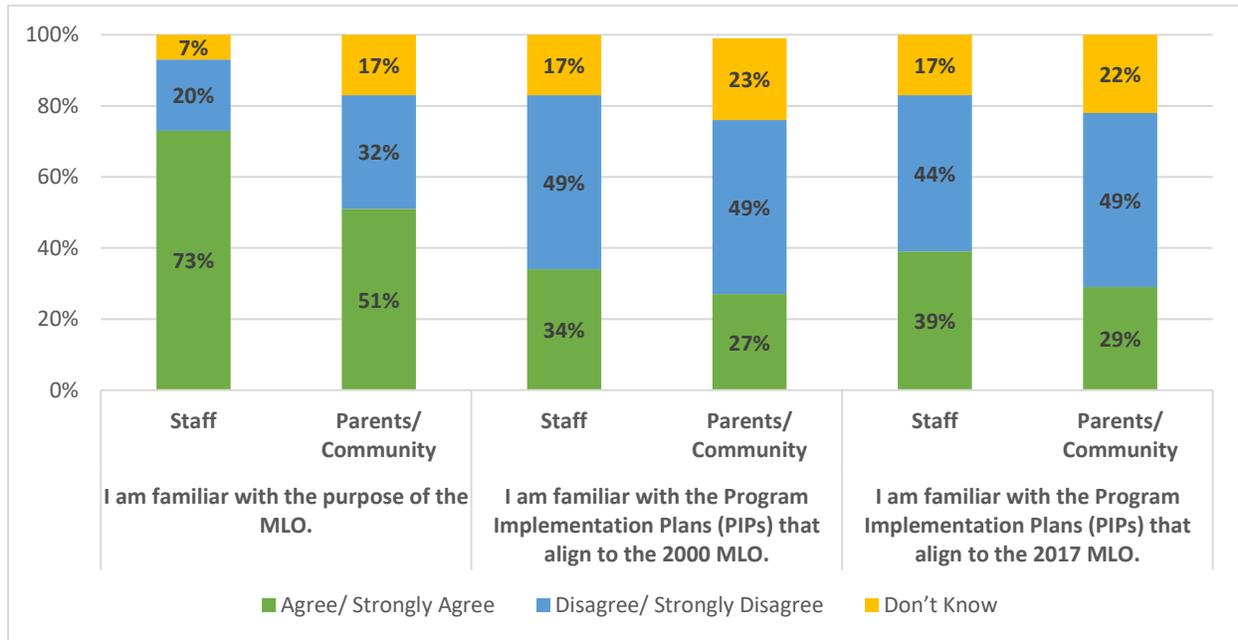


STAKEHOLDER FAMILIARITY WITH THE MLO AND PIPs

Stakeholders were asked about their familiarity with the purpose of the MLOs and the PIPs aligned to the 2000 and 2017 MLOs.

Overall, the majority of staff (73%) and half (51%) of parents and community members agree/strongly agree that they are familiar with the purpose of the MLOs. While staff have a stronger familiarity with the MLO, only one-third are familiar with the program implementation plans of the 2000 MLO (34%) or the 2017 MLO (39%). Among parent and community members, familiarity with the PIPs across the two MLOs was similar (27% and 29% respectively).

Figure 16. Familiarity with the MLO and PIPs, MLO Survey 2022



Staff responses in 2019 were similar: 30% of staff were familiar with the 2000 PIPs and a larger proportion (44%) were familiar with the 2017 PIPs.³⁹ The greater familiarity with the 2017 PIPs is likely due to the recency of approval of the second MLO.

STUDENT FEEDBACK

PCG conducted two student focus groups—one for high school students and one for middle school students—to learn more about student perspectives on attending school in District 11 and points of intersection with their experiences and things that are supported through the MLOs.

High School

High school students participating in the focus group greatly value the diverse and interesting courses offered in their schools and expressed a desire to see a more refined curriculum that is less repetitive from grade to grade. They saw their teachers as involved and engaging; however, students would like to see an increased recruitment of teachers who are more inviting and collaborative with students as well as more diverse. High school students reported that their class sizes were mostly adequate, though they also noted that there are at times some large classes and that their ideal size would be between 15 to 20 students.

Students reported that technology use in instruction varied from teacher to teacher, whether for assignments, exams, or grades. Students reported Wi-Fi that is unreliable in certain areas of the school. There is a desire to have the schools be colorful and decorated with art as well as an increase in the number of janitors to maintain the facilities. It was also noted that some buildings are not fully accessible to disabled students, particularly for those who rely on wheelchair ramps and elevators. Mental health and related services are perceived to be accessible and discussed (via posters, teachers reaching out, etc.).

³⁹ Parent and community members were not asked these questions in 2019.

