

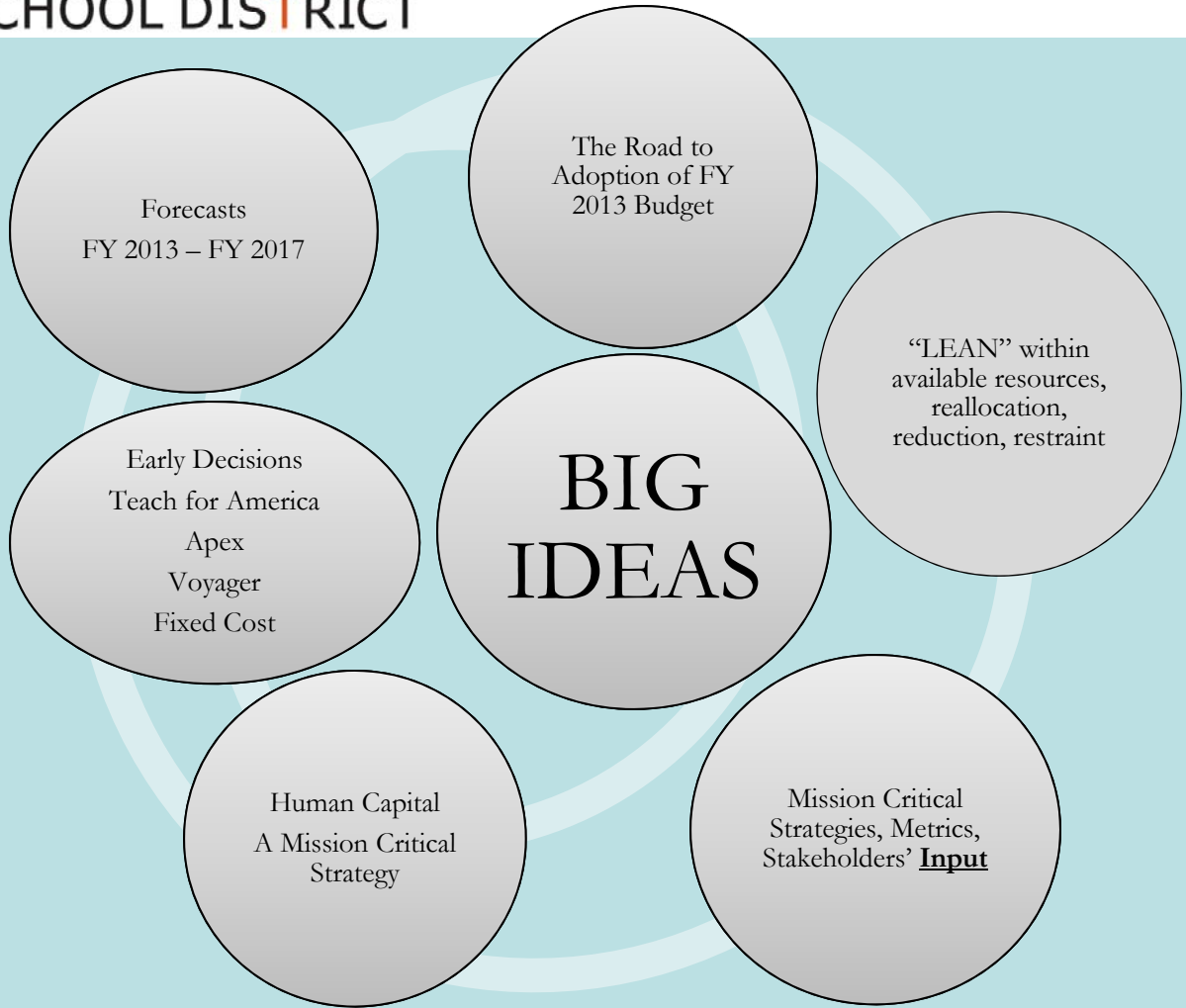
# **CHARLESTON ACHIEVING EXCELLENCE**

**Programs, Strategies & Budgets –  
Looking Forward  
FY2013 to FY2017**

# Budget 2013



**Allocate Resources  
to  
Mission Critical Strategies  
to  
Meet District Goals  
through  
Laser Focus on our Students  
=  
Charleston Achieving Excellence**



