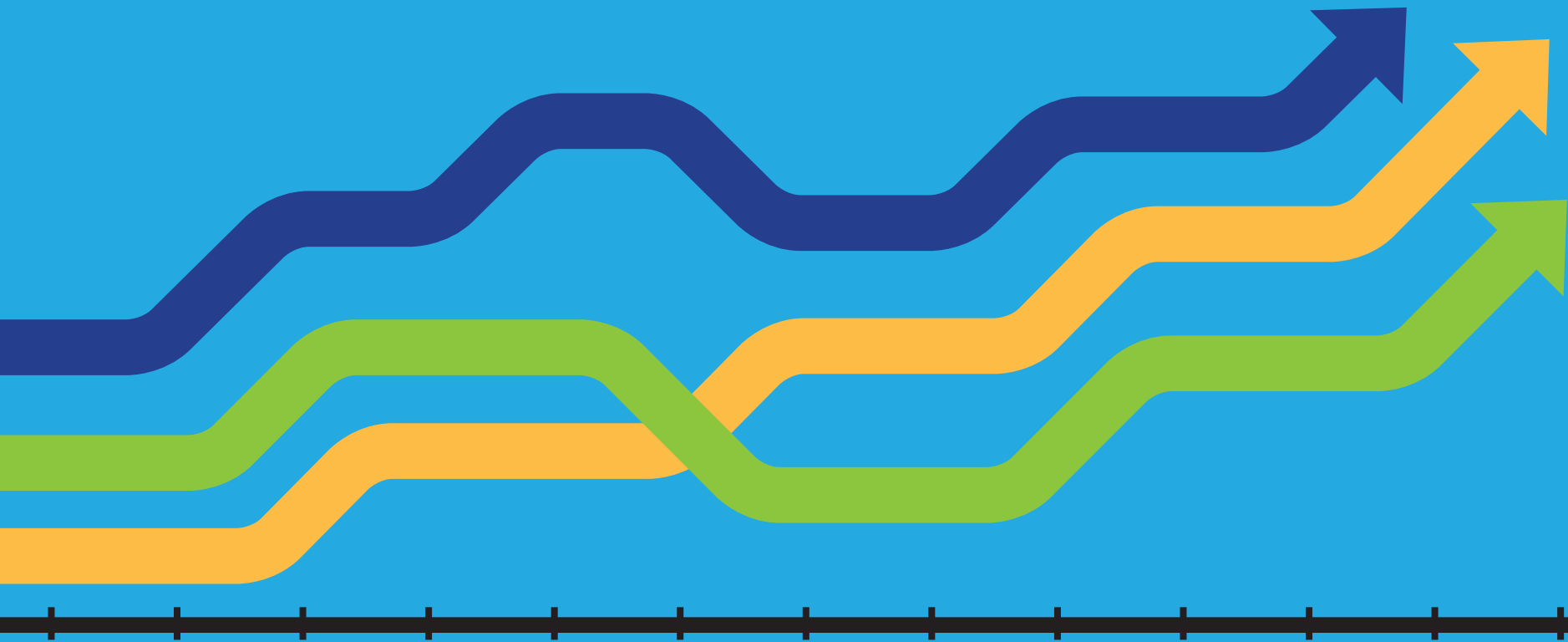


SAMPLE

# Beaverton School District Multiyear Finance Plan

2016 - 2020



## November 2016 Election will impact future revenue

### Measure 97 Oregon Business Tax Increase

Beaverton School District  
Impact for 2017-18

If passes:  
+\$38 million

If fails:  
(\$25 million)

