



# LAKE WASHINGTON SCHOOL DISTRICT

## Budget Advisory Committee (BAC)

January 11, 2024

# AGENDA

5:00 – 5:10 p.m. – Welcome, Check-In

5:10 – 5:25 p.m. – Budget Survey Results

5:25 – 5:55 p.m. – Legislative Update

5:55 – 6:00 p.m. – Break

6:00 – 6:15 p.m. – Budget and Board Study Session Update

6:15 – 6:30 p.m. – Community Engagement Update

6:30 – 7:00 p.m. – Questions, Future Workplan

## CHECK-IN ACTIVITY

- What is your first reaction when snow is in the forecast?

Hunker down and read a good book

Run to the grocery store and stock up on food

Dig out the sled from the garage and find the nearest hill

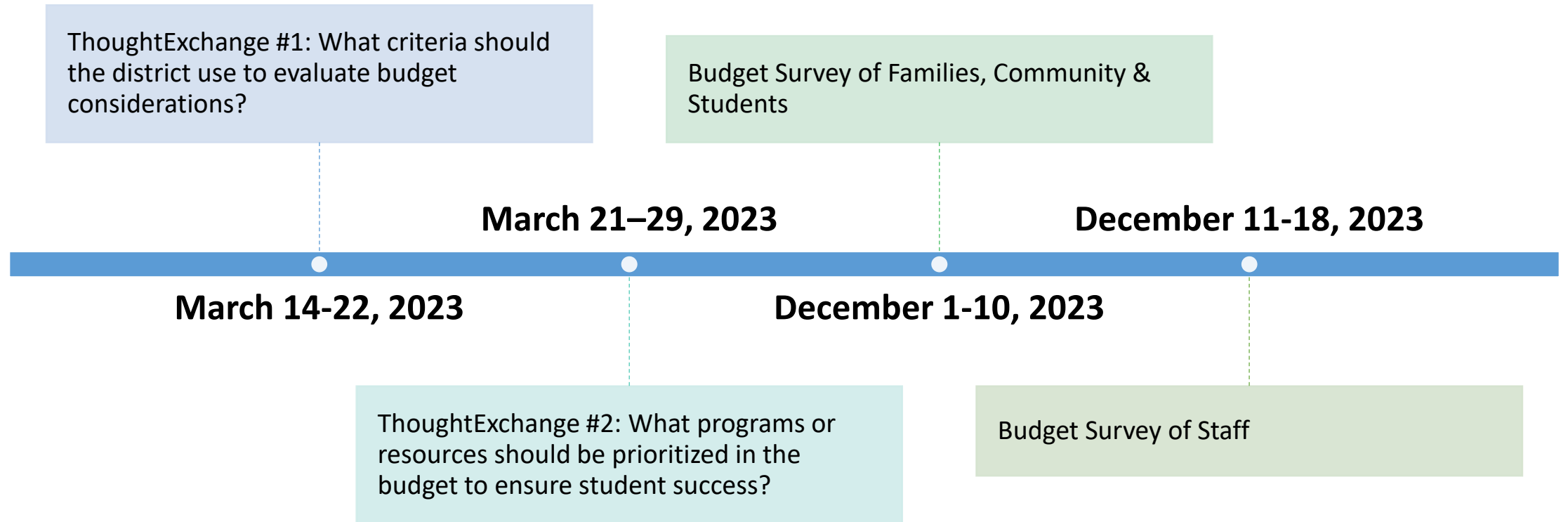
Get the skis and jump in the car and go to the mountains