Middle School

Similar to their high school counterparts, Middle School students who participated in the Focus Group emphasized their gratefulness for diverse course offerings and supportive teachers. They saw their schools as being clean, in okay to top-notch condition, and well maintained. At the same time, they expressed concern over the few janitorial staff and their workload. Students noted that most of their classes ranged from 25 to 40 students, with one science class being approximately 50. Students noted staffing shortages and challenges securing substitute teachers which they saw as causing classes to be larger than normal. The use of technology again varies from teacher to teacher and subject to subject, though most exams are taken online.

While some students viewed online examinations as less reliable (potential systems overloads, etc.), students greatly valued the time spent discussing and reflecting upon their scores. The students had mixed views on the use of their individual Chrome Books (which were given out to students during COVID-19) to complete work. While some students liked the reliance on technology, others expressed a preference to do hands-on work. The School Resource Officers and Security Guards are seen as nice and approachable, keeping the school safe, and politely engaging with students. Counselors and mental health services are readily available for students to sign up for sessions with a tab on their Chrome Books. Students felt seen and known by their assigned counselor; however, they noted that some teachers were less flexible with students accessing those counselors. Lessons from the D11-recommended Second Step curriculum focused on socio-emotional learning were viewed as helpful.

POINTS OF PRIDE

Staff and parents and community members who participated in the surveys⁴⁰ offered many positive comments regarding what is going well in D11 and its schools. Positive responses to the prompt: "Please tell us what you believe your school(s)/D11 does exceptionally well" clustered around several themes:

- *Teachers and staff* – Both stakeholder groups identified committed teachers and staff who care about students and support students' growth and achievement. The noted teachers who are inclusive, engage their students and teach to the whole child. For example, a parent noted, "I admire the dedication of teachers and their support of students on an individual basis." Respondents also noted staff who are very supportive of each other and work as a team.
- *Support for all Students* – A large proportion of responses focused on the supports D11 provides for all students. Stakeholders indicated that D11 does a good job meeting students where they are and provides the necessary supports. For example, one teacher described their school's attention to students' needs and improving their practices, "I believe we, as a school, address the unique needs of our students including the academic, behavioral and social components of school. We are always looking to increase the impact of the programs in place and also look for additional programs and trainings that will enhance the effectiveness of our teachers and school." A parent echoed this comment, "Our teachers and staff do an AMAZING job of supporting all students... Our individualized approach to learning makes it possible to reach kids on the full spectrum of learning...Students who would otherwise fall through the cracks are being inspired every day by a loving and passionate staff. Students who excel are also given opportunities to thrive."
- *Programs and Overall Education*- Stakeholders from both groups highlighted opportunities and choices available to students in D11: academic programs focused on core subjects, arts and music,

⁴⁰ 576 staff and 570 parents and community members offered positive comments about D11.

challenging curricula (e.g., International Baccalaureate (IB)) gifted and talented programs, themed/specialized schools and programs, and afterschool program options.

- *Communication* - Parents and community members indicated that communication from D11 and from individual schools was helpful and informative and made strong connections to the community. Parents and community respondents highlighted school activities and opportunities and offered positive comments about school safety. Fewer staff commended communication but noted strengths in communication between schools and parents and from individual school administrations and from the District.
- *Safe and Welcoming Environment* – Staff noted connections with community, providing a safe and fun learning environment, noted building safety more generally. They also noted support for families. As one staff member summarized, “We are a safe protective, comforting environment for the students. The teachers go out of their way to make sure students are getting what they need academically and emotionally.” Parents also noted supportive school culture, for example one parent stated, “The school functions as an arm of the community that strives to work together to fill gaps when needed.”

AREAS FOR IMPROVEMENT

In both the staff and parent and community surveys, respondents were asked to identify the areas that they felt were important to strengthen D11.

Overall, staff and parents and community are aligned in their highest priority areas for strengthening D11. Staff identified teacher compensation (85%), and teacher recruitment and retention (85%) as the highest priority areas and then class size (78%), education support professionals (78%), and student achievement (78%), followed by student support (75%).

Parents and community identified the same top two areas as “very important” to strengthen D11: teacher compensation (82%) and teacher recruitment and retention (81%). Followed by student support (76%), class size (72%), student achievement (71%). Parents and community members also ranked support for special student populations (71%) as a highest priority area.

The top areas identified by stakeholders receive support through the PIPs of the 2000, and particularly the 2017 MLO precisely because they have been long-term, pressing concerns in D11. While the MLO cannot completely mitigate challenges in these areas, it may be important to remind stakeholders of the connection between the MLO funds and the areas of greatest concern.