# District Financial Condition

A Delicate Balance



Resources

Needs

- Multiple Factors
- Degree Control
- Fiscal Year End 2011
- Balancing a Budget is Not a Magical Mystery Tour
- Five Year Forecast

# Focus on Fiscal Year 2013

## ➤ Projection and Priorities

**Budget Process and Assumptions – Ms. Shannon**

**Strategies, Priorities and Expenditures – Mr. Milburn**

**Human Resource Opportunities and Challenges – Mr. Briggman**

**Summary and Next Steps**

# Budget Calendar

## Key Dates

- January 9 – Vision 2016 Community Meeting with Board
- January 23 – Vision 2016 Community Meeting with Board
- February 1 – Enrollment projections finalized
- February 13 – Vision 2016 Community Meeting with Board
- February 27 – Vision 2016 Community Meeting with Board
- March 9 – School & department budgets turned in
- March – Continuing contracts issued for eligible teachers (tentative)
- April 6 – Annual & Induction contracts issued as allowed  
& necessary for allocated positions
- April 25 – Teacher contracts due from employees
- May 29 – 1<sup>st</sup> Reading of FY2013 Budget
- June 4 – Public Hearing on FY2013 Budget
- June 11 – 2<sup>nd</sup> Reading of FY2013 Budget

# Budget Assumptions

- ❖ These assumptions are subject to change as the budget development process moves forward and additional information is received
- No tax increases or Use of Fund Balance are included
- Revenue additions for property growth, Boeing plant and Tax Incremental Financings (TIFs) are included
- Cost of Living Adjustment & Step increases are included
- Expenditures impacted by Consumer Price Index (CPI) or contract escalators are included
- Expenditures impacted by Capital plans are included – Seismic schools return & replacement/renovated sites built
- Additional Key Strategic Initiatives are included
- Expenditures impacted by increased student enrollment are included

# 5-Year Plan – Key Strategic Initiatives

# Highly Qualified Staff

## Five Year Plan

3% Teachers = \$6.3M  
\*Step = \$4.0M  
3% Classified = \$1.2M  
3% Admin = \$0.7M

## Current Year

No COLA or Steps

## Requirements

Additional or Re-allocated  
Revenue

\*Teachers step twice,  
all others once.

- Implement Cost of Living and Step increase for Year One.
- Adjust for out going years based upon variables:
  - Salary Study – completed by June 2012, State decision on the Minimum Salary Schedule, State and Local decision on Pay for Performance, etc.

**NEW COSTS**

**Year One Cost = \$12.2M**  
**Year Two Cost = \$12.5M**  
**Year Three Cost = \$12.8M**  
**Year Four Cost = \$13.1M**  
**Year Five Cost = \$13.5M**

# Highly Qualified Staff

## HR Opportunities and Challenges for 2013

- VIF

	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012
# of VIF	62	57	57	30	34	20	18	10

- Projected Teacher TERI Exits – Next 5 years

	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
# of Teachers	8	12	16	26	19

- Retired teachers on staff

	2009-2010	2010-2011	2011-2012
# of Teachers	108	107	75

- Total number of teachers

	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012
# of Teachers	3,266	3,328	3,419	3,346	3,216	3,349	3,179

# Highly Qualified Staff

HR Opportunities and Challenges for 2013 *continued*

## *Rigorous Interview Process*

- allows principals access to a candidate pool that has been
  - pre-screened
  - participated in interview event
    - ❖ Lesson plan & model lesson
    - ❖ Interview and writing prompt response
  - identified by a group of administrators as highly qualified
- Piloting with surplus content teacher candidates
- Rigorous interview process will create a hiring pool

# Highly Qualified Staff

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## HR Updates

- Candidate Screening Tool – RFP January 2012
- Salary Study – Fox Lawson & Associates conducting a salary study – Beginning in January 2012
- Applitrack Application – March 2012
- Teach for America
  - will provide 30 teachers who have been selected through a challenging national interview process
  - Cost to District is \$120,000 per year beginning in fiscal year 2013. (For FY 2013 and FY 2014)