# Staff Budget Survey Results



# Budget surveys to date



# Staff Survey

## Who Responded?

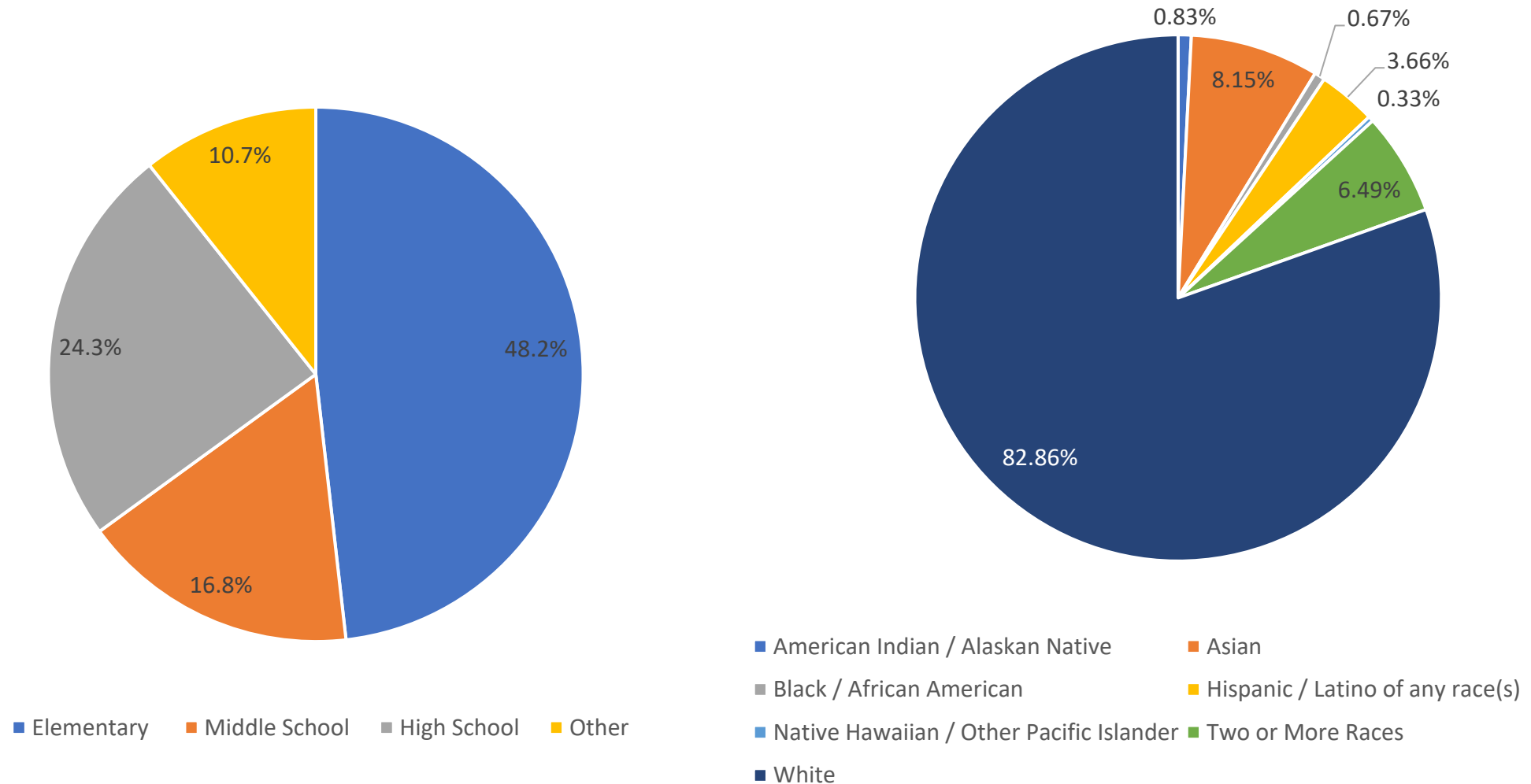
Survey open December 11-18, 2023

**690** LWSD Staff Members

- Elementary - 48.2% (Approximately 333)
- Middle School - 16.8% (Approximately 116)
- High School - 24.3% (Approximately 167)
- Other - 10.7% (Approximately 74)

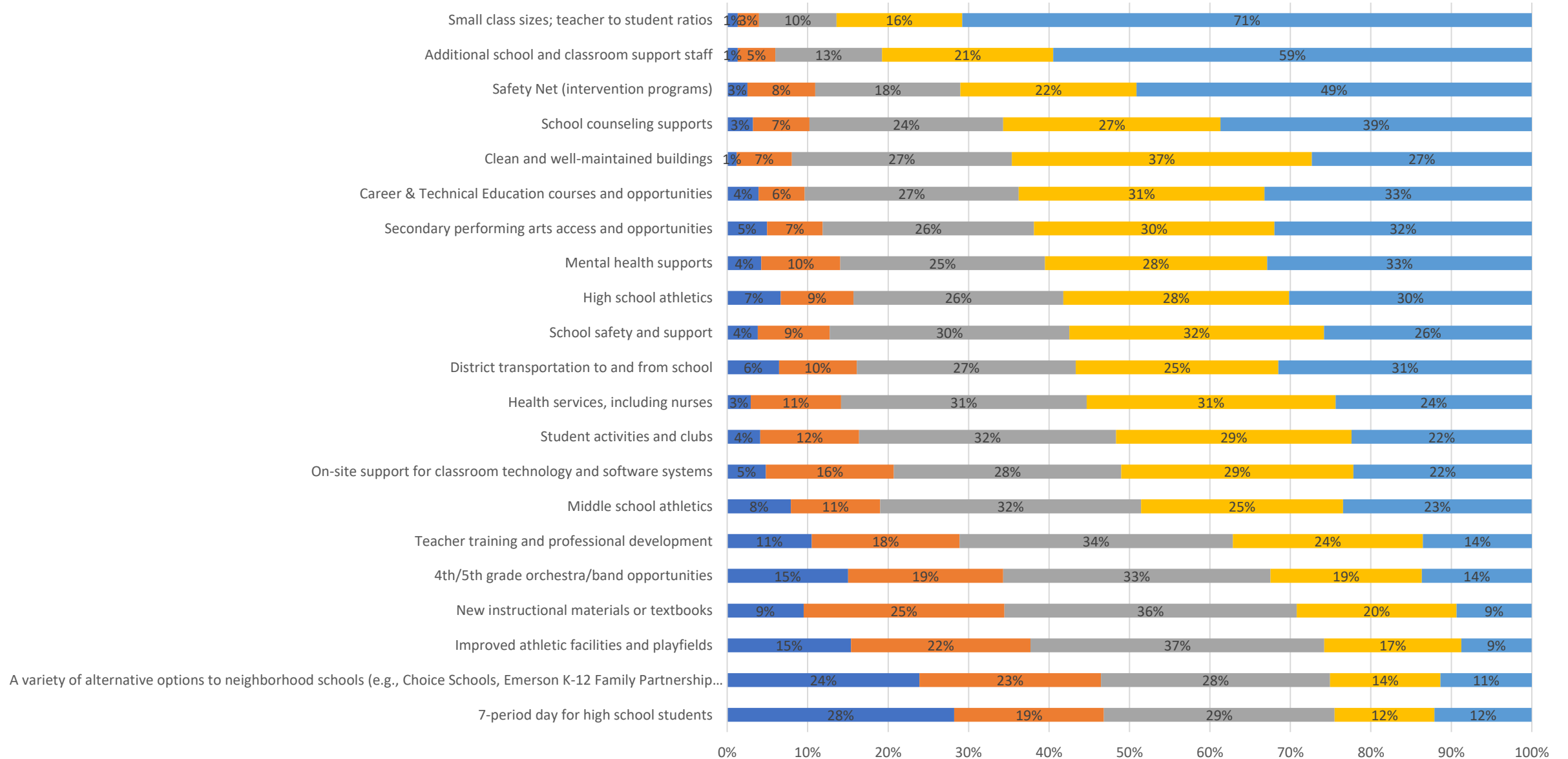


# Demographics – Staff survey



\*Because multiple answers per participant are possible, the total percentage may exceed 100%.

