



REVISED MULTIYEAR FINANCE PLAN

POLICY ISSUE/SITUATION

The Superintendent's recommendation for the District's Multiyear Finance Plan for 2017-2022 has been revised and is presented for School Board approval.

RECOMMENDATION:

BE IT RESOLVED it is recommended that the School Board approve the following Multiyear Finance Plan for 2017-2022.

District Goal: WE empower all students to achieve post-high school success.

The Beaverton School District recognizes the diversity and worth of all individuals and groups. It is the policy of the Beaverton School District that there will be no discrimination or harassment of individuals or groups based on race, color, religion, gender, sexual orientation, gender identity, gender expression, national origin, marital status, age, veterans' status, genetic information or disability in any educational programs, activities or employment.



2017-2018 Communication Plan

Multiyear Finance Plan FY 2017-2022

	Steps in the Process	SB/BC	Staff	Parents/Community	Students
June 2017	Multiyear Finance Team reviews and prepares for coming year; Work Groups organized; draft communication plan				
July	Work Groups formed; finalize com. plan				
August	Aug. 28 Budget Co. vacancies and application process discussed at School Board Meeting; Work Groups meet	Claire discusses at SB Meeting; send to BC	- Cabinet 8.15.17 - T & L Wed. mtg. - Nuts & Bolts 8.17.17	BSD Briefs Social Media Press Release	
September	Budget Co. vacancies advertised; Work Groups meet	Send press release to SB/BC; SB Update	CCI staff	BSD Briefs Social Media Press Release	Social Media BSAC monthly meeting
October	Oct. 10- Discuss Multiyear Finance Plan at SB Work Session; interview Budget Co. applicants	Claire presents at SB Work Session; SB Update	Staff Talk Princ. mtgs.	BSD Briefs Social Media Press Release	Social Media; BSAC monthly meeting; share with HS newspaper editors
November	Public survey open Nov. 11 – 28 Nov. 27- Listening & Learning Session Nov. 13- appoint Budget Co. Members to fill vacancies; orient new BC members	Send press release to SB/BC	Staff Talk Princ. mtgs.	BSD Briefs Social Media Press Release	Social Media; BSAC monthly meeting; share with HS newspaper editors
December	MYFT Review survey results		Staff Talk Princ. mtgs.	BSD Briefs Social Media	Social Media; BSAC monthly meeting; share with HS newspaper editors
Jan. 2018	Internal Budget Team: Jan. 5, Jan. 19, Jan. 24, Jan 31	Send press release to SB/BC	Staff Talk Princ. mtgs.	BSD Briefs Social Media Press Release	Social Media; BSAC monthly meeting; share with HS newspaper editors
February	Feb. 12- Listening & Learning Session; outreach to diverse populations	Send press release	Staff Talk Princ. mtgs.	Press Release Social Media Work w/ Multiling.Dept.	BSAC monthly meeting
	Blue shaded months = Multiyear Finance Plan Yellow shaded months= Budget Process				

	Steps in the process	SB/BC	Staff	Parents/Community	Students
March 2018	March 5- Listening & Learning Session; outreach to diverse populations Proposed Budget Preparation by BO		Staff Talk Princ. mtgs.	Process BSD Briefs Press Release Social Media Work with Multilingual Dept.	
April	April 23- Budget Committee Meeting-elect Budget Co. officers; Proposed Budget; deliver Budget Message; public testimony; Internal Budget Team presentation	Send Proposed Budget	Staff Talk Princ. mtgs.	BSD Briefs Social Media Press Release	Social Media BSAC monthly meeting; share with HS newspaper editors
May	May 7- Budget Committee Meeting-District presents information in response to questions, public testimony and Budget Co. discussion May 21- Budget Committee Meeting-Approval of Budget	Claire presents with staff as needed	Staff Talk Princ. mtgs.	BSD Briefs Social Media Press Release	Social Media BSAC monthly meeting; share with HS newspaper editors
June	June 18- Budget Co. Hearing SB adopts Budget and Tax levies for 2017-2018	SB Meeting	Staff Talk	BSD Briefs Social Media Press Release	Social Media BSAC monthly meeting; share with HS newspaper editors
Blue shaded months = Multiyear Finance Plan Yellow shaded months = Budget Process <i>Updated 6.21.17</i>					

Key Messages about Multiyear Finance Plan during 2017-2018 FY 2018-2019:

- Why Beaverton is engaged in a Multiyear Finance Plan
- PERS- impact in 2017 and beyond
- Bond Measure- \$680 million bond measure approved in May 2014 for an eight-year build program.
- Local Option Levy renewal- expected May 2018
- Legislative short session-

Beaverton School District Multiyear Finance Plan

2017 - 2022



Introduction

What is Multiyear Finance Plan?