## Elementary Literacy Pathways

2009-2010	2010-2011	2011-2012	2012-2013 Proposed
Began Third Grade Academy (TGA) in 12 schools	Continue Third Grade Academies	Continue FGA and TGA	Continue FGA
	+First Grade Academy (FGA) in all elementary schools	+Kindergarten Interventions (interventions done by K teachers with no additional funding)	+Add interventionists to support literacy intervention in: K, 2 <sup>nd</sup> and 3 <sup>rd</sup>
		+Second grade interventions (on a limited basis with no additional funding)	-Replace current TGA with universal 3GA

# Elementary Literacy Pathways

## Five Year Plan

Extend Literacy Intervention  
and Master Teachers

## FY2013

Impact 2,300 students in 45 schools

## FY2014 through FY2017

Impact 2,500-2,700 students in 45  
schools

## Requirements

- Additional support staff
- Additional materials
- Additional Master Teachers
- Additional Teacher Assts.

- Support Theory to Fifth Grade
  - FY2012-2013: Third Grade Academy (2011-2012) replaced by universal Third Grade Academy
  - 1GA, 2GA, 3GA, 4GA, 5GA, 6GA

## NEW COSTS

**Current Cost = \$4.5M**

**Year One Cost = \$3.5M**

**Year Two Cost = \$2.9M**

**Year Three Cost = \$0.45M**

**Year Four Cost = \$0.46M**

**Year Five Cost = \$0.47M**

# Elementary Literacy Pathways

## HR Opportunities and Challenges for 2013

- Recruiting early childhood teachers with literacy credentials
  - for core content classrooms
  - Literacy Pathways classrooms
- Rigorous interview process first event scheduled for February 20, 2012
- Early Childhood and Elementary teachers with enhanced reading credentials will be invited to participate

## Choice Overview

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- **Voluntary choice model** that meets the diverse, ever-changing needs of parents and students.
- **32 Choice Options** – CW Magnets (9), Constituent District Magnets (6), Partial Magnets (9), Charter Schools (8)
- Opportunity to provide **better equity** across Charleston County District with regards to our choice programs.

## Choice – Other Considerations

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- **Consistent** programmatic allocations across types of schools
- **Technology** updates – on-line application, registration, and address verification
- **Magnet Transportation**

# Choice

## I. North Charleston Creative Arts Elementary

### Five Year Plan

- Grow into a full school operations (K – 5<sup>th</sup> grade)
- FY2013-2014 Move into Berry Bldg (CPA moves into new renovated building)
- FY2015-2016 Enrollment projected at 450 (K to 5<sup>th</sup>)

### Requirements

- Additional staff
- Additional training
- Additional equipment
- Additional materials

**Current Year** – grades Kindergarten and First with enrollment of 100

**Future** – Considering adding CD

**NEW COSTS\***

**Current Cost = \$1.0M**  
**Year One Cost = \$0.5M**  
**Year Two Cost = \$0.64M**  
**Year Three Cost = \$0.18M**  
**Year Four Cost = \$0.18M**  
**Year Five Cost = \$0.02M**

\*Does not include cost of campus construction or operational costs of campus (utilities, maintenance, etc.)

# Choice

## II. Montessori

### Five Year Plan

- Grow Montessori with Primary to Middle School in each zone
  - D2, D3, D4, D10, D20, Southwest zone

### Requirements

- Additional staff
- Additional training
- Additional materials
- Additional facilities

**Current Year** – Montessori at Mitchell (D20), Community Montessori (D10), East Cooper Montessori (D2) and Hursey (D4)

### NEW COSTS

**Current Cost = \$x.xM**

**Year One Cost = \$0.73M**

**Year Two Cost = \$0.53M**

**Year Three Cost = \$1.2M**

**Year Four Cost = \$0.91M**

**Year Five Cost = \$0.77M**

# Choice

## HR Opportunities and Challenges for 2013

- Recruiting Montessori trained teachers
- Potential Montessori training of current teacher group
  - Lander University is the only SC University
- Tentative recruiting event: February 10-11
- National ads have been utilized

# Early Learning

## Five Year Plan

- Continue expansion of Pre-K (4) services throughout CCSD.
- Goal is to be serving 100% of all high need four year olds and 55% of all remaining four year olds.
  - Expand ten (10) classrooms per year.

## Requirements

- Additional teachers
- Additional teacher assts.
- Additional training
- Additional mobile classrooms or facilities
- Additional equipment

**Current Year** – serving 1,764 four year olds in our CD program at 45 schools.\*

This represents 67% of all four year olds.