# Overall Results



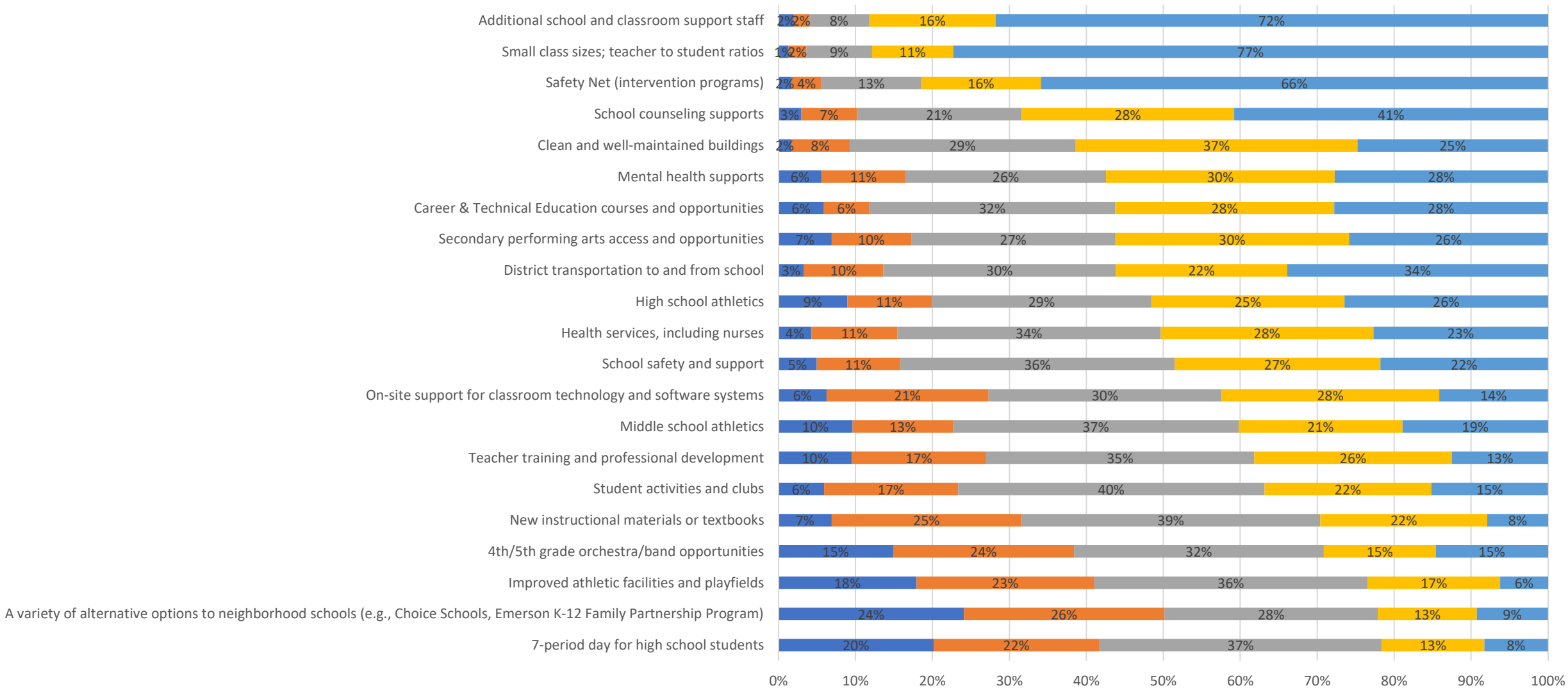




## Overall Results - Staff

TOP RANKED ITEMS
Small class sizes; teacher to student ratios
Additional school and classroom support staff
Safety Net (intervention programs)
School counseling supports
Clean and well-maintained buildings
LOWEST RANKED ITEMS
7-period day for high school students
A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
Improved athletic facilities and playfields
New instructional materials or textbooks
4 <sup>th</sup> /5 <sup>th</sup> grade orchestra/band opportunities

# Elementary Staff Results

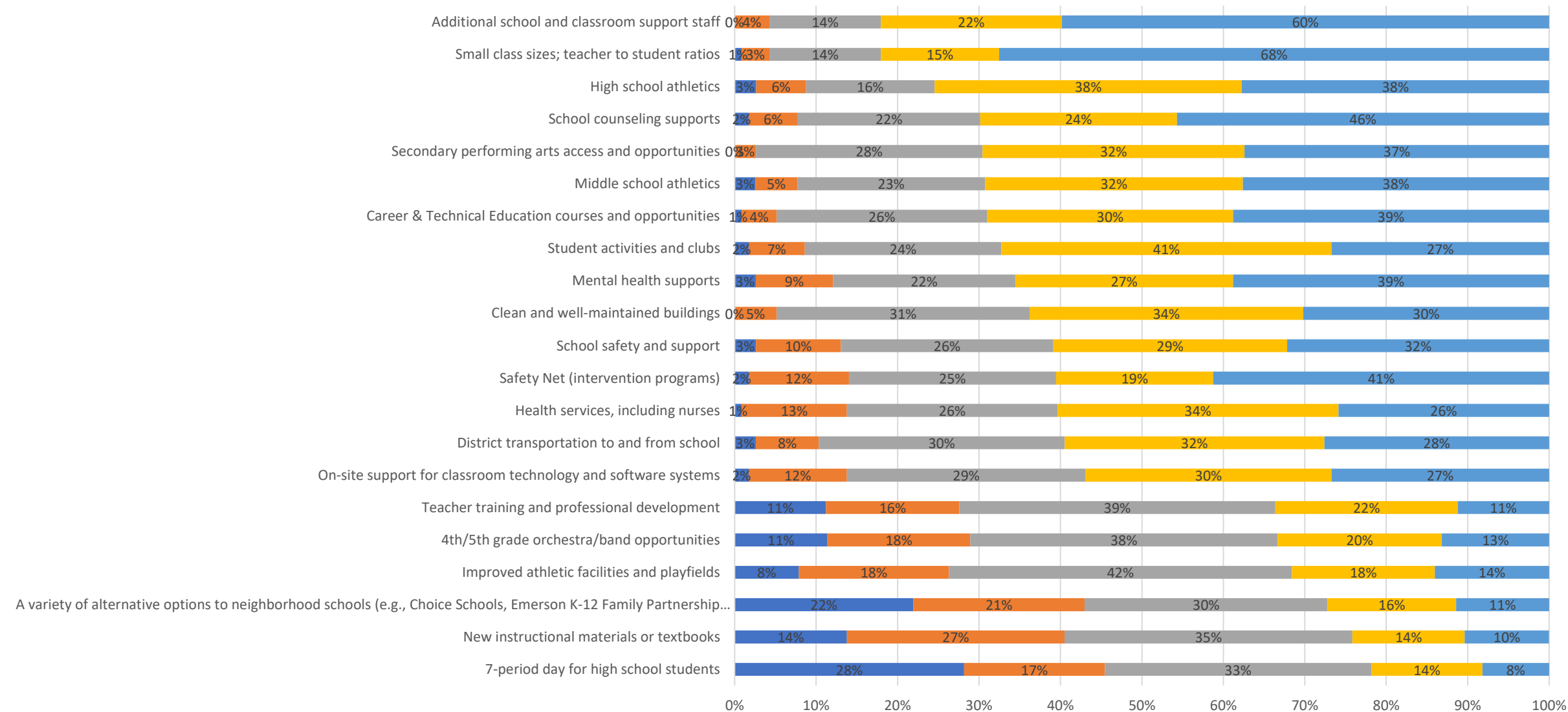




# Elementary Staff Results

TOP RANKED ITEMS
Additional school and classroom support staff
Small class sizes; teacher to student ratio
Safety Net (intervention programs)
School counseling supports
Clean and well-maintained buildings
LOWEST RANKED ITEMS
7-period day for high school students
A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
Improved athletic facilities and playfields
4th/5th grade orchestra/band opportunities
New instructional materials or textbooks