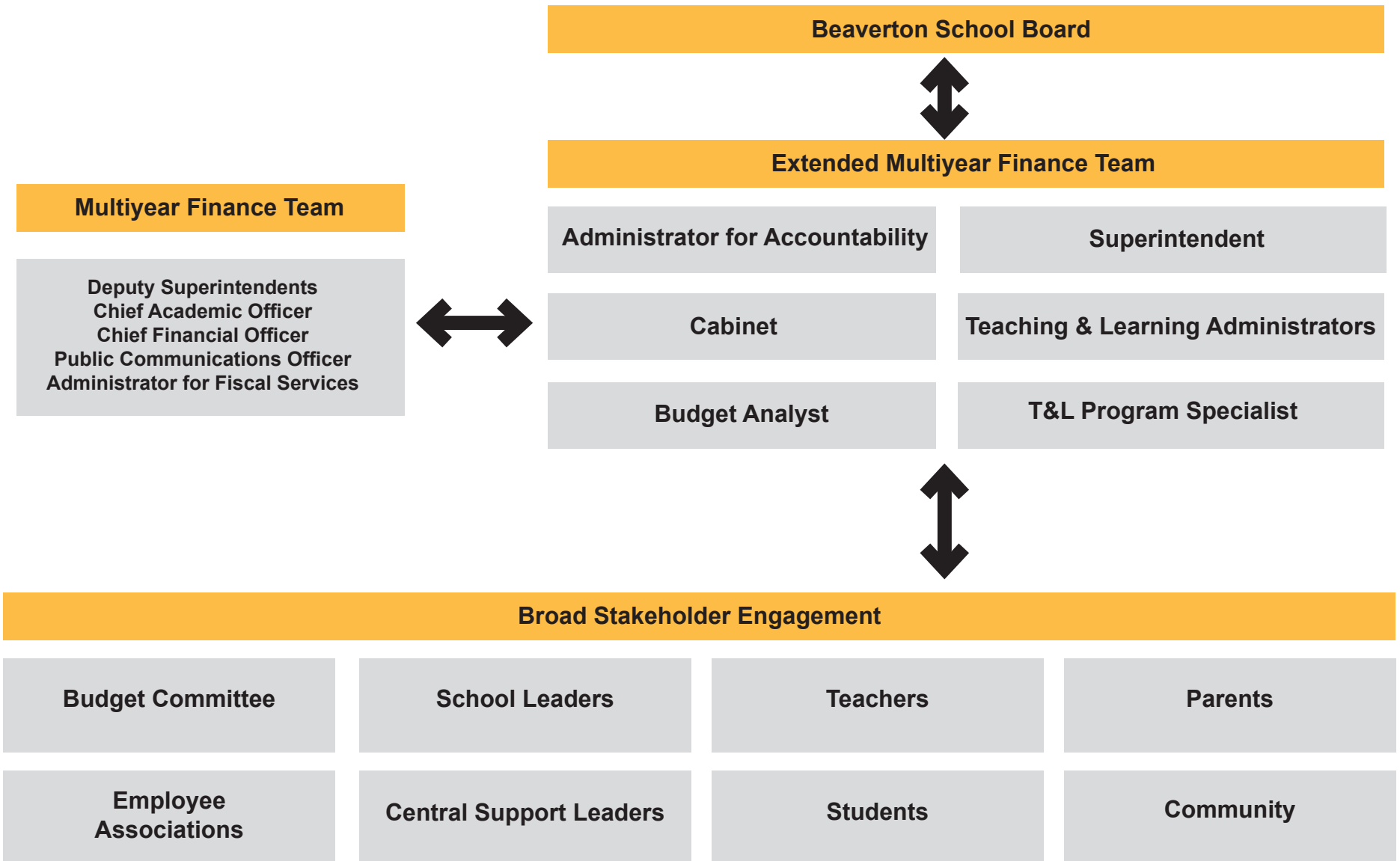
What It Is				What It Is Not
A three to five year financial plan outlining/detailing investments needed to meet the District’s strategic plan. Also identifies the source of funds to make the investments possible.	✓	Timeframe	✗	An Annual Budget
Targeted investments are aligned to the District goal and Pillars of Learning and estimates the cost of implementing the priorities over time.	✓	Link to Strategic Priorities	✗	Current Service Level roll-up based on historical trends without clear ties to strategic plan
Evaluation of program effectiveness is central to the decision-making process to deliver on the District’s strategic investments	✓	Program Effectiveness & Return on Investment	✗	Not connected to program evaluation or investment effectiveness
Financial Plan is regularly updated to reflect changes in revenue, student enrollment and program effectiveness	✓	Responsiveness to Changing Circumstances	✗	Static
Includes input from a broad set of stakeholders	✓	Stakeholder Engagement	✗	Created based on input from a small group