### NEW COSTS\*\*

**Current Cost = \$8.3M\***

**Year One Cost = \$1.1M**

**Year Two Cost = \$1.15M**

**Year Three Cost = \$1.2M**

**Year Four Cost = \$1.25M**

**Year Five Cost = \$1.3M**

\*Does not include Headstart

\*\*Need to add Capital costs

# Early Learning

## HR Opportunities and Challenges for 2013

- Focus recruiting efforts on candidates who have had specialized training in early literacy
- Candidates will participate in the rigorous interview events in spring 2012

## Extended Learning Time In the Innovation Zone Learning Community

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- If we're serious about closing achievement gaps, if we're serious about turning around underperforming schools, we can't just keep doing business as usual (Arne Duncan, U.S. Secretary Education).
- 6/11 schools that are at-risk, and 5/12 that are below average are in the IZLC.
- Highest percentage of learning loss occurs during the summer months for our high poverty students.
- Extending learning time will allow us to individualize learning time and instruction based on student needs.
- Use time to build a school culture of high expectations and mutual accountability
- Extended time is not a resource, but a strategy.
- Extend the school year by 20 days.

Figure 2. Accumulated Effects of Summer Learning Loss



Source: Center for Summer Learning, Johns Hopkins University.

# Innovation Learning Community

## “Time Well Spent”

### Five Year Plan

Increase learning time for students through extended year and extended day at Innovation Zone schools.

### Requirements

- Additional personnel costs in time at all levels (contract amendment)
- Additional training
- Additional transportation

### NEW COSTS\*

**Current Cost = \$0.0M**

**Year One Cost**

**Extended Year = \$3.6M**

**Extended Day = \$3.5M**

**Year Two Cost = \$0.2M**

**Year Three Cost = \$0.25M**

**Year Four Cost = \$0.3M**

**Year Five Cost = \$0.35M**

**\*Plus transportation**

# Innovation Learning Community

## “Time Well Spent”

### HR Opportunities and Challenges for 2013

- Teacher contract modification (days and hours per day)
- Recruitment and retention issues due to extended work schedule
  - Potential reassignments
- A need for a specific salary schedule for the IZLC
- Salary budgeted for classified staff will need to be increased to accommodate the extended work schedules and possible overtime

## 2012 Task Force Facts

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- Established August 2011
- Team included teachers, counselors, principals, administrators, community partners
- Established three committees: 1) Elementary Instruction & Support, 2) Continuum of Care, 3) Secondary Instruction & Support
- Data based decision making: Local, State, National Data and Site Visits
- *Innovative, Collaborative, Realistic!*

# Task Force Recommendations

- Mandated district wide implementation of PBIS (Positive Behavioral Interventions and Supports) to include training and monitoring with fidelity.
- Blending of Liberty Hill Academy and Daniel Jenkins Creative Learning Center for the 2012-13 school year (to include a review of the names).
- Expand secondary alternatives to include: Alternative Night School, Virtual Learning, Academic Interventions for over aged middle and high school students.
- Phased implementation of school based Comprehensive Community Service Centers. Year 1: North Zone, for each district zone. Center will be staffed with a social worker and to collaborate with CYDC, Mental Health, MUSC, and other community agencies.
- Expand grade enrollment for the alternative setting (4<sup>th</sup>-12<sup>th</sup> grade).
- Full time guidance counselors in all schools (currently there are some part-time counselors based on student enrollment). Examine Year 2

## Benefits of AETF Proposal for 2012-13

- ❖ **PRIMARY FOCUS-** Proactive, research based, school based, student focused interventions.
- ❖ Increase alternative academic interventions for secondary students.
- ❖ Increase in community based collaborations and supports within the schools.
- ❖ Provides alternative options for elementary students
- ❖ Increases the number of K – 12 alternative seats to 300 between LHA & DJCLC.
- ❖ Establish a greater focus on academic interventions and rehabilitation with behavior.
- ❖ Closing the Achievement Gap at the following Alternative Programs:

Twilight	Palmetto
Daniel Jenkins	Windwood
Liberty Hill	IAES
Detention Center	Clark

# Alternative Education

## Five Year Plan

- Proposed changes over next two years: evaluate data, review, revise and improve in the outgoing years – FY2014-2015 through 2016-2017
- Universal implementation of PBIS, a merger of Liberty Hill and Daniel Jenkins, full-time guidance in every school, adding additional educational support and one community service center in each zone