# Middle School Staff Results

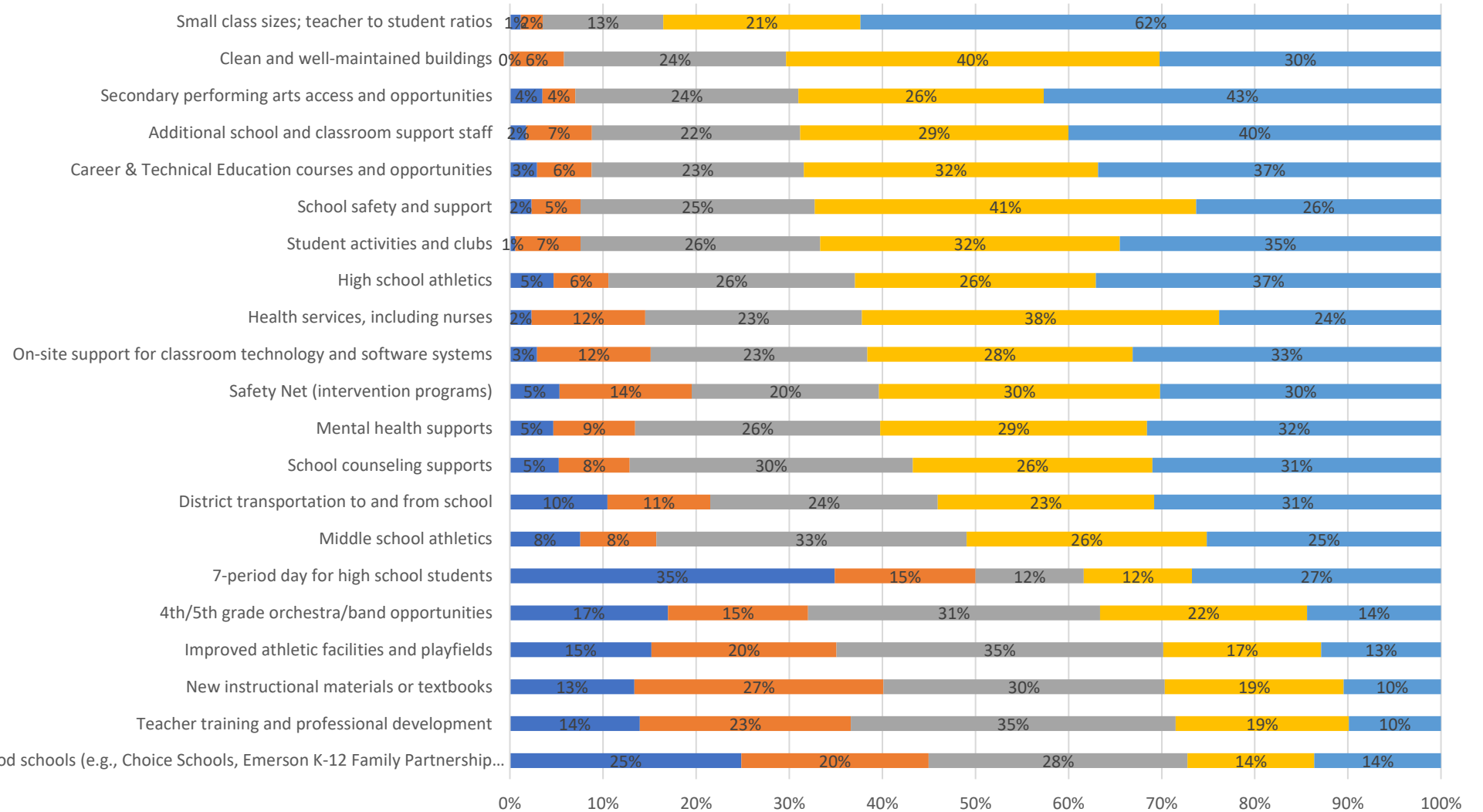




# Middle School Staff Results

TOP RANKED ITEMS
Additional school and classroom support staff
Small class sizes; teacher to student ratios
High school athletics
School counseling supports
Secondary performing arts access and opportunities
LOWEST RANKED ITEMS
7-period day for high school students
New instructional materials or textbooks
A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
Improved athletic facilities and playfields
4th/5th grade orchestra/band opportunities

# High School Staff Results







# High School Staff Results

## **TOP RANKED ITEMS**

Small class sizes; teacher to student ratios

Clean and well-maintained buildings

Secondary performing arts access and opportunities

Additional school and classroom support staff

Career & Technical Education courses and opportunities

## **LOWEST RANKED ITEMS**

A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)

Teacher training and professional development

New instructional materials or textbooks

Improved athletic facilities and playfields

4th/5th grade orchestra/band opportunities

# Comparison of Top Results by Staff Group

## Top Results – Elementary Staff

- Additional school and classroom support staff
- Small class sizes; teacher to student ratio
- Safety Net (intervention programs)
- School counseling supports
- Clean and well-maintained buildings

## Top Results – High School Staff

- Small class sizes; teacher to student ratios
- Clean and well-maintained buildings
- Secondary performing arts access and opportunities
- Additional school and classroom support staff
- Career & Technical Education courses and opportunities

## Top Results – Middle School Staff

- Additional school and classroom support staff
- Small class sizes; teacher to student ratios
- High school athletics
- School counseling supports
- Secondary performing arts access and opportunities

## Top Results – Overall

- Small class sizes; teacher to student ratios
- Additional school and classroom support staff
- Safety Net (intervention programs)
- School counseling supports
- Clean and well-maintained buildings

# Comparison of Lowest Results by Staff Group

## Lowest Results – Elementary Staff

- 7-period day for high school students
- A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
- Improved athletic facilities and playfields
- 4th/5th grade orchestra/band opportunities
- New instructional materials or textbooks

## Lowest Results – High School Staff

- A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
- Teacher training and professional development
- New instructional materials or textbooks
- Improved athletic facilities and playfields
- 4th/5th grade orchestra/band opportunities

## Lowest Results – Middle School Staff

- 7-period day for high school students
- New instructional materials or textbooks
- A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
- Improved athletic facilities and playfields
- 4th/5th grade orchestra/band opportunities

## Lowest Results – Overall

- 7-period day for high school students
- A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
- Improved athletic facilities and playfields
- New instructional materials or textbooks
- 4th/5th grade orchestra/band opportunities

Open-Ended Question: Is there a service, support, or program that has positively affected student's academic success or overall wellbeing that wasn't listed? If so, please share what it is.



# Top Themes - Staff

Is there a service, support, or program that has positively affected you or your student's academic success or overall well-being that wasn't listed? If so, please share what it is.