### Measure 98 Career and College Readiness

Beaverton School District  
Impact for 2017-18

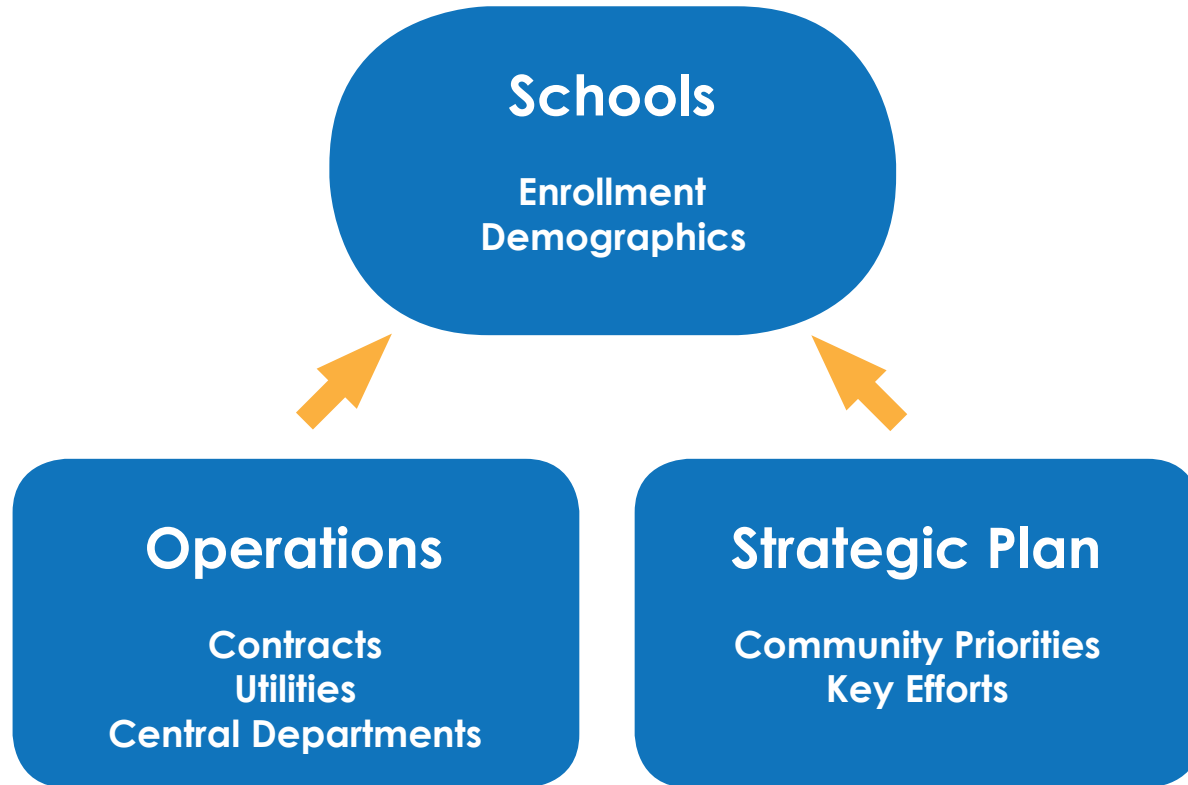
If passes:  
+\$10 million is available  
for Beaverton

### Measure 99 Outdoor School

Beaverton School District  
Impact for 2017-18

If passes:  
+\$1.5 million

# Overview of the Plan



## Introduction

### What is a Multiyear Finance Plan?

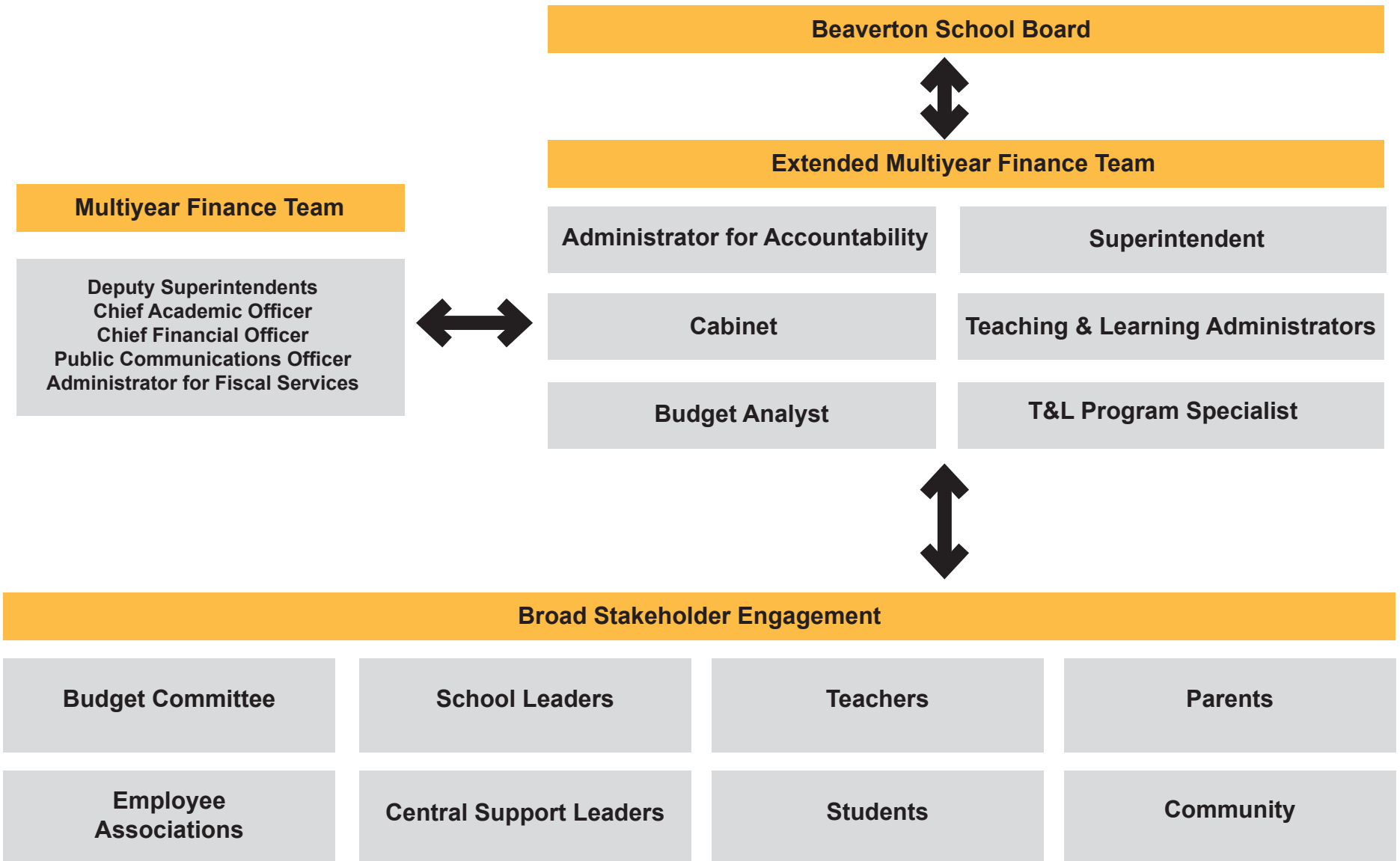
	What It Is Not	What It Is
Timeframe	An Annual Budget	A three to five year financial plan determining the District's investments to meet the strategic plan measures of the District goal and identifying the source of funds to make the investments possible
Link to Strategic Priorities	Current Service Level rollup based on historical trends without clear ties to strategic plan	Targeted investments are aligned to the District goal and Pillars of Learning and estimates the cost of implementing the priorities over time
Program Effectiveness & Return on Investment	Not connected to program evaluation or investment effectiveness	Evaluation of program effectiveness is essential to the decision-making process to deliver on the District's strategic investments
Responsiveness to Changing Circumstances	Static	Financial Plan is updated each year with consideration of revenue, student enrollment and program effectiveness
Stakeholder Engagement	Created based on input from a small group	Includes input from a broad set of stakeholders