## Requirements

- Additional staffing
- Additional training
- Additional facilities (TBD)

## Current Cost

PBIS = \$x.xM  
Counselors = \$x.xM  
Liberty Hill = \$2.0M  
Daniel Jenkins = \$2.0M

## NEW COSTS

### Year One Cost -

Merger = \$0.5M  
PBIS = \$1.0M  
Center = \$0.27M  
Admin staff = \$0.11M

**Year Two Cost = \$1.1M**

**Year Three, Four & Five  
Cost = TBD**

# Alternative Education

## HR Opportunities and Challenges for 2013

- Focus on identifying staff with PBIS expertise to allow for school based leads
- Comprehensive Community Health Centers
  - 4 Social Workers
- Full time Guidance Counselors at every school (FY 2014)
- Reassignments of staff based on the redesign of Liberty Hill & Daniel Jenkins

# Career & Technical Education

## Five Year Plan

- Multi-faceted approach
- First – phase in & implement STEM programs at all middle & high schools not currently offering Project Lead The Way
- Second – add Work-Based Learning Coordinators to cover entire District CTE needs
- Third – phase in computer science requirements at all middle schools
- Fourth – increase funding for operating expenses (consumables and equipment)
- Fifth – use Capital Program to replace equipment
- Sixth – include all new operating expenses for Low Country Tech (Jan 2013) and Wando Career and Technology Academy (Aug. 2014)

# Career & Technical Education

## Requirements

- Additional staffing
- Additional technology
- Additional facilities
- Additional training

**Current Cost of CTE  
Programming = \$x.xM**

## NEW COSTS

### Year One Cost -

HS CTE = \$0.5M

STEM = \$1.35M

Computer Science MS = \$1.0M

WBL Coordinator = \$0.4M

Operating = \$0.03M

Low Country Tech = \$x.xM

### Year Two Cost –

STEM = \$0.86M

Low Country Tech (full year) = \$x.xM

Wando CTA = \$x.xM

**Year Three Cost = \$x.xM**

**Year Four Cost = \$x.xM**

**Year Five Cost = \$x.xM**

# Career & Technical Education

## HR Opportunities and Challenges for 2013

- Unique certification requirements based on program design may cause recruitment issues
- Teacher salary structure may also impact recruitment efforts
  - Example: Health Care Technology teacher, difficult to recruit a nurse due to salary difference
- Monitor progress of Career & Technical Education teachers in alternative certification programs (for example = DIRECT)

# Other

## English Language Learners

Current Cost = \$2.5M

Teachers = 38

## Support Staff -

Build and rebuild  
capacity for strategic  
initiatives & increased  
square footage

## Service Centers -

Cost reductions and re-  
allocation – e.g., small school  
formulas

## Five Year Plan

**NEW COSTS**

Year One Cost = \$x.xM

Year Two Cost = \$x.xM

Year Three Cost = \$x.xM

Year Four Cost = \$x.xM

Year Five Cost = \$x.xM

# Other

## HR Opportunities and Challenges for 2013

- Plan allows for schools to hire staff that are bilingual
- Challenges include assessing applicants skills

# Revenues & Expenditures Looking Ahead

## Revenue Projections

	FY2011 Audited Revenue	FY2012 Original Budget	FY2013 Projected Budget	FY2014 Projected Budget	FY2015 Projected Budget	FY2016 Projected Budget	FY2017 Projected Budget
<b>LOCAL</b>	\$189,427,161	\$184,088,402	\$188,660,346	\$195,343,329	\$200,978,293	\$204,847,635	\$215,220,363
<b>STATE</b>	128,629,444	137,670,755	139,059,722	140,476,468	141,921,550	143,395,533	144,898,995
<b>FEDERAL</b>	290,988	281,292	281,292	281,292	281,292	281,292	281,292
<b>TRANSFER</b>	3,891,330	6,567,534	2,317,534	2,317,534	2,317,534	2,317,534	2,317,534
<b>FUND BALANCE</b>	0	5,700,000	0	0	0	0	0
<b>GRAND TOTAL</b>	<b>\$322,238,923</b>	<b>\$334,307,983</b>	<b>\$330,318,894</b>	<b>\$338,418,623</b>	<b>\$345,498,669</b>	<b>\$350,841,993</b>	<b>\$362,718,185</b>