- ML Services

## **Reiterated Support for:**

- Safety Net
- Classroom Support Staff
- Small Class Sizes



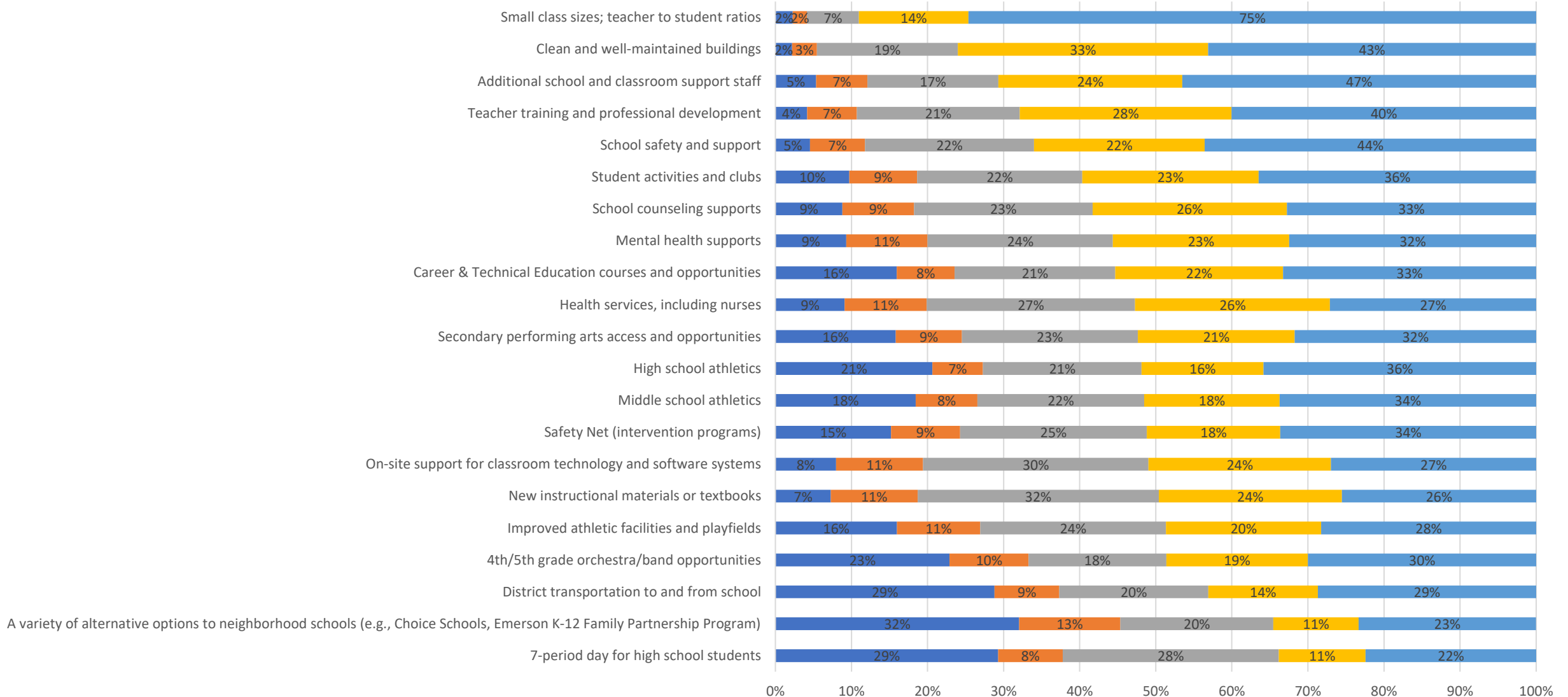


A large field of white umbrellas, with one blue umbrella standing out in the center. The umbrellas are arranged in a dense, repeating pattern, creating a sense of depth and scale. The blue umbrella is positioned slightly to the right of the center, drawing the viewer's eye.

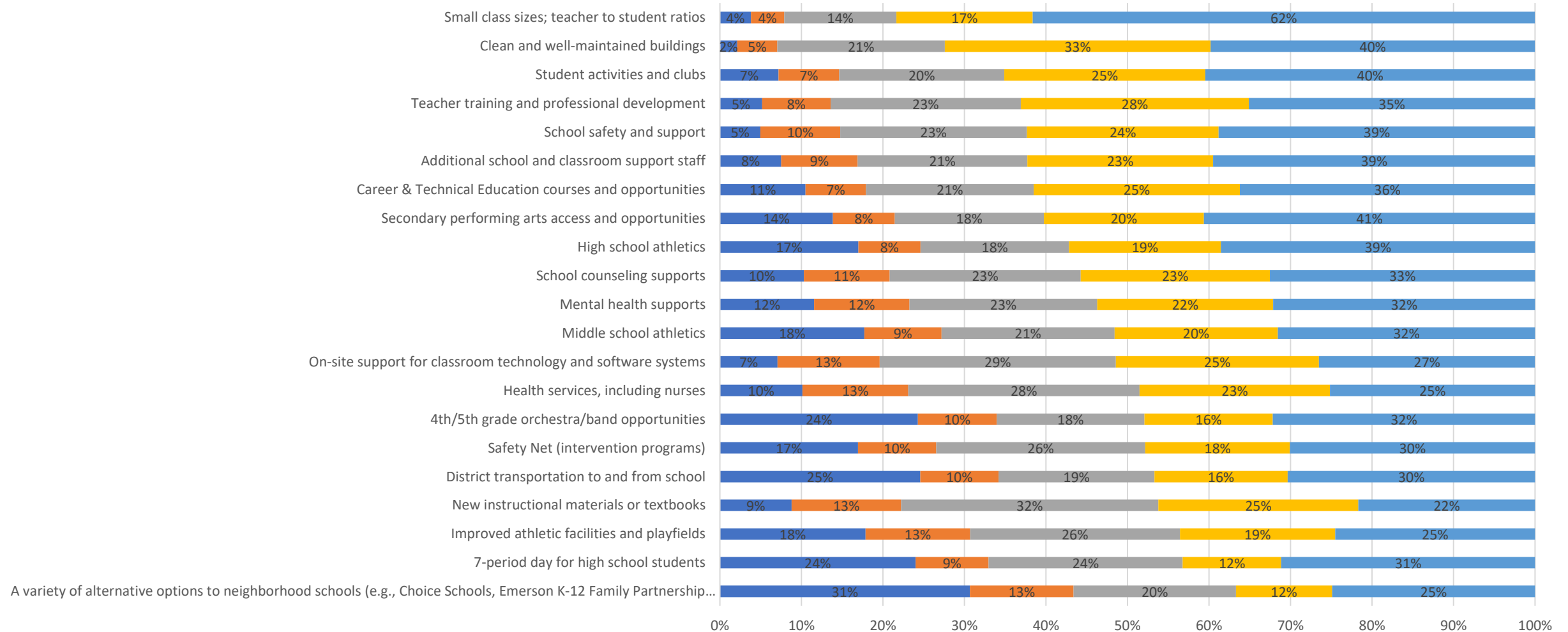
# Breakdown of Family/Community/Student Survey by Level