The Multiyear Finance Plan does not replace the annual budget, and serves as a starting point for guiding the budget process each year.

The annual budget includes single year actions to support resource alignment described in the Multiyear Finance Plan and includes operational necessities such as fuel costs, utility costs and employee salaries and benefits.

# Process

## Governance Structure for development of Multiyear Finance Plan



# Process

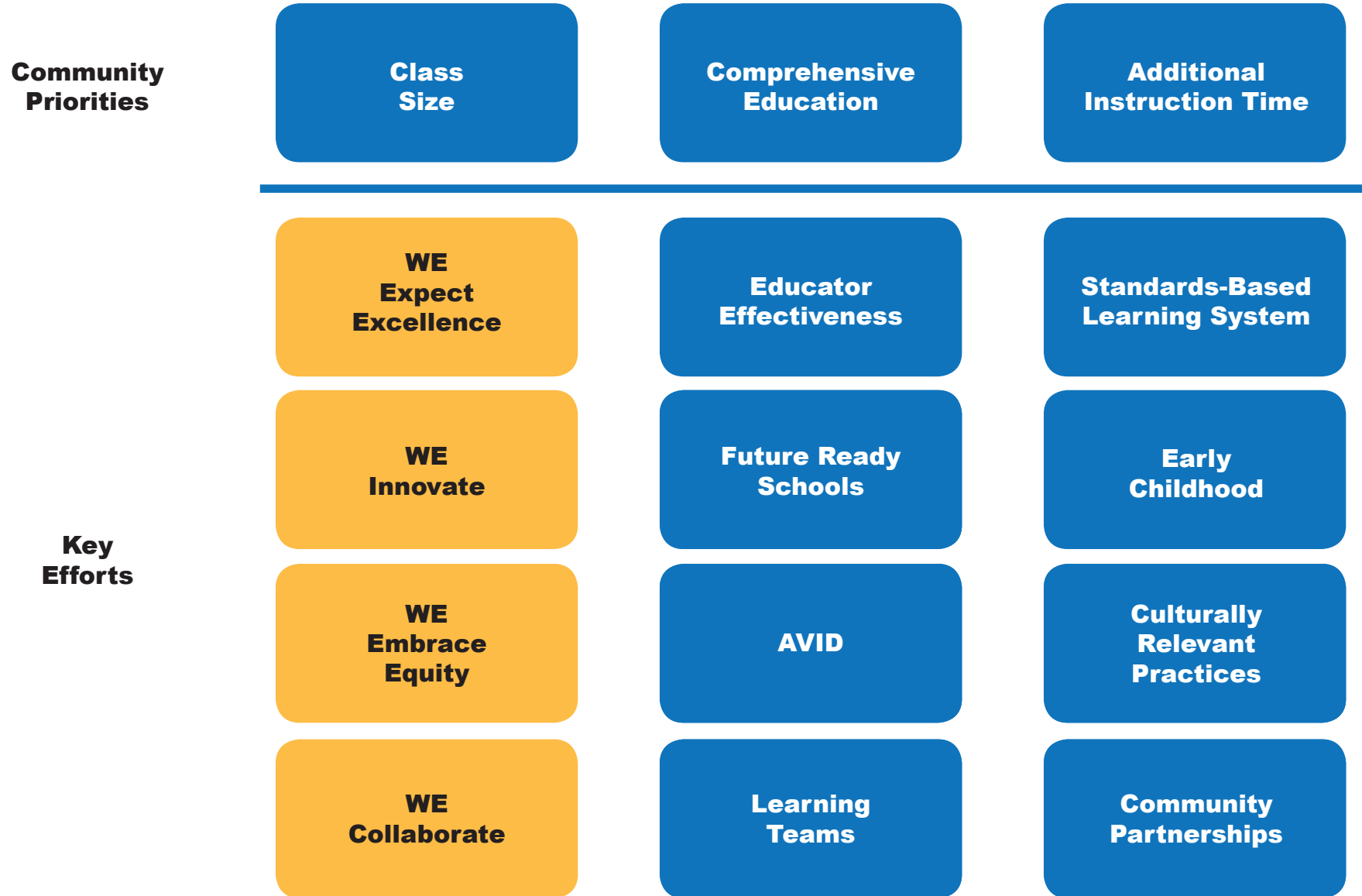
The creation of the Multiyear Finance Plan/formal Budget Process will involve significant input from a broad base of stakeholder groups. Information will be transparent and we will seek continuous improvement.