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 clear and transparent and we will seek continuous improvement.



Plan and Prepare



Set Instructional Priorities



Pay for Priorities



Implement Plan



Ensure Stability

	Audience	Multiyear Financial Plan Process JUNE - DECEMBER	Annual Budget Process JANUARY - JUNE
Summary Communication Plan Key Input Groups & Formats	School Board	October Work Session	Budget Process
	Multiyear Finance Team	Meeting 1x per month with Teaching & Learning Leaders and Cabinet	Internal Budget Process
	Principals	Principal meetings November & December	Principals Meetings February & March
	Staff, Parents, Community, Budget Committee	November - Multiyear Listening & Learning Sessions - Survey in November	January & February Listening & Learning Sessions
	Students	Survey in November	Focus groups w/ Board, Supt and Cabinet members, Beaverton Student Advisory Council (BSAC)

Future Revenue Impacts

May 2018 Election Results Impacts Future Local Revenue

Local Option Levy Renewal

Beaverton School District
Impact for 2018-19 through
2022-23

Approximately \$32 million
per year

2018-19 State Revenue

SSF Funding Level
\$8.2 Billion

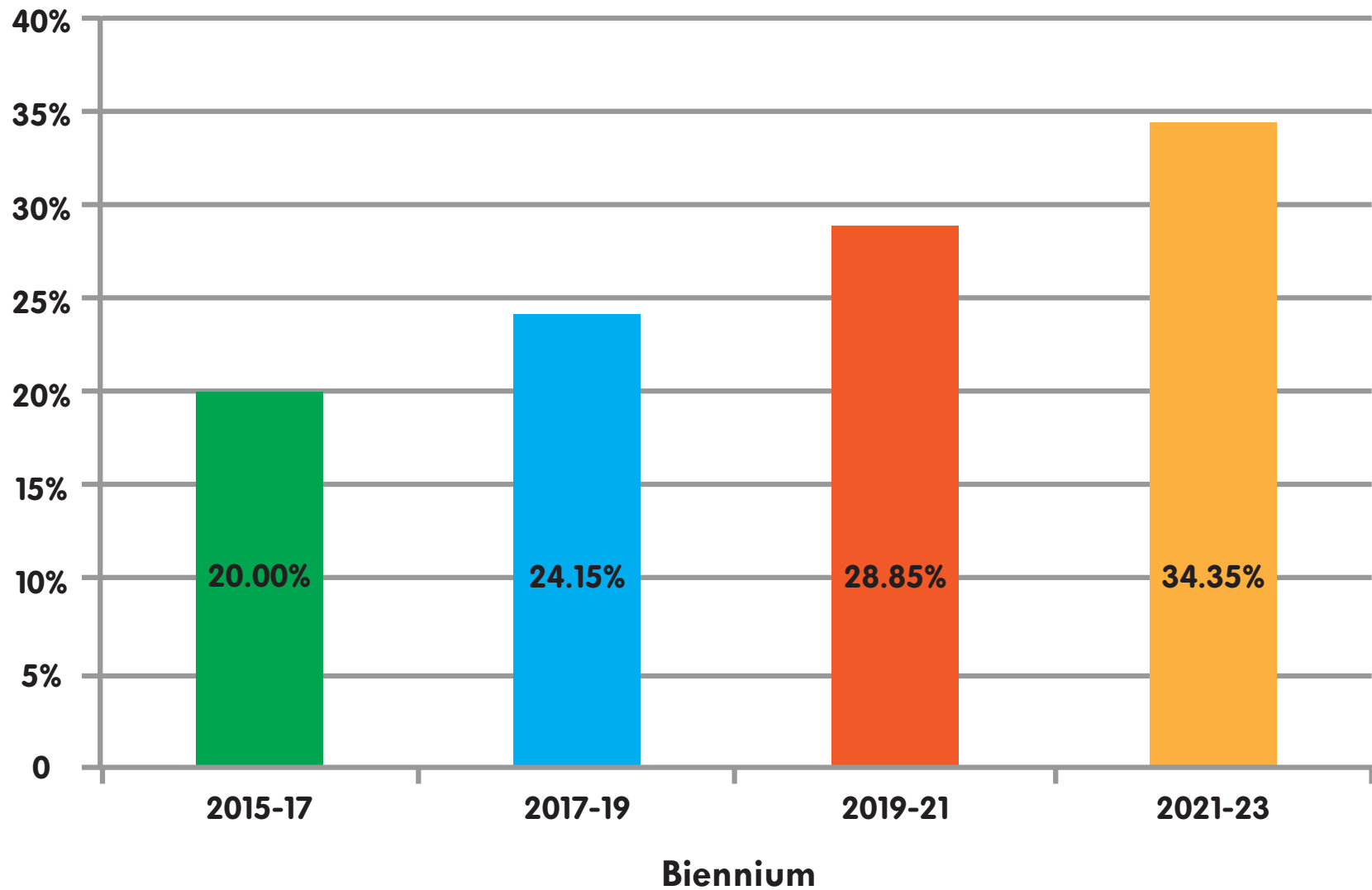
Measure 98
Career Technical Education
(CTE) & Increase Graduation
Rates
\$5.7 Million