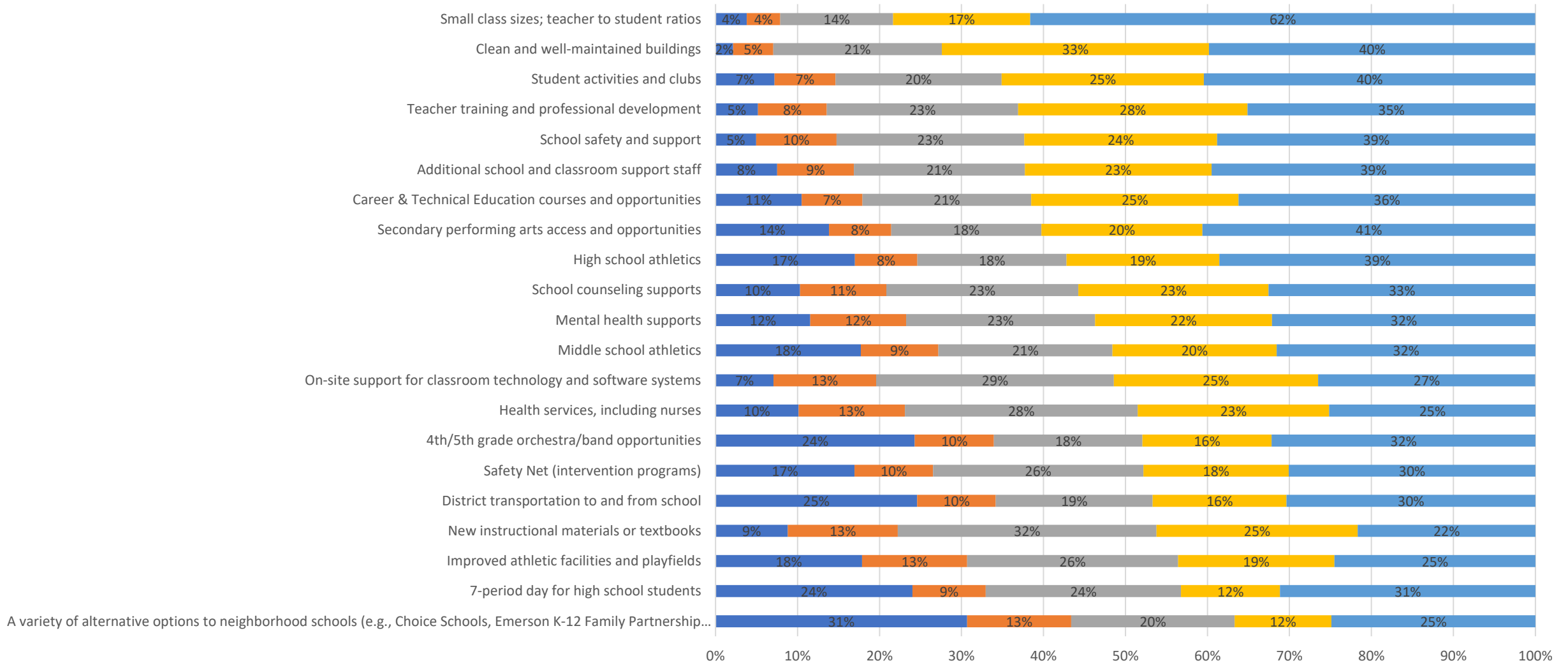
# Family/Community/Student Survey by Level - Elementary



# Family/Community/Student Survey by Level - Secondary



# Family/Community/Student Survey by Level - Other



# Family/Community/Student Survey Comparison of Top Results by Level

## Top Results – Elementary

- Small class sizes; teacher-to-student ratio
- Clean and well-maintained buildings
- Additional school and classroom support staff
- Teacher training and professional development
- School safety and support

## Top Results – Other

- Small class sizes; teacher-to-student ratios
- Clean and well-maintained buildings
- Student activities and clubs
- Teacher training and professional development
- School safety and support

## Top Results – Secondary

- Small class sizes; teacher-to-student ratios
- Clean and well-maintained buildings
- Student activities and clubs
- Teacher training and professional development
- School safety and support

## Top Results – Overall

- Small class sizes; teacher-to-student ratios
- Clean and well-maintained buildings
- Student activities and clubs
- Teacher training and professional development
- School safety and support

# Family/Community/Student Survey

## Comparison of Lowest Results by Level

### Lowest Results – Elementary

- 7-period day for high school students
- A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
- District transportation to and from school
- 4th/5th grade orchestra/band opportunities
- Improved athletic facilities and playfields

### Lowest Results – Other

- A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
- 7-period day for high school students
- Improved athletic facilities and playfields
- New instructional materials or textbooks
- District transportation to and from school

### Lowest Results – Secondary

- A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
- 7-period day for high school students
- Improved athletic facilities and playfields
- New instructional materials or textbooks
- District transportation to and from school

### Lowest Results – Overall

- A variety of alternative options to neighborhood schools (e.g., Choice Schools, Emerson K-12 Family Partnership Program)
- 7-period day for high school students
- Improved athletic facilities and playfields
- New instructional materials or textbooks
- District transportation to and from school



# LEGISLATIVE PRIORITIES





## Lake Washington School District

### 2024 Legislative Priorities

*Supporting Every Student  
and the Whole Child*



### Diversity, Equity & Inclusion

- Fully fund special education programs and staffing to align with inclusionary practices
- Update the transportation funding formula to provide clarity and predictability for districts ensuring equitable access to schools
- Authorize alternative teacher training and certification programs to attract, recruit, and retain high-quality, diverse staff

### Student Support & Achievement

- Continue to increase staffing allocations in the prototypical model to reflect the actual staff required for student learning and student social-emotional health without impacting local levy funds
- Increase funding for necessary substitutes to reflect the actual cost
- Require a detailed fiscal note on all proposed legislation that affect school districts and corresponding funding

### Sustainability

- Develop new funding models to transition transportation systems and infrastructure to zero-emissions vehicles by 2030
- Incentivize funding for sustainable design and construction of school buildings that ensure optimal health and productivity for students and staff

### Modern Learning Facilities

- Advance a constitutional amendment that authorizes simple majority for school bond passage
- Change non-voted debt rules to be consistent with other capital funding rules