**Expenditure Projections**  
 (Based upon current programming, staff and inflationary increases)

	FY2012 Amended Budget	FY2013 Projected Budget	FY2014 Projected Budget	FY2015 Projected Budget	FY2016 Projected Budget	FY2017 Projected Budget
<b>SALARIES</b>	\$181,396,085	\$181,396,085	\$181,396,085	\$181,396,085	\$181,396,085	\$181,396,085
<b>FRINGE</b>	58,042,034	58,776,753	59,544,534	60,346,866	61,185,302	62,061,468
<b>PUR SRVS</b>	44,575,538	47,012,286	48,088,314	49,228,598	50,318,588	51,604,256
<b>SUPPLIES</b>	18,622,476	18,982,247	19,352,847	19,734,604	20,127,853	20,532,942
<b>EQUIP</b>	6,300	6,300	6,300	6,300	6,300	6,300
<b>OTHER</b>	3,192,220	3,192,220	3,192,220	3,192,220	3,192,220	3,192,220
<b>TRANSFERS</b>	27,573,330	28,351,328	29,152,666	29,978,045	30,828,184	31,703,828
<b>RESERVES</b>	900,000	900,000	900,000	900,000	900,000	900,000
<b>GRAND TOTAL</b>	<b>\$334,307,983</b>	<b>\$338,617,219</b>	<b>\$341,632,967</b>	<b>\$344,782,718</b>	<b>\$347,954,533</b>	<b>\$351,397,099</b>

## Additional Strategies Projections

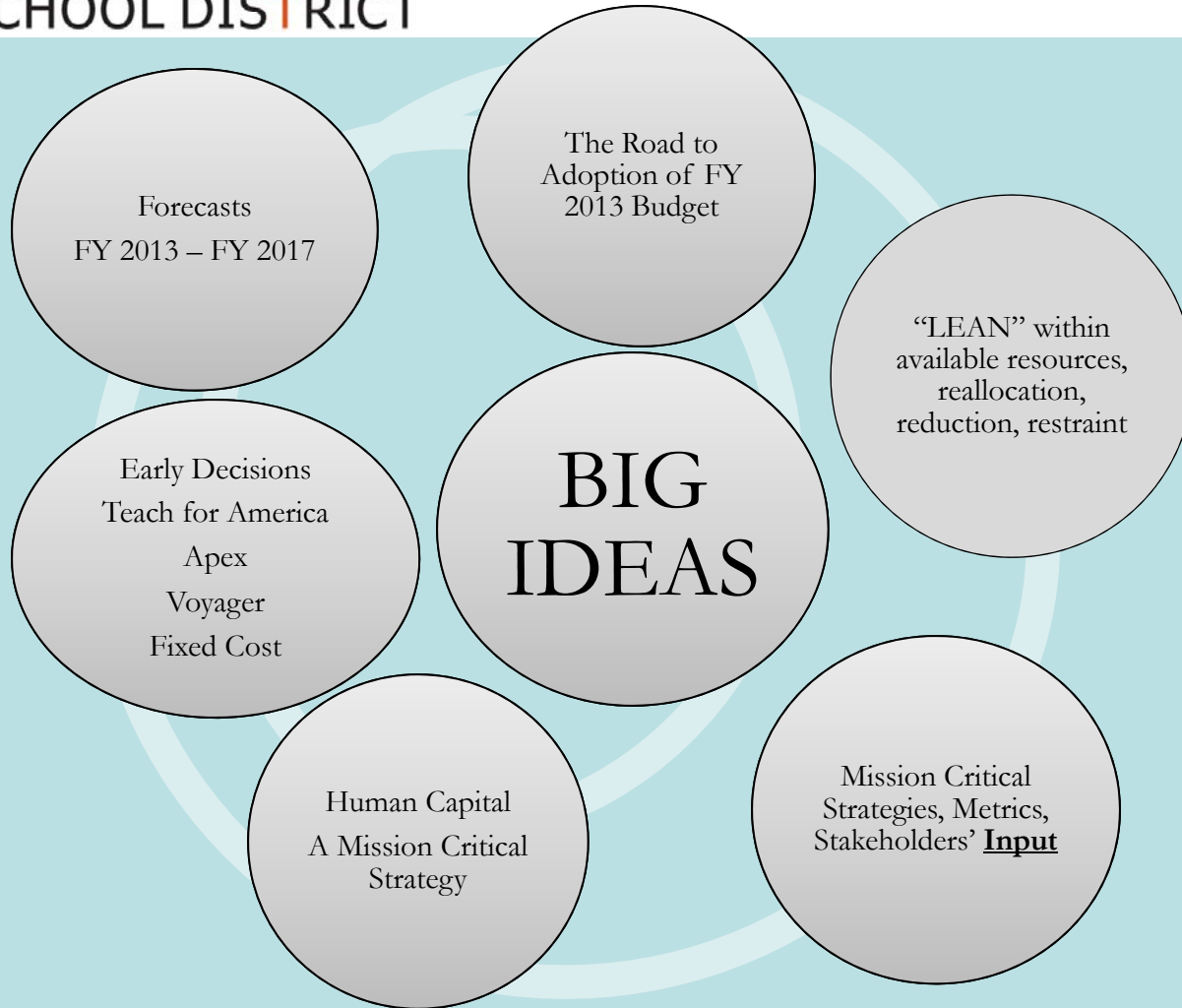
	FY2012 Amended Budget	FY2013 Projected Budget	FY2014 Projected Budget	FY2015 Projected Budget	FY2016 Projected Budget	FY2017 Projected Budget
<b>HIGHLY QUALIFIED</b>		\$12,200,000	\$24,700,000	\$37,500,000	\$50,600,000	\$64,100,000
<b>LITERACY ACADEMIES</b>		3,500,000	6,400,000	6,850,000	7,310,000	7,780,000
<b>CHOICE – NCCAES</b>		500,000	1,140,000	1,320,000	1,500,000	1,520,000
<b>CHOICE - MONTESSORI</b>		730,000	1,460,000	2,660,000	3,570,000	4,340,000
<b>EARLY LEARNING</b>		1,100,000	2,250,000	3,450,000	4,700,000	6,000,000
<b>IZLC – TIME WELL SPENT</b>		7,100,000	7,300,000	7,550,000	7,850,000	8,200,000
<b>ALTERNATIVE EDUCATION</b>		1,880,000	2,980,000	2,980,000	2,980,000	2,980,000