Measure 99
Outdoor School
\$TBD by OSU Extension

Future Expenditure Impact

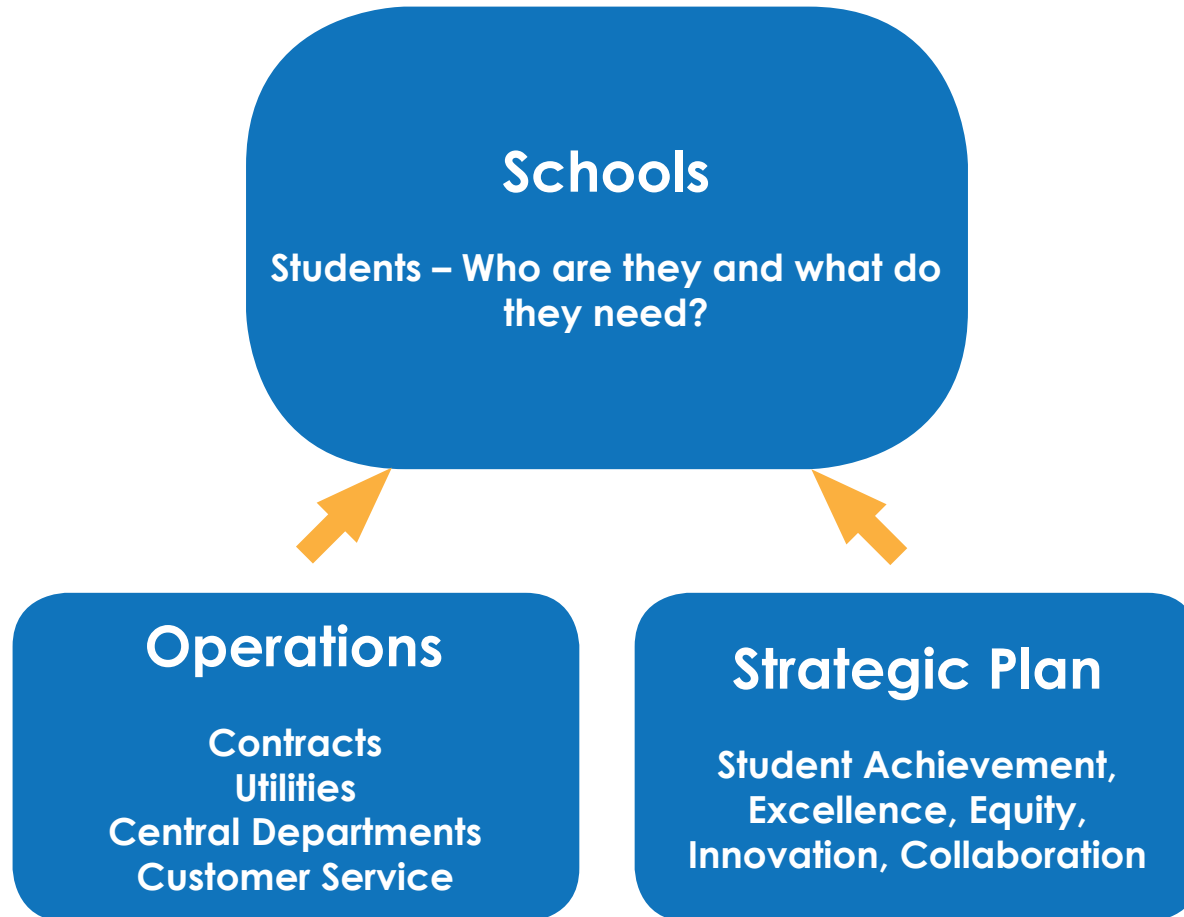
Court Overturn of PERS Reform Increases Rates