### Future-Ready Schools

- Create a funding mechanism to support school-based health and wellness centers providing basic physical and mental health services
- Direct OSPI to develop guidance on innovative, equitable and responsible use of AI technologies throughout the K-12 education system



**LWSD Board of Directors:**  
Leah Choi, President  
Eric Laliberte, Vice President  
Mark Stuart, Legislative Representative  
Siri Bliesner, Director  
Lisa Guthrie, Director  
[boardmembers@lwsd.org](mailto:boardmembers@lwsd.org)

**LWSD Superintendent:**  
Dr. Jon Holmen  
[superintendent@lwsd.org](mailto:superintendent@lwsd.org)



# LAKE WASHINGTON SCHOOL DISTRICT 2024 LEGISLATIVE PLATFORM TOPICS

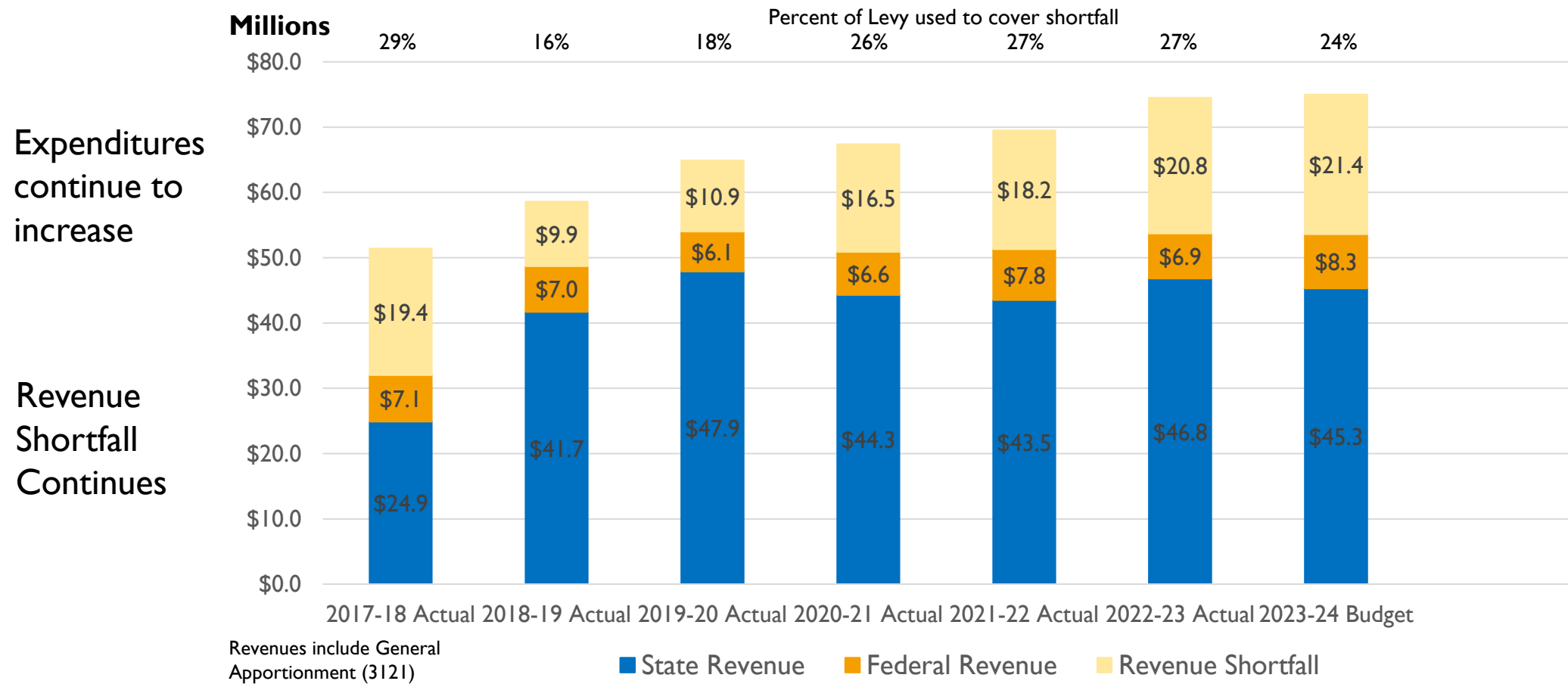
## SUMMARY

- Diversity, Equity & Inclusion
- Student Support & Achievement
- Sustainability
- Modern Learning Facilities
- Future-Ready Schools



# DIVERSITY, EQUITY AND INCLUSION

## FULLY FUND SPECIAL EDUCATION



# FULLY FUND SPECIAL EDUCATION

- Approximately 9.2% of LWSD students qualify for special education services.
- LWSD spends over \$74 million (13.5%) of district budget on special education for students
- The per-pupil multiplier needs to be increased to 1.81 to eliminate the gap,
  - In 2023 OSPI recommended a 33% increase to the Tier 1 (from .995 to 1.325) and Tier 2 (from 1.0075 to 1.337) rates. This would have provided \$9.1 million additional revenue to LWSD.

# STUDENT SUPPORT AND ACHIEVEMENT STAFFING

- Continue to increase staffing allocations in the prototypical model to reflect the actual staff required for student learning and student social-emotional health without impacting local levy funds



Lake Washington School District hires over 190 certificated and classified staff that the state does not provide funding for.



The state only funds 12.9% of substitute and leave costs, leaving a gap of \$6.1 million. The state formula provides limited funding for certificated substitutes and no funding for classified substitutes.



When compensation changes are made at the state level, districts are impacted due to the funding gap between funding and what programs and services cost.

- For example, for every 1.0% of a change in state compensation it costs the district \$1.0-\$1.5 million in local funding



# FUND RECOMMENDATIONS OF STAFFING ENRICHMENT WORKGROUP

- Legislature implemented a “prototypical school model” in 2011 providing new staffing allocations that were cost neutral to the prior staffing model. Funding levels for most staff positions have remained the same since 2011.
- In 2014 – Initiative 1351 was approved by voters and provided for phased in increases in staffing allocations in the Prototypical Funding model. In 2017, the McCleary solution repealed the implementation schedule.