## Additional Strategies Projections

	FY2012 Amended Budget	FY2013 Projected Budget	FY2014 Projected Budget	FY2015 Projected Budget	FY2016 Projected Budget	FY2017 Projected Budget
CTE		\$4,780,000	\$7,140,000	\$7,140,000	\$7,140,000	\$7,140,000
SEISMIC SCHOOL RETURN			500,000	500,000	500,000	500,000
INCREASED ENROLLMENT		3,732,935	7,465,870	11,198,805	14,931,740	18,664,675
ADDITIONAL STRATEGIES		\$35,522,935	\$61,335,870	\$81,148,805	\$101,081,740	\$121,224,675
<b>GRAND TOTAL</b>		<b>\$374,140,154</b>	<b>\$402,968,837</b>	<b>\$425,931,523</b>	<b>\$449,036,273</b>	<b>\$472,621,774</b>

## Revenue & Expenditure Projections

	FY2012 Amended Budget	FY2013 Projected Budget	FY2014 Projected Budget	FY2015 Projected Budget	FY2016 Projected Budget	FY2017 Projected Budget
<b>Estimated Revenues</b>	\$334,307,983	\$330,318,894	\$338,418,623	\$345,498,669	\$350,841,993	\$362,718,185
<b>Estimated Expenditures</b>	334,307,983	338,617,219	341,632,967	344,782,718	347,954,533	351,397,099
<b>Additional Strategies</b>		35,522,935	61,335,870	81,148,805	101,081,740	121,224,675
<b>Variance</b>	\$0	(\$43,821,260)	(\$64,550,214)	(\$80,432,854)	(\$98,194,280)	(\$109,903,589)
<b>Mills to balance</b>		24.35	35.86	44.68	54.55	61.06
<b>Audited undesignated Fund Balance 6/30/2011</b>	\$29,266,687					



## Blending Schools/Programs

### Blending Schools/Programs

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School/Program	•
Human Resources	•
Facilities	•
Transportation	•
Professional Development	•
Educational Outcomes	•

**QUESTIONS??**