Figure 17. Areas Identified as “Very Important” to Strengthen D11, MLO Survey 2022

Area	Staff	Parents and Community
Teacher Compensation	85%	82%
Teacher Recruitment and Retention	85%	81%
Class Size	78%	72%
Education Support Professionals Recruitment and Retention (clerical, crafts, food service, service maintenance, bus drivers)	78%	65%
Student Achievement	78%	71%
Student Support (School counselors, Social/emotional programs, behavioral supports, health needs)	75%	76%

Area	Staff	Parents and Community
Support for Special Student Populations (gifted and talented, special education, English language learners)	66%	71%
School Security	66%	65%
Building Improvements	59%	55%
Instructional Materials and Supplies	57%	65%
Teacher and Staff Professional Development	48%	60%
Literacy Support (Teaching and Learning Coaches)	47%	67%
Technology Enhancements	45%	52%
Debt Redemption	21%	19%
Contingency Reserve	19%	20%
Assessment Systems (student testing)	18%	22%
Charter Schools	8%	16%

Note: Only ratings of “very important” are included in the table. Those 70% or above are highlighted.

Staff and community members also had the opportunity to share areas for improvement in an open-ended question on the survey. Their comments amplified many of the topics that were ranked as “very important to strengthen the District on the survey. Specifically:

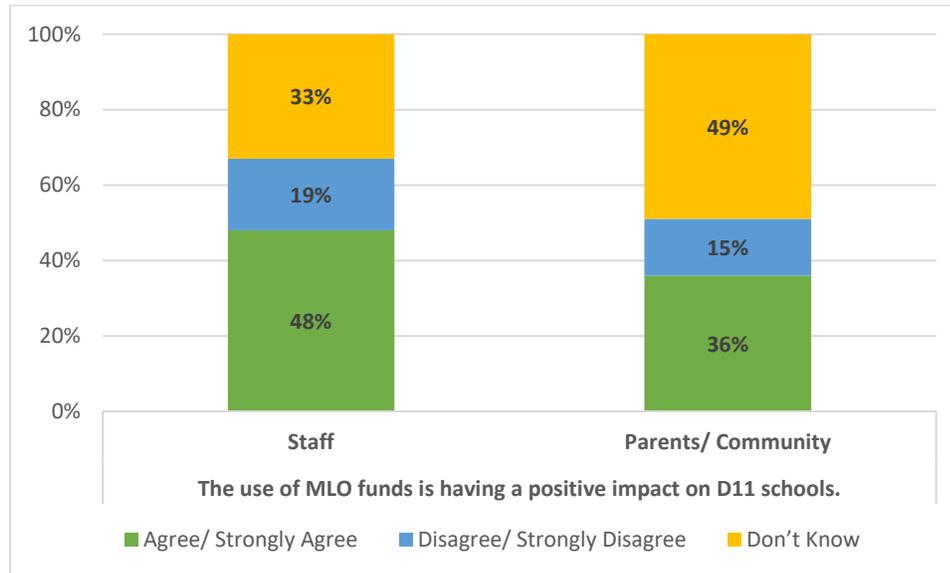
- *Teacher Compensation, Recruitment and Retention:* Staff and community members were concerned that compensation in D11 was inadequate for teachers and other staff (particularly staff serving as education support professionals). All acknowledged the important role of student-facing staff and noted that recruitment and retention of high-quality staff should remain a priority. Staff noted delays in human resource processes. Stakeholders were also concerned about equitable staffing allocations across schools.
- *Class Size:* A large proportion of staff and parents were concerned about increased class sizes and indicated that a reduction of class size would support greater focus on individual students and less teacher stress.
- *Buildings and facilities* – Staff and community members were concerned about aging infrastructure and school facilities. Specific concerns included poorly functioning heat and cooling systems in many classrooms and schools.
- *Student Discipline and Attendance* – Stakeholder expressed significant concern about expectations for students and staff regarding what is appropriate and not appropriate behavior. Staff were concerned about follow through on discipline referrals. Staff were also concerned about attendance and accountability.
- *Leadership:* Staff and community members noted a disconnect between the administration and board and needs and needs in schools. They were also concerned about the ratio of administrators and the tensions on the current board of education.
- *Academic Program and Student Achievement:* Staff and community members were concerned about low achievement in the District and providing a rigorous engaging academic program to all students.
- *Fiscal transparency:* Community members and to a lesser degree staff requested greater transparency in the use of funds and reallocation of funds to support compensation.

IMPACT OF MLO FUNDS

When each MLO was approved by voters in 2000 and 2017, the community enabled District 11 to invest in ongoing and new areas of need. Stakeholders were asked about the impact of MLO funds on D11 and its

schools. While nearly half of staff (48%) agree/strongly agree that the MLO funds are having a positive impact, 19% disagree/strongly disagree and a large proportion of staff are not aware of any impact: 33% responded “don’t know.” Among parents and community members, 36% agree/strongly agree, while 49% report they “don’t know” and another 15% disagree/strongly disagree.