PERS Rate



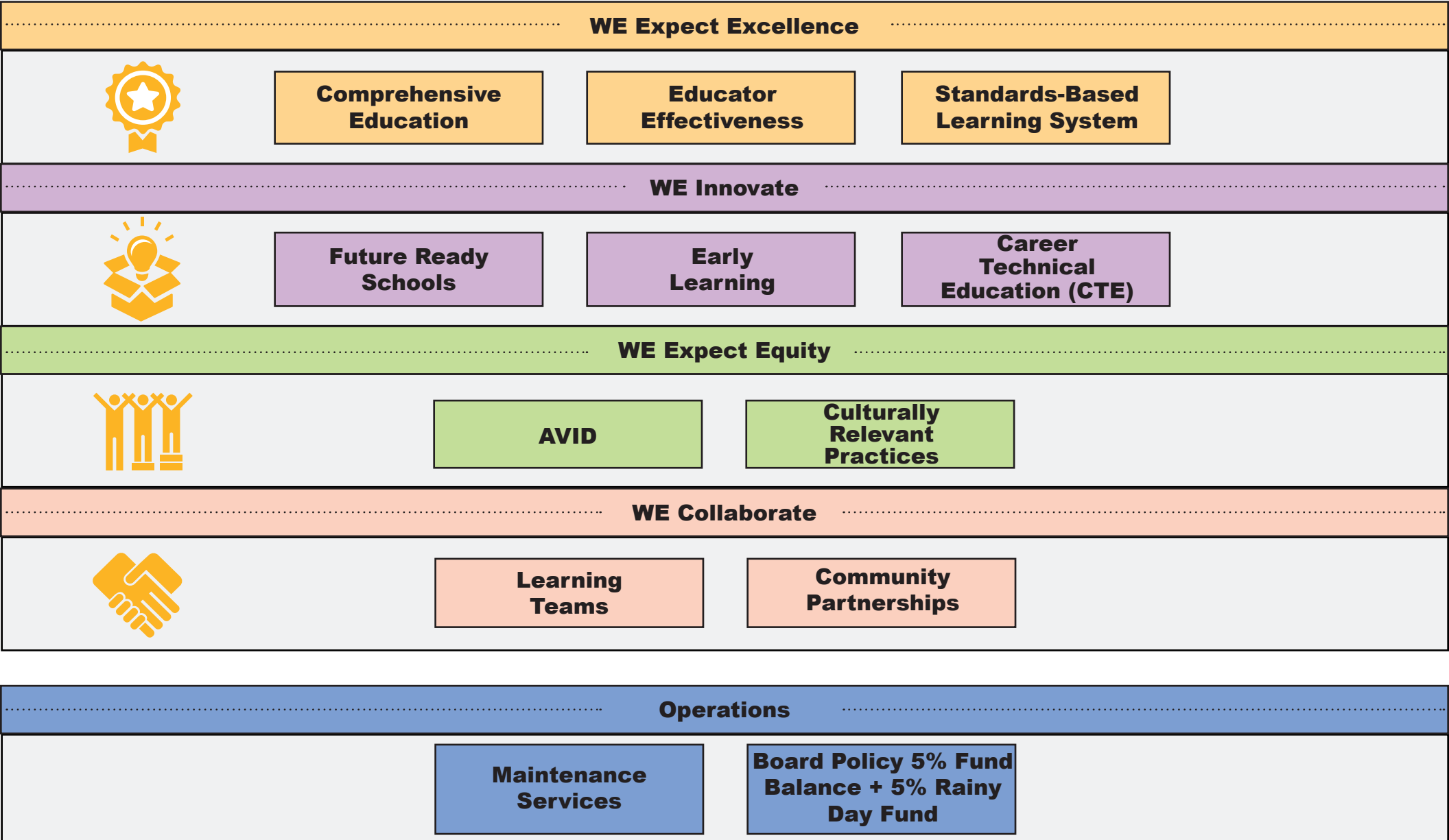
Source: PERS Actuarial Report 11/18/16

Overview of the Plan



Investments

Analysis and additional stakeholder feedback pointed to specific investments and goals



Investment Work Groups for 2017-18

WE Expect Excellence



High School Programs

Middle School Programs

WE Innovate



Early Learning

**Measure 98/CTE/
Increase Graduation Rates**

WE Expect Equity



Intervention and Special Education

Social and Emotional Learning

English Language Learners

Operations

Maintenance Services



Current Investments

Investments	Description
Comprehensive Education	Class size reduction, increase instructional days, increase music and PE programs
Educator Effectiveness	Mentors, Teach for Beaverton
Standards Based Learning System	Math/science intervention 9th grade, curriculum professional development, increase Early College program, summer school, intervention teachers K-8, credit recovery, academic needs staffing
Future Ready	Library Instruction Technology Teacher (LITT), technology devices and curriculum, professional development
Early Learning	Pre-k classes in two schools, develop partnerships for future programs
Career Technical Education (CTE)	Internship program, Aloha High School Career Technical Education classrooms, increase class offerings
AVID	AVID elective teachers, professional development
Culturally Relevant Practices	Counselors, professional development, equity TOSA, ELL research group, social workers, health assistants, intervention and Special Education research group, dual language staffing, Student Success Coaches
Learning Teams	Learning team facilitators, student achievement data system
Community Partnerships	Community Resource Coordinator
Operations	Custodian and maintenance workers, update vehicles and equipment



Future Investment Priorities

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

Investments	Phase-In Timeline	