	Audience	Multiyear Financial Plan Process JUNE - DECEMBER	Annual Budget Process JANUARY - JUNE
<b>Summary Communication Plan</b>  <b>Key Input Groups &amp; Formats</b>	School Board	- October Work Session - December Set Financial Goals at School Board Meeting	Budget Process
	Financial Plan Working Group	Meeting 1x per month with Teaching & Learning Leaders	Internal Budget Process
	Principals	Monthly Principal meetings beginning in October	Monthly Principals Meeting
	Staff, Parents, Community, Budget Committee	November - Multiyear Listening & Learning Sessions - Survey in November	January & February Listening & Learning Sessions
	Students	Focus groups w/ Supt., Cabinet members, Beaverton Student Advisory Council (BSAC)	Focus groups w/ Supt and Cabinet members

# Investments

Analysis and additional stakeholder feedback pointed to specific investments and goals



Finance: Maintain 5% general fund balance and 5% rainy day fund

# Investment Priorities

Shorter Term: 1-2 years | Medium Term: 2-3 years | Longer Term: 3-5 years

Investments	Phase-In Timeline
Class Size	<p><b>Short Term:</b> Reduce class size K-12 ratio by 1.0</p> <p><b>Medium Term:</b> Reduce class size K-12 ratio by additional 0.5</p> <p><b>Longer Term:</b> Maintain K-12 class size ratios</p>
Comprehensive Education	<p><b>Short Term:</b> Enhance current CTE Program of Study (POS) options for students at Aloha HS. Continue working with current CTE POS'S across the district to enhance and revitalize. Research district wide CTE tech center and identify industry partners.</p> <p><b>Medium Term:</b> Every comprehensive middle school provides band, choir, art and second language options. Phase in K-12 multi-language educational opportunity that parallels feeder patterns. Second language options available at all elementary schools. All schools K-8 meeting PE instructional time requirements. Propose a district wide CTE tech center and/or multi district wide tech center.</p> <p><b>Longer Term:</b> Expand CTE coursework options for students across the District to greatly increase the percentage of students who complete a CTE Program of Study prior to graduation. This includes school specific magnet programs and District wide CTE options programs. Full implementation of CTE vision, including an off-site campus for certain CTE programs.</p>
Additional instructional time	<p><b>Short Term:</b> BEA Contract</p> <p><b>Medium Term:</b></p>
Educator Effectiveness	<p><b>Short Term:</b> One to three full time instructional coaches (based on school size). Increase frequency and amount of instructional feedback to teachers by decreasing teacher/admin ratio from 34 to 30. Coaching and support for Central Office and Building Administrators in Educator Effectiveness (CEL).</p> <p><b>Medium Term:</b> Increase frequency and amount of instructional feedback to teachers by decreasing teacher/admin ratio in schools from 30 to 28.</p>
Standards-Based Learning System	<p><b>Short Term:</b> Professional development for ELA and math. Continue SBLS work, including: content area articulation, refinement of learning targets, collaboration time for moderation, and grading and reporting.</p> <p><b>Medium Term:</b> Professional development for ELA, mathematics, and PE/Health.</p> <p><b>Longer Term:</b> Professional development for future QCC implementations.</p>