Figure 18. Perception of positive impact of MLO funds on D11/schools, MLO Survey 2022



The responses among parents and community members are very similar to those in 2019. On the 2019 survey, 39% agree/strongly agree that MLO funds are having a positive impact and 48% responded “don’t know.”⁴¹

Stakeholders who indicated they felt the MLO was having a positive impact were asked to indicate the specific areas of impact. Among staff, the largest perceived areas of impact of the MLO were technology enhancements (50%), building improvements (50%), teacher compensation (37%), student support (37%), class size (34%) and instructional materials (29%).

Among parents and community members, the top four areas of perceived impact of the MLO were aligned with those perceived by staff: technology enhancements (58%), building improvements (48%), student support (42%), and teacher compensation (41%). School security (29%), and literacy support (27%) were the fifth and sixth largest areas.

It is striking to note that while responses to this question in 2019 yielded the same prioritization, a much larger proportion of respondents identified teacher compensation as an area of impact (68% of staff and 50% of parents and community). Another difference is seen in the proportion who ranked technology enhancements as an area of impact, in 2019, the proportions were significantly lower: 35% of staff, and 39% of parents and community.

⁴¹ Staff were not asked this question in 2019.

Figure 19. Areas of impact of the MLOs, MLO Survey 2022⁴²

Area	Staff	Parents/ Community
Technology Enhancements	50%	58%
Building Improvements	50%	48%
Student Support (School counselors, Social/emotional programs, behavioral supports, health needs)	37%	42%
Teacher Compensation	37%	41%
Class Size	34%	25%
Instructional Materials and Supplies	29%	25%
Literacy Support (Teaching and Learning Coaches)	27%	27%
School Security	24%	29%
Education Support Professionals Recruitment and Retention (clerical, crafts, food service, service maintenance, bus drivers)	26%	19%
Teacher and Staff Professional Development	26%	23%
Teacher Recruitment and Retention	25%	17%
Support for Special Student Populations (gifted and talented, special education, English language learners)	25%	23%
Student Achievement	20%	17%
Charter Schools	10%	6%
Assessment Systems (student testing)	12%	12%
Debt Redemption	10%	11%
Contingency Reserve	11%	10%
Other:	3%	4%

Note: Six highest rated areas are highlighted for each stakeholder group.

⁴²Only respondents who answered agree/strongly agree were asked to indicate what areas are impacted by the MLO. Respondents were asked to select "all that apply".

VI. RECOMMENDATIONS

In summary, with the finalization of this assessment, D11 has reviewed and evaluated the impact of MLO funds eight times since the initial passage of the 2000 ballot measure. Over this passage of time, the District has changed, as have funding priorities, the needs of students and families, and the institutional understanding of the MLO. The recommendations, while slightly different in each report, have generally centered on the same categories – communication, measurement, and alignment to other District documents and initiatives. This is likely because external evaluators over time have identified similar themes with each subsequent review. These themes translate into gaps in realizing D11's theory of action. Without fully aligning MLO dollars to the District's Strategic Plan and key initiatives and enacting all elements of the Governance Plan with fidelity, D11 may continue to see challenges with reaching its end goal – providing a high-quality, competitive education for its students.

In the following section, we have included an Implementation Evaluation Scale (Figure 20), which indicates the degree to which D11 is implementing the recommendations made in the 2016 and the 2019 Mill Levy Override (MLO) assessments. Implementation of the recommendations are likely to lead to stronger practices ensuring the MLO funds are allocated and used as intended by the voters.

Figure 20. Implementation Evaluation Scale⁴³

No progress. Not being implemented at this time. No students or families benefit from this practice or activity.

Beginning. Just beginning to discuss this practice, strategy, or activity. There is a definite interest and organizational activities have begun. Few students or families are involved or benefit.

Intermittent or Inconsistent. This practice, strategy, or activity is in the earliest implementation stages; progress is being made and plans are moving forward. The practice, strategy, or activity may be implemented in some classrooms or schools but not frequently or with consistency. Some students and families are involved or benefit.

Emerging. Concerted efforts are being made to fully implement this practice, strategy, or activity. Many students and families benefit or participate.

Consistent. Implementation is District-wide and available. This practice, strategy, or activity is consistently implemented. Most or all students and families benefit or participate.

Consistent and Data Driven. Data from this practice, strategy, or activity is used to make decisions about needed services, changes in programs, plans and strategies, and is utilized in the District's emerging, short-term and long-range planning efforts, changes to board policy, procedures, practices, or professional learning opportunities.

2019 MLO ASSESSMENT RECOMMENDATIONS

The recommendations from the 2019 MLO assessment are summarized below. Below each recommendation, PCG has described implementation efforts to-date. See Section VII: Appendix for the complete narrative description of the 2019 recommendations.