Comprehensive Education	Short Term:	Maintain current class size allocation and address large class sizes through a reserve bank of classroom teachers; classroom teachers for continuity of program in comprehensive middle schools
	Medium Term:	Add 3 student days in 18-19 and maintain instructional days in the future
	Longer Term:	Maintain current elementary music and PE teacher allocation
Educator Effectiveness	Short Term:	Professional development & instructional materials; supports for building administrators and teachers in all core areas; student behavior program with Student Success Coaches at elementary schools; engage administrators in training and calibration related to educator evaluation
	Medium Term:	Reduce teacher/administrator ratio from 34 to 30 to increase instructional feedback to teachers
	Longer Term:	Reduce teacher/administrator ratio from 30 to 27 to increase instructional feedback to teachers
Standards-Based Learning System	Short Term:	Professional development for English Language Arts and Math, content area articulation, refinement of learning targets/rubrics, calibration & moderation, grading & reporting practices; review and revise documents related to SBLS strategic planning
	Medium Term:	Professional development for English Language Arts, Math, English Language Proficiency, & Health
	Longer Term:	Professional development for Science, Fine Arts, Social Sciences, & World Language
Future Ready	Short Term:	Continue model of Innovation Strategists to support innovative practices schools; continue professional development efforts through Week 3 classes, after school opportunities, summits, and school-based options
	Medium Term:	Evaluate student digital device program for future device purchases, Fund new and replacement student devices; evaluate infrastructure, provide connectivity to students outside of school as needed
	Longer Term:	Increase use of Canvas and other digital friendly classroom practices; develop sustainable funding plan through general fund for maintaining digital device program for students