## Investment Priorities

<b>Future Ready</b>	<p><b>Short Term:</b> LITTs in every school</p> <p><b>Medium Term:</b> Sustained Future Ready professional development budget. Continue model of Innovation Strategists support to schools.</p> <p><b>Longer Term:</b> Fund new and replacement student device purchases through general fund.</p>
<b>Early Childhood</b>	<p><b>Short Term:</b> Develop district plan for Early Childhood Education to address student academic, social and emotional disparities.</p> <p><b>Medium Term:</b> Increase the number of pre-K students receiving high quality early childhood education services.</p>
<b>AVID</b>	<p><b>Short Term:</b> Develop district plan to recruit, retain and compensate AVID tutors at 7:1 ratio. 100% of schools are AVID certified and 50% of schools meet the Site of Distinction metrics. Hire Community Resource Coordinator to help recruit, retain and recognize tutor volunteers.</p> <p><b>Medium Term:</b> Implement AVID at three Title I Elementary schools. Compensate 50% of AVID tutors who are not peer tutors. 75% of schools meet the Site of Distinction metrics, and one school is a National Demonstration site.</p> <p><b>Long Term:</b> Implement AVID at five Title I Elementary schools. Compensate 100% of AVID tutors who are not employees. 100% of schools meet the Site of Distinction metrics, and three schools become a National Demonstration site.</p>
<b>Culturally Relevant Practices</b>	<p><b>Short Term:</b> 2-day training on CRT: “Transforming Educators” training for 50 teacher leaders and new administrators. 2-day training on CRT: “Empowering Students” training for 50 teacher leaders. Restorative practices PD for certified staff.</p> <p><b>Medium Term:</b> Develop plan for continuing Culturally Relevant Teaching.</p>
<b>Learning Teams</b>	<p><b>Short Term:</b> Elementary Learning Team leaders.</p> <p><b>Medium Term:</b> Provide teachers with 90 minutes of collaboration time weekly.</p> <p><b>Long Term:</b> Continue providing teachers with 90 minutes of collaboration time weekly.</p>
<b>Community Partnerships</b>	<p><b>Short Term:</b> Hire Community Resource Coordinator to support Community Partnership Teams by connecting community volunteers to schools as requested.</p>