1. **Enhance MLO Communication Strategy.** In order to make MLO information easier to access and help stakeholders understand the impact of the MLO dollars, PCG recommended a series of actions that included updates to the D11 website, development of printed materials, a social media strategy, revised PIP language, embedding MLO communication strategy into D11 rebranding, and setting goals to increase awareness of the MLO among stakeholder groups.

⁴³ Adapted from 2015 Wisconsin Transition Improvement Plan (WiTIP)
https://www.witip.org/documents/TIP_ImplementationAndEvaluationRatings_24Nov2015.pdf

As described below in our current assessment recommendations, there is opportunity for D11 to increase stakeholders understanding of the impact of MLO dollars through a multi-layered communications strategy that is focused on storytelling. Most PIP owners described their current communication practices as limited. They recognized that there is work to be done in this area. They also agreed that communicating with stakeholders (especially voters) about the impact that MLO dollars have is a key strategy. Most PIP owners relied on the Communications Department to lead the effort but agreed they could put additional effort into meeting the recommendation.

Implementation Level: Beginning

2. **Establish a Data Dashboard with Key Performance Indicators (KPIs).** PCG recommended that the MLOOC, with input from the board, community, and District staff, develop a system for identifying and reporting KPIs for the PIPs to track progress over time.

Since the 2019 assessment, a streamlined template for collecting data and KPIs has been developed. The template is distributed to the PIP owners annually in the fall. PIP owners are asked to identify appropriate KPIs that reflect their PIP area and report on progress. The annual rating PIP owners provide is on a three-point scale to reflect whether the measure is on an upward trend, an even trend, or a downward trend (needs attention). The data collected is then reported to the MLOOC and included in the MLO Annual Summary Report.

Although the MLOOC has the opportunity to ask questions, there is not currently a rigorous process for reviewing the KPIs for fit (does this measure reflect impact of the MLO dollars appropriately?) or validating the annual rating of the trend assessment (upward, even, downward).

Implementation Level: Inconsistent

3. **Embed MLO initiatives in the Strategic Plan.** PCG recommended shifting focus of how the MLOs support and align to the goals in the Strategic Plan. Additionally, PCG recommended implementing MLO initiatives through an equity lens.

PCG's alignment analysis between the Strategic Plan and the MLO PIPs confirmed there are several PIPs that are more strongly aligned than others. Some PIP owners stated that the Strategic Plan and their PIPs may not be directly aligned, but since the Strategic Plan was focused on more high-level strategies there could be an argument made that there was an alignment to the overall intention of the plan. PCG notes that since the Strategic Plan is not easily quantifiable, it is difficult to measure the alignment of the PIPs to the strategies identified in the Strategic Plan. Due to the revisiting of D11's equity plan, it was determined that the alignment would be difficult to track at this time.

Implementation Level: Beginning

RECOMMENDATIONS FROM THE CURRENT (2022) ASSESSMENT

Based on our analysis of the data collected for this assessment, we offer the following recommendations to build on the successes achieved to date and to continue to meet the goals of the MLO in the future.

MLO Management: Accountability and Transparency

MLO Governance Plan

1. **Update the 2017 MLO Governance Plan**, specifically MLOOC responsibilities descriptions on the D11 website, the MLO Annual Summary Report, and PIPs, to reflect the most current guiding documents for the District (e.g., the District Business Plan is now known as the Strategic Plan).
2. **Develop MLO materials and onboarding program.**
 - a. The primary users of the onboarding would be:
 - i. New MLOOC members
 - ii. District leadership
 - iii. Staff who play a role in supporting MLO work (CFO, Administrative/Support staff, PIP owners, Communications, etc.)
 - b. The program should include materials that cover the following:
 - i. 2000 and 2017 MLOs
 - ii. MLO governance, including MLOOC responsibilities
 - iii. District staffing structure
 - iv. PIP Owners' Manual – Overview of PIPs and PIP owner responsibilities, including reporting templates, timelines, and expectations
 - v. Communications Template – Template for PIP owners and D11 staff to complete that captures stories demonstrating the impact of MLO funds. Template could also be included in PIP owner annual reporting materials. Stories captured could be shared with community.
3. **Identify process for leadership and staff transitions.** To help ensure knowledge transfer and sustain the work of MLO governance and awareness, plans should be made for new District leaders and staff to go through MLO onboarding.
4. **Convene PIP Owners Twice Annually.** PIP owners should convene twice per year.
 - a. The first meeting should occur at the beginning of the school year with the CFO and other relevant staff supporting MLO work to review responsibilities and reporting. This meeting is an opportunity for PIP owners to get clarity on reporting expectations and deadlines and review prior year data reported.
 - b. The second meeting should occur during budget season. This meeting should serve as a formal presentation by PIP owners to the MLOOC of the data reported for the MLO Annual Summary Report. PIP owners should present the Key Performance Indicators (KPIs) that demonstrate the impact of MLO dollars and show data trends over time. This meeting is an opportunity for MLOOC members to ask PIP owners questions that will help the MLOOC gain a deeper understanding of the use of MLO funds, the impact of those funds, ideas for communicating that impact to the community, and any changes that should be recommended to the school board. This convening of the MLOOC and PIP owners is also an opportunity to be thoughtful about the KPIs being used and whether they are appropriate measures for demonstrating impact.