# LAKE WASHINGTON SCHOOL DISTRICT

## District Actions

- Meet with legislators before and after session
- Monitoring bills and upcoming hearings
- Administrators testify during hearings – testified on three bills just this week
- Provided follow up as needed via email or additional meetings
- Direct outreach to individual legislators on bills of interest
- Legislative Conference in Olympia, continue meeting with legislators

## What Can the Community Do?

- Reach out to legislators
- Encourage legislators to support LWSD priorities
- Remind legislators not to implement new requirements without ADEQUATE funding



# BUDGET TIMELINE AND NEXT STEPS

FROM BOARD STUDY SESSION JANUARY 8





# TIMELINE AND NEXT STEPS

January/Feb

- Community Informational Forums

Feb

- Updated Long-range enrollment forecast
- Mid-Year budget projections/update assumptions

March-May

- District receives legislative funding level and new mandates/impacts
- Budget Recommendations/Budget Office develops budget

June

- Board Study Session
- Board Meeting - Budget Presentation /Public feedback period begins

August

- Board holds Public Hearing
- Board Action to adopt 2024-25 Budget

# GENERAL FUND BUDGET - PRELIMINARY FOUR-YEAR OUTLOOK

## NO ASSUMED REDUCTION IN EXPENDITURES

	2022-23 Actual	2023-24 Budget	2023-24 Estimated	2024-25 Estimated	2025-26 Estimated	2026-27 Estimated
Beginning Fund Balance	\$75.7	\$49.2	\$57.3	\$50.8	\$41.2	\$28.7
Reserve for Carryover	\$11.7	\$0.0	\$10.6	\$0.0	\$0.0	\$0.0
Revenues	\$512.2	\$548.5	\$524.8	\$567.4	\$577.0	\$585.3
Expenditures	\$531.7	\$556.2	\$541.9	\$577.0	\$589.5	\$596.6
Ending Fund Balance	\$57.3	\$41.5	\$50.8	\$41.2	\$28.7	\$17.4
Reserve for Carryover	\$10.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Planned Use of Fund Balance	(\$19.5)	(\$7.7)	(\$17.1)	(\$9.6)	(\$12.5)	(\$11.3)
Required Reductions		(\$4.8)	(\$4.8)	TBD	TBD	TBD

Expenditures continue to exceed revenues. Ending Fund Balance is below 5% minimum.

# BUDGET REDUCTION OPTIONS

Target \$11-15 million over next two years

## Options

1. All reductions implemented for 2024-25
2. All reductions implemented for 2025-26
3. Balanced reductions over two years
4. Limited reductions in 2024-25, larger reduction in 2025-26

- Variables: Enrollment, legislative impacts, fixed costs

# BUDGET REDUCTION OPTIONS

## Option I: All reductions implemented for 2024-25

### Opportunities

- Immediate impact
- Reduced impact on fund balance

### Risks

- Potential of additional information (enrollment, legislative funding) could change need or requirement
- Not responsive to current committee and task forces work
- Limited time for engagement and communication

# BUDGET REDUCTION OPTIONS

## Option 2: All reductions implemented in 2025-26

### Opportunities

- Eliminates immediate impact
- Responsive to current committee and task force work
- Allows more time for community engagement
- More clarity on enrollment trends

### Risks

- Greater impact in 2025-26
- Delays opportunity for right sizing budgets, aligning staffing models

# BUDGET REDUCTION OPTIONS

## Option 3: Balanced reductions over two years

### Opportunities

- Smaller reductions over time
- Consistent with messaging regarding reductions
- Limits immediate impact
- Right sizes fund balance
- Continues opportunity for right sizing budgets, aligning staffing models

### Risks

- Potential of additional information (enrollment, legislative funding) could change need or requirement
- Not fully responsive to current committee and task force work
- Limited time for engagement and communication
- Prematurely cut a program that is beneficial for students

# BUDGET REDUCTION OPTIONS

## Option 4: Limited reductions in 2024-25, larger reduction in 2025-26

### Opportunities

- Reduces immediate impact
- Continues opportunity for right sizing budgets, aligning staffing models
- Responsive to current committee and task force work
- Right sizes fund balance

### Risks

- Greater impact in 2025-26
- Increased impact on fund balance

- 
- Are there other risks or opportunities to consider?







# COMMUNITY ENGAGEMENT



# COMMUNITY ENGAGEMENT

## BAC FEEDBACK FROM DECEMBER MEETING

*As we think about designing future engagement activities, what information would be helpful?*

### Education – share information on:

- What we can't change vs. what there is flexibility on
- How state funding sources work
- Share how the local levy is limited, optimized
- Provide perspective on costs/size of categories
- Use as an opportunity to ask for donations
- Show how districts have responded to previous surveys
- Graphics

### Engagement Strategies:

- Ensures schools encourage participation
- Sessions for community not familiar with U.S. education system
- Schools/PTSA provide hand out/send communication
- Budget Games at school events
- Prioritization strategies: simulation of potential cuts, digital survey strategies, dot exercises

# MICROSOFT TEAMS LIVE EVENT – ABOUT THE PRESENTATION

- Presentation format featuring Barbara Posthumus and Dr. Jon Holmen (Superintendent).
- Infographics will be used throughout the presentation.
- Opportunity for live Question & Answer (Q&A) session.
- Allows for live translations in up to six languages.
- Can be recorded and shared out via our website/social media.
- Allows for up to 20,000 attendees.
- Attendees don't have to travel to attend an evening event.
- Any questions we cannot answer live can be put into a Q&A on the website and shared in future communications.
- Opportunity for Budget Advisory Committee members to participate.



# MICROSOFT TEAMS LIVE EVENT - PROMOTION

## How we'll promote the event:

- ParentSquare invitations.
- Flyers at Parent/Teacher conferences.
- Flyers on Peachjar.
- Website post.
- Social media posts.





# FUTURE WORKPLAN



# COMMITTEE MEETING DATES

All meeting held from 5:00 p.m. to 7:00 p.m. at the Resource Center

Date	Topics
October 12, 2023	Welcome and Introductions, review committee purpose and schedule; basic introduction to school district finance in Washington State and LWSD Budget
November 9, 2023	Enrollment and budget update; review prior year year-end results, provide input on draft budget survey
December 14, 2023	Review Spring 2023 Thought Exchange priorities survey and preliminary budget survey results
January 11, 2024	Review staff budget survey results, budget study session update, Community Engagement update

# COMMITTEE MEETING DATES

Potential future topics

Date	Potential Topics
February 8, 2024	Community Engagement update, Review monthly financial reports, Legislative update, FAQ
March 14, 2024	Review mid-year financial projections, update on enrollment projections
April 18, 2024	Update on budget outlook, legislative update
May 2, 2024	Review key budget issues for preliminary budget
June 13, 2024	Review preliminary budget and related financial forecast

Before you go...

Please take a few minutes to share your thoughts on potential topics to cover in future Budget Advisory Committee meetings via our online form.

## Budget Advisory Committee



<https://forms.office.com/r/ZpxBsPW1F3>