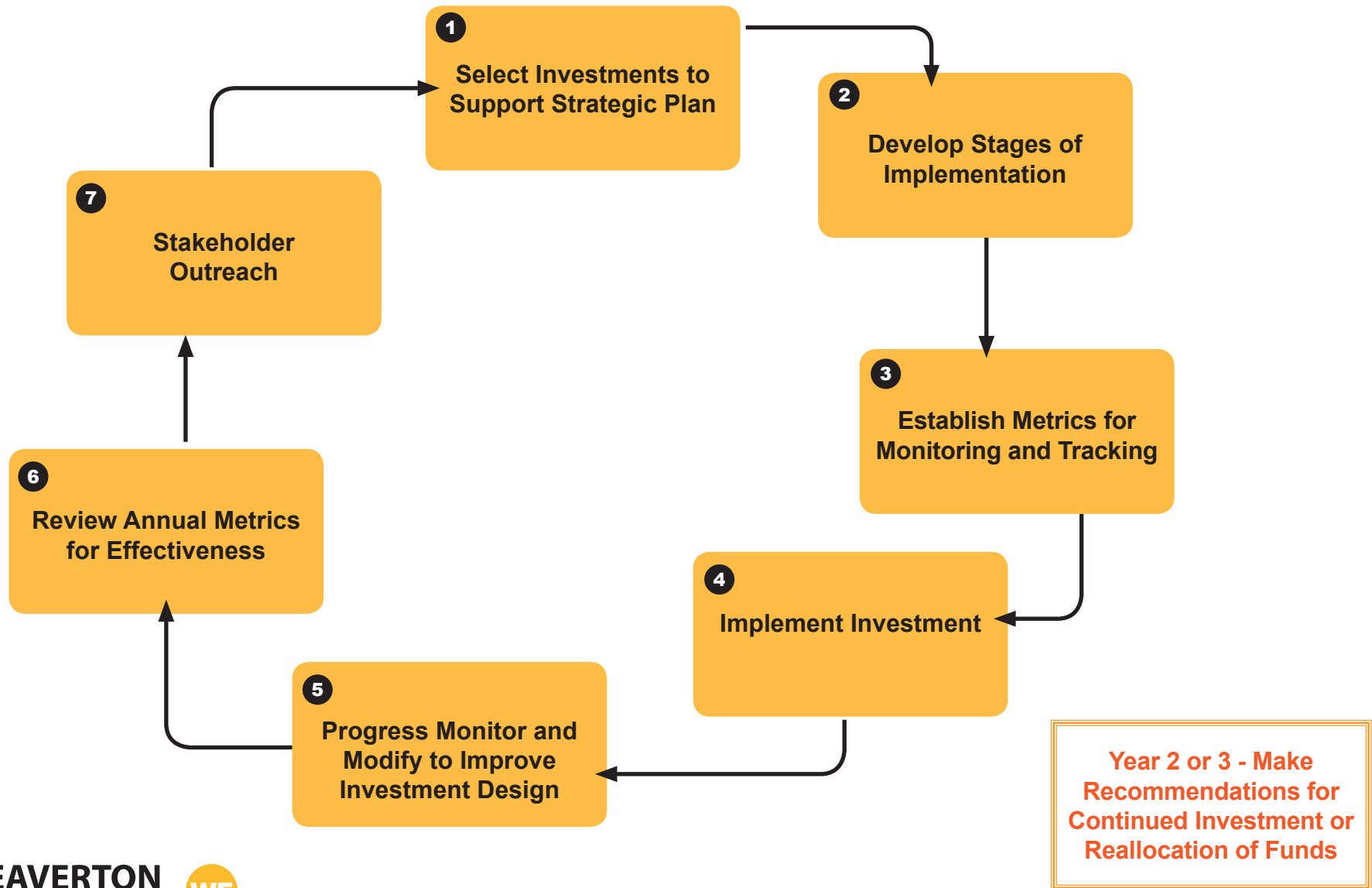
# Investment Priorities

## Summary of New Investments Added Annually

Investment Priorities	2014-2015	2015-2016	2016-17	Total	2017-18	2018-19	2019-20
Class Size	\$609,000	\$6.4M	\$4.2M	\$11.2M	\$6.0M	-	\$3.0M
Comprehensive Education	\$3.1M	\$1.0M	\$310,000	\$4.5M	\$500,000	-	\$2.0M
Provide additional instructional time	-	-	-	-	-	\$4.0M	-
Educator Effectiveness	-	\$260,000	\$318,000	\$570,000	\$4.5M	-	500,000
Standards Based Learning System	\$9.7M	\$6.9M	\$1.2M	\$17.8M	\$1.2M	-	\$1.2M
Bond Fund	\$770,000	\$600,000	\$600,000	\$2.0M	\$600,000	\$600,000	\$600,000
Future Ready Schools - General Fund	-	\$2.0M	\$1.4M	\$3.4M	\$2.7M	-	\$6.0M
Bond Fund	-	\$10.7M	\$4.0M	\$14.7M	\$4.0M	\$4.0M	\$4.0M
AVID General Fund	\$825,000	\$835,000	\$805,000	\$2.5M	\$1.0M	\$500,000	\$500,000
Nike Grant	-	\$331,000	\$336,000	\$667,000	(\$336,000)	-	-
Culturally Responsive Practices	\$1.3M	\$4.6M	\$942,000	\$6.7M	\$120,000	-	-
Learning Teams	\$175,000	\$150,000	-	\$325,000	\$325,000	-	-
Community Partnerships	-	-	\$80,000	\$80,000	\$100,000	-	-
<b>Total</b>	\$16.5M	\$33.8M	\$14.2M	\$66.4M	\$20.7M	\$9.1M	\$17.8M