District 11 Staff

- 5. Determine appropriate District staffing structure for MLO oversight and communication.** Based on the needs for financial oversight, reporting, MLOOC coordination, and communication with the board and the public, D11 should determine which District positions (existing or new) should have part of their time allocated to MLO coordination and management. The District may consider a coordinator role who has part of their time dedicated to MLO work. This position could take ownership and become the MLO spokesperson for the District, taking the lead on PIP owner convenings, MLOOC meetings, annual MLO Summary Report, communications, and overall MLO strategic leadership. The coordinator could report to the CFO for MLO work and use the support of the part-time CFO Administrative Assistant.

Public Accountability and Transparency

- 6. Update the D11 website,** including MLOOC responsibilities description, to reflect the most current guiding documents for the District (e.g., the District Business Plan is now known as the Strategic Plan).

Stakeholder Engagement

Communication about D11, Staff Understanding of the MLOs and PIPs, Stakeholder Familiarity with the MLOs and PIPs

- 7. Share stories about the impact of MLO funds.** The MLOOC should work with District communications staff to develop a storytelling campaign that highlights the impact of MLO funds across the District. The PIPs may be used as a guide for different areas to highlight. Examples of stories include showcasing the 1-1 device program, educator retention and competitive salaries, more resources for student health and wellbeing, etc. This type of communications campaign would help position the District to demonstrate stewardship of the community's tax dollars serving their intended purpose. These stories would also help the community gain a deeper understanding of the MLOs and how they benefit D11.

Impact of MLO Funds

- 8. Revisit the guidance and development process for the KPIs for each PIP.** Each PIP owner sets KPIs for their PIP but the KPIs are uneven, and data and targets are sometimes misaligned. Provide oversight or training to ensure understanding of KPIs and how measurement over time can drive improvement. In addition to KPIs, the annual MLO Summary Report should include financial data show what percent of the District's budget for each initiative/office comes from MLO funds. This would help demonstrate the importance of MLO funds in supporting District operations across a wide range of areas.
- 9. Track progress on MLO assessment recommendations.** The MLOOC should determine a system for addressing the recommendations in the MLO assessment report and tracking progress towards those recommendations over time. The MLOOC should take ownership of the accountability for implementation of the recommendations. An action plan that identifies specific goals, action steps, persons responsible, timelines, and metrics may be a useful tool for mapping out the work that needs to happen to address the recommendations. The action plan and associated dashboards tracking progress towards goals should be included in the annual MLO Summary Report in order to provide transparency and accountability to the public on an annual basis.

VII. APPENDIX

ASSESSMENT TEAM

Jennifer Meller, Ed.D. is an Associate Manager in Public Consulting Group and based in Colorado. Dr. Meller has led the project team for the Mill Levy Override assessments in D11 in 2016, 2019, and 2022. She has over 20 years of experience in project management, training, and educational policy. In her current work at PCG, she leads district-level school projects for special education data management and consulting management practices to engage educators and communities to strengthen their student outcomes. Prior to joining PCG, she was the Director of Operations in the School District of Philadelphia's Office of Specialized Instructional Services, where she focused on building programs that supported student's social and emotional growth, implemented student-focused data management systems, supervised federal and state reporting, and oversaw several multi-million-dollar federal grants. She also served on multiple district-wide leadership committees including the Grant and Research Committee, Evaluation and Assessment Committee, Imagine 2014 Five Year Strategic Planning Committee, and the Weighted Student Funding Committee. Dr. Meller earned her MS.Ed. in Higher Education Management and her Ed.D. in Educational and Organizational Leadership, both from the University of Pennsylvania. She also has a B.A. in English from Dickinson College. Dr. Meller's blend of project management skills, knowledge of best public educational practices, communications strategies, extensive training background, and excellent client support allows her to successfully manage a wide variety of complex projects. She brings knowledge of Colorado's education legislative initiatives and an understanding of the educational landscape across the nation to this work.

Meredith Crouse works with state labor and education agencies, school districts, workforce development boards, as well as secondary and postsecondary institutions nationwide on engagements related to strategic planning, monitoring, business processes, program design and implementation, employer engagement, apprenticeship expansion, and college and career pathway initiatives. Prior to joining PCG, Meredith worked for Boston's Workforce Development Board, managing work-based learning programs with Boston Public Schools and employers. She also led the Boston Healthcare Careers Consortium, a sector convening of business, education, and the workforce system that has been recognized by the U.S. Department of Labor as a national model for leadership in industry collaboration. Meredith has direct-service experience providing job-readiness coaching to youth and adults, as well as supporting community college training programs with curriculum alignment to industry needs and connecting graduates to employment. She also has experience in higher education institutional research. Meredith holds a Bachelor of Science degree from Virginia Tech and a Master of Public Administration from Cal Poly Pomona.

Dr. Christine Donis-Keller has worked in the field of education and evaluation research for over 25 years and joined PCG as a research and evaluation specialist in June 2011. Dr. Donis-Keller served on the project team for the Mill Levy Override assessments in D11 in both 2016 and 2019. Evaluation work at PCG includes the evaluation of implementation and impact of the *Paths to College and Career* curriculum in several school districts, the State Systemic Improvement Plan in Indiana, a district-wide arts initiative in Hartford Public Schools; a Family and Community Engagement grant project in Bridgeton, NJ, an impact evaluation of a statewide project to support charter schools' transition to the state standards in Florida, and the impact evaluation of the statewide Tennessee Academic Specialists Program. Additional project work includes a research project on the 1% cap on participation in the alternate assessment in Indiana, special education reviews in Garland, TX, West-Windsor Plainsboro, NJ, Arlington, VA, and Alexandria, VA; an organizational review of the Alabama Department of Education; and a statewide review of educational opportunities in Delaware and equity audits in North Shore School District 112 (IL) and Watertown Public

Schools (MA). She has also worked on progress monitoring in Level 4 and 5 schools in Massachusetts, and a strategic data review for the Bill and Melinda Gates Foundation. In all of these engagements she led the development of research instruments and protocols and conducted interviews, focus groups, surveys, and case studies to understand program effectiveness. Before joining PCG, Dr. Donis-Keller worked for university-based research centers where she led national and state-wide evaluations and research studies. Dr. Donis-Keller received her doctorate in the sociology of education from New York University. She has published reports on theme high schools, the four-day school week, and school district reorganization.

Mary Ellen Hannon is a Senior Associate, who has over 30 years of successful educational systems experience, including extensive understanding in school leadership, data analysis, strategic planning, curriculum development, and policy design and implementation. Mary Ellen served as the Project Director for the MA Department of Elementary and Secondary School's project *Monitoring Teaching and Learning in Level 4 and 5 Schools*. Her responsibilities included leading client meetings, overseeing the development of a classroom monitoring tool, collecting and analyzing school data, facilitating meetings, and developing reports for the Commissioner of Education. Additionally, Mary Ellen served as project director and lead principal coach for the *Saginaw, MI ISD Priority School Coaching* project. Over three years, Mary Ellen partnered with elementary and high schools in Saginaw, Michigan to identify and change practices in the lowest performing urban schools that resulted in low student achievement and high drop-out rates. Mary Ellen also works on organizational and educational audits for schools and state depts of education. Ms. Hannon served as a Subject Matter Expert for the D11 Mill Levy Override assessment in 2016. Currently, she is coaching executive leadership at the AL State Department of Education to support implementation of their Alabama Achieves Strategic Plan. In addition, Mary Ellen is consulting with the DE Dept of Education to support the development of a mentorship program for school leaders statewide.

Before joining PCG Education, Mary Ellen served as a teacher and leader at both the school and District level, including serving as the Superintendent of Schools. Mary Ellen was appointed to the Professional Standards Board, tasked with reviewing teacher certification standards and higher education programs for teacher candidates. Also, Mary Ellen served as an adjunct professor at Rivier University, teaching graduate courses in the educational leadership program.

Isabelle Blair, in her role as a Business Analyst at PCG, provides project management, public outreach, and data analysis support to state and school district clients. She has recently worked on District Equity Audits and Strategic Plans as well as Strategic Communications projects and Special Education Reviews. Prior to joining PCG, Isabelle received her Bachelor of Arts degree in English with a secondary in History from Harvard University. During this time, she worked as a writing tutor for high school students before interning with PCG for her last year and a half of college. As an intern, she conducted research on school districts and higher education as well as assisted in survey and data analysis and coding.

DOCUMENTS REVIEWED FOR THIS REPORT

The following documents were reviewed to inform the analysis and findings presented in the Eighth Biennial/Triennial Assessment of the Mill Levy Override.