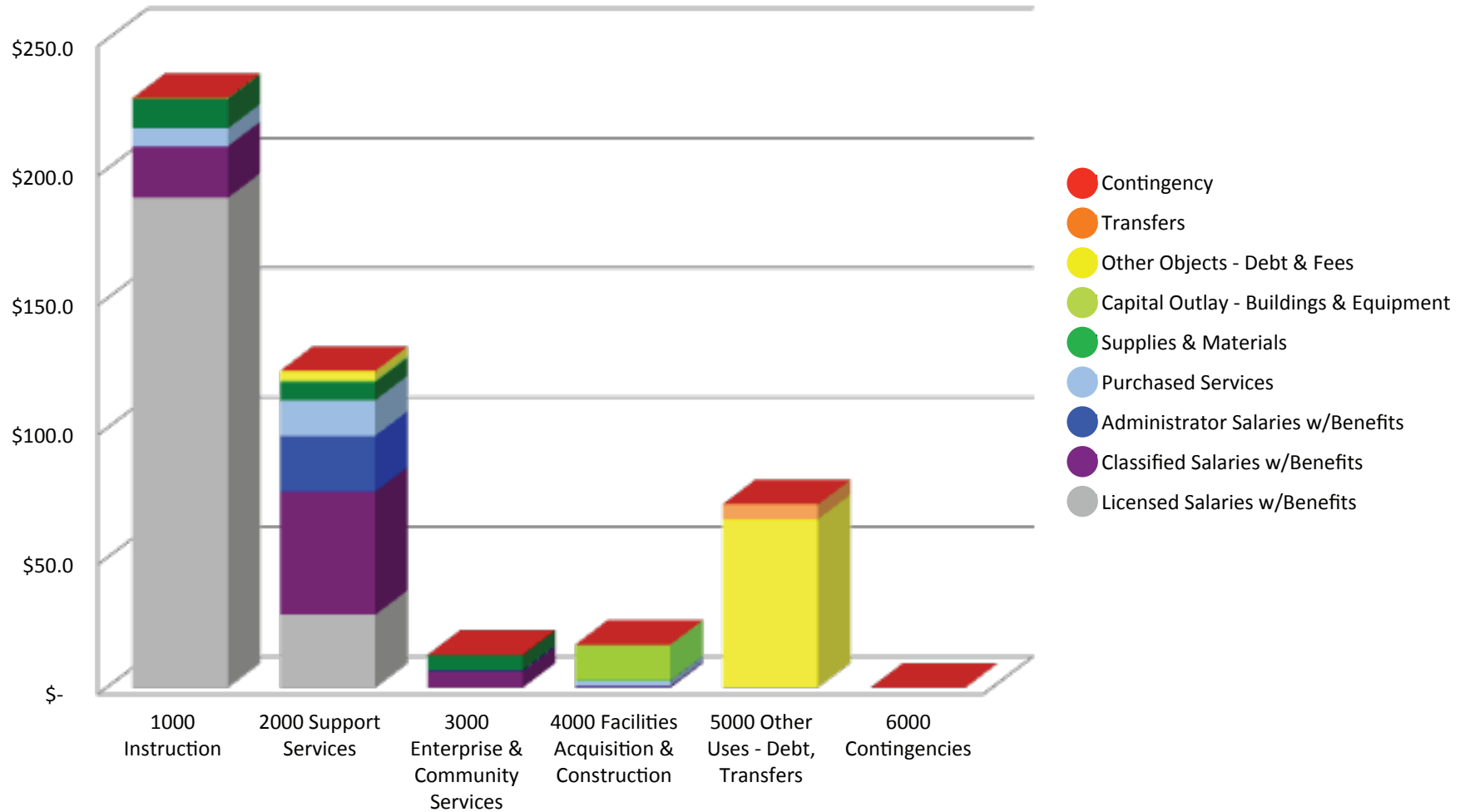
# Progress

Monitoring and tracking Beaverton School District progress by investing in strategic priorities will be a continuous improvement process.



# Appendices

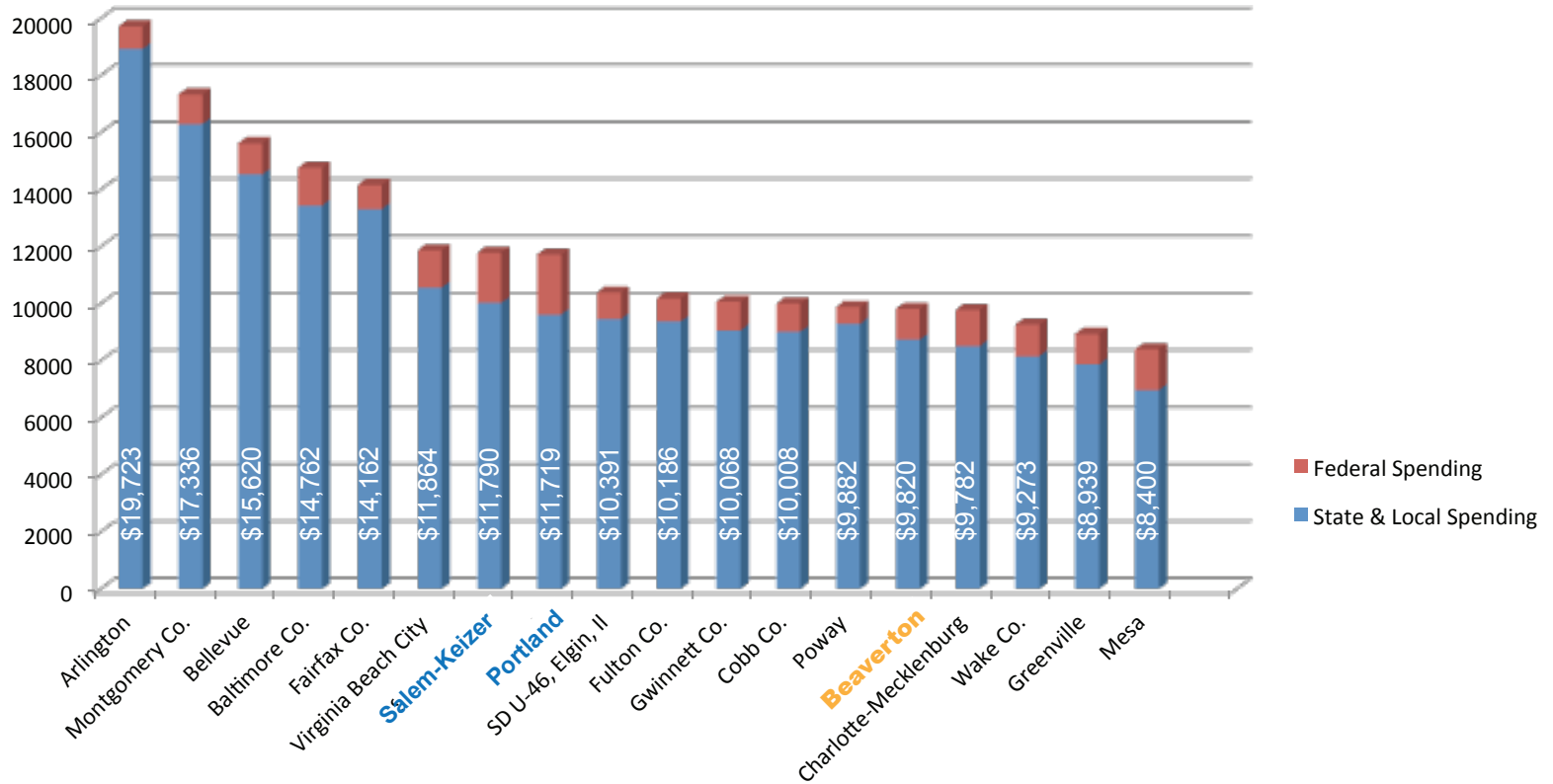
## Beaverton School District All Funds Expenditures 2013-14 Actuals (in millions)