- Colorado Department of Education. *Final 2019 District Performance Framework*. [1010-3-Year.pdf](https://www.state.co.us/1010-3-Year.pdf) ([state.co.us](https://www.state.co.us))
- District 11. 2017. *Mill Levy Override Governance Plan*. <https://www.d11.org/cms/lib/CO02201641/Centricity/Domain/181/2017%20Mill%20Levy%20Override%20Governance%20Plan%20Final.pdf>
- District 11. 2019. *Colorado Springs District 11 Strategic Plan*. [D11 Strategic Plan](https://www.schoolwires.net/D11-Strategic-Plan) ([schoolwires.net](https://www.schoolwires.net))

- District 11. 2019. *Strategic Plan: End Results* [5-13-19 End Results Final.pdf \(d11.org\)](#)
- District 11. 2021. *Colorado Springs D11 2021 District Overview*. [D11 Overview \(d11.org\)](#)
- District 11. 2021. *Academic Master Plan*. [Rebuilding / Academic Master Plan \(d11.org\)](#)
- District 11. 2021. *Facilities Master Plan*. [Facilities Master Plan - 20210427.pdf \(d11.org\)](#)
- District 11. 2021. *Phase In Plan*. [Microsoft Word - PIP summary cover \(d11.org\)](#)
- District 11. 2022. *FY 20-21 2000/2017 Mill Levy Override Summary Program Implementation Plans Summary* March 2022.
<https://www.d11.org/site/handlers/filedownload.ashx?moduleinstanceid=461&dataid=73319&FileName=20-21%20MLO%20Annual%20Summary.pdf>
- D11 School Board Agendas and Minutes 2021-2022 School Year.
- D11 Mill Levy Override Oversight Committee (MLOOC) Agendas and Notes: 21-22 School Year, 20-21 School Year, 19-20 School Year.

DATA REVIEWED FOR THIS REPORT:

- State achievement data were collected from the Colorado Department of Education's *Final District Performance Framework for 2018 and 2019*.
- Enrollment data were collected from the Colorado Department of Education's website under *Pupil Membership*.
- Budgetary data were collected from D11's *Adopted Budget Report FY2021-22*.

2019 MLO ASSESSMENT RECOMMENDATIONS

1. Enhance MLO Communication Strategy

- a. Redesign the D11 website to make MLO information easier to access and for stakeholders to better understand the impact of the MLO dollars
 - i. Feature both 2000 and 2017 MLO updates more prominently on the main page of the D11 website
 - ii. Provide more interactive videos and short descriptions on the status of MLO initiatives underway so that it is easier for community members to gauge progress on them and understand the instructional and operational impacts
 - iii. Review other Colorado District websites to see how they share MLO information with their community members
 - iv. Update the information on the progress of MLO initiatives on the website on a routine basis
 - v. Continue featuring MLO news in the monthly superintendent's update
- b. Create 1-page printed updates on the impact of the MLO dollars at least quarterly. Develop an outreach strategy to distribute these updates broadly, especially to those stakeholders who might not access social media. Send these updates to all school-based staff via email.
- c. Ensure that the MLO Communication Strategy is embedded within the District's larger rebranding strategy. With new leadership and the passage of MLO 2017, D11 has a unique opportunity to engage in a marketing approach which can be used as a recruiting and retention tool for both staff and students. The District may consider leveraging marketing guidance from an outside agency in order to leverage and extend all efforts the District is currently implementing.
- d. Set a goal to increase awareness of the MLO for each stakeholder group, as measured by survey data in the next triennial review
- e. Revise language/descriptions for PIPs so they are actionable, concise, and current

2. Establish a Data Dashboard with Key Performance Indicators (KPIs)

- a. Develop measurable KPIs for each PIP, or group of PIPs.
 - i. Gather input from MLO Oversight Committee members, board members, community members, and District staff as to how the KPIs should be developed, what they should measure, and how progress will be tracked. Note areas where initiatives are only partially fully funded through the MLO and document % contribution of MLO dollars.
 - ii. When considering KPIs for each PIP, the District should seek alignment with how the Strategic Plan will be measured in order to determine progress towards its equity goals.
- b. Create a standard reporting template for each PIP, or group of PIPs, and require it be completed by PIP managers at least annually
- c. Consider the development of a complexity index for any staffing models developed or currently in place to factor in all the data which factors into equitable staffing based on student need.

3. Embed MLO initiatives in the Strategic Plan

- a. As currently demonstrated in the Strategic Plan Alignment table, consider shifting the focus to District initiatives first, and then how the MLO supports and contributes to the realization of these goals.
- b. Consider implementing MLO initiatives through an equity lens as well. Misperceptions on how MLO monies are being spent can be mitigated if the District commits to and communicates that MLO funding will still be used in the capacity in which they are written, and disbursement of funds will be made using a decision-making process focused on providing equitable access to learning for all students.