# Appendices

## Comparison of Districts

### Total Expenditures Per Pupil 2013-14 - Large Districts

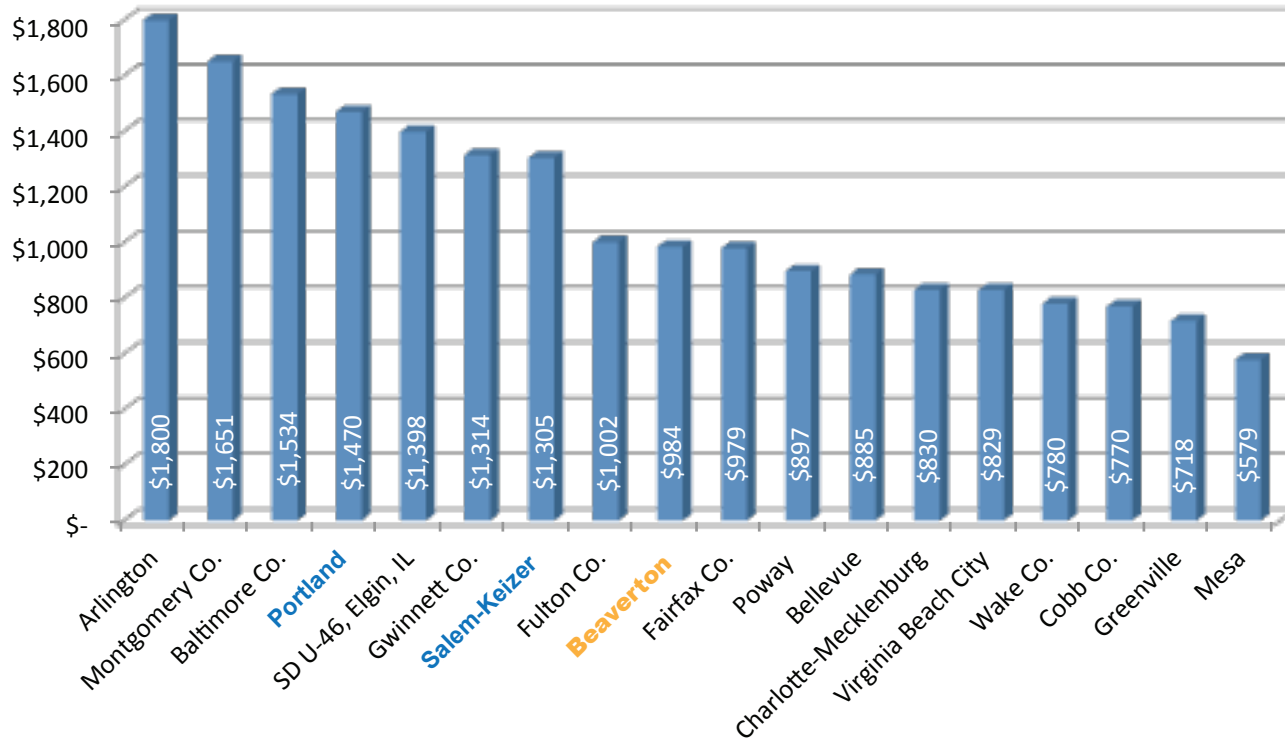


All information from National Center for Education Statistics	Arlington	Montgomery Co.	Bellevue	Baltimore Co.	Fairfax Co.	Virginia Beach City	Salem-Keizer	Portland	SD U-46 Elgin, IL	Fulton Co.	Gwinnett Co.	Cobb Co.	Poway	Beaverton	Charlotte-Mecklenburg	Wake Co.	Greenville	Mesa
	22K	149K	19K	107K	181K	70K	40K	47K	40K	94K	165K	108K	35K	40K	144K	151K	74K	108K
Total Expenditures (in \$ Millions)	\$351	\$2,221	\$169	\$1,380	\$2,180	\$733	\$376	\$510	\$389	\$843	\$1,483	\$947	\$273	\$335	\$1,094	\$1,112	\$541	\$490

# Appendices

## Comparison of Districts

### Administration Expenditures Per Pupil 2013-14



#### Administration Expenditures Per Pupil

**Administration:** Expenditures for the administration of schools and school districts. Includes expenditures for: the School Board, administration of Local Education Agencies, the office of the principal, full-time department chairpersons, graduation expenses, business services, Teaching & Learning, HR, and IT.

All information from National Center for Education Statistics	Arlington	Montgomery Co.	Baltimore Co.	Portland	SD U-46 Elgin, IL	Gwinnett Co.	Salem-Keizer	Fulton Co.	Beaverton	Fairfax Co.	Poway	Bellevue	Charlotte-Mecklenburg	Virginia Beach City	Wake Co.	Cobb Co.	Greenville	Mesa
	Enrollment	22K	149K	107K	47K	40K	165K	40K	94K	40K	181K	35K	19K	144K	70K	151K	108K	74K
% Administration	11%	11%	12%	13%	15%	14%	14%	11%	11%	8%	11%	10%	10%	8%	10%	9%	10%	8%

District Goal: All students will show continuous progress toward their personal learning goals, developed in collaboration with teachers and parents, and will be prepared for post-secondary education and career success.