Future Investment Priorities

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

Early Learning	Short Term:	Create 10-year plan for Early Learning implementation; training for principals and teachers; pre-k classrooms at <i>five title</i> schools using blended funds; <i>strengthen existing early learning Career Technical Education (CTE) programs</i> , kindergarten transition programs at 7-10 schools; parenting education & supports at all Title I schools
	Medium Term:	Open 3 <i>more</i> school based pre-ks; professional development, expand kindergarten transition program to all Title-I schools; continue family partnership/parent support
	Longer Term:	District run pre-K open at 3 more schools, professional development; continue kinder transition and family/parent education work
Career Technical Education (CTE)	Short Term:	Hire Career Technical Education co-coordinators; district-wide committee to generate innovative Career Technical Education ideas; evaluation of current Career Technical Education district programs; alignment of Perkin’s Grant to quality Career Technical Education district programs; develop plan for future expansion of Career Technical Education programs; HS graduates with at least 1 Career Technical Education credit increases from 44% to 49%
	Medium Term:	Continued development of quality Career Technical Education programs; coordinate grades 6-12 Career Technical Education alignment; every HS has at least 2 quality Career Technical Education programs; align Measure 98 district plan to our vision and priorities; coordination of Career Technical Education “magnet” programs in the district; HS graduates with at least 1 Career Technical Education credit increases from 49%-55%
	Longer Term:	7 district “magnet” programs (1 at each comprehensive HS and Terra Nova); each HS has 2-3 quality Career Technical Education programs at their site; search for separate Career Technical Education district building; alignment of HS schedule to support student access to magnet Career Technical Education programs; HS graduates with at least 1 Career Technical Education credit increases by 55%-65% with an emphasis on under-served student populations
AVID	Short Term:	All schools make progress toward earning the "Emerging AVID school-wide" status
	Medium Term:	3 schools earn the "Emerging AVID school-wide" status
	Longer Term:	One school recognized as a National Demonstration Site; one school recognized as a National Site of Distinction

Future Investment Priorities


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

Culturally Relevant Practices	Short Term:	Increase number of teachers trained on culturally relevant teaching practices; administrators identify concrete "look fors" of culturally relevant classroom practices and use them in evaluating and supporting teachers; provide Culture of Care professional development for all elementary schools; implement universal formative assessment tools for all Special Education Programs (Resource and Specialized Program)
	Medium Term:	Provide professional development for non-classroom teachers in culturally relevant practices to develop a culturally relevant organization; staff all elementary schools with Student Success Coaches; provide Culture of Care professional development for all middle schools; all Special Education staff will write IEP goals that align to learning targets and are progress monitored through a formative assessment tool
	Longer Term:	Integrate key elements of culturally relevant teaching and practices into the evaluation and hiring process; provide all schools with Culture of Care professional development and staffing for Student Success Coaches; all Special Education staff will have an instructional schedule and curricular materials that align with the assessed needs of Student with Disabilities that have been identified through formative assessment tools
Learning Teams	Short Term:	Train K-12 Collaboration Facilitators to support weekly collaboration
	Medium Term:	Staff reports value in 90-minute Early Release; enhance PD opportunities with T&L supported Week 3
	Longer Term:	Maintain Early Release; teams have skills to work collaboratively and effectively
Operations	Short Term:	Addition of approximately 24 custodians, replacement of 30 fleet vehicles, continued alignment of Computer Maintenance Management System (CMMS) systems, training of staff to comply with Healthy and Safe Schools plan, data population of Healthy and Safe Schools materials of concern database
	Medium Term:	Addition of approximately 22 custodians, replacement of 30 fleet vehicles
	Longer Term:	Final custodial additions, sale of first year of Enterprise leased vehicles, acquisition of 20 vehicles



Investment Priorities


Summary of New Investments Added Annually


	Investment Priorities	Prior Annual Investment	2017-18 Investment Change	Total Annual Investment	Additional Investment 2018-19	Additional Investment 2019-20	Additional Investment 2020-21	Additional Investment 2021-22
Excellence	Standards Based Learning System - General Fund	\$ 18,100,000	\$ (6,200,000)	\$ 11,900,000	\$ -	\$ -	\$ -	\$ -
	Standards Based Learning System - Bond Fund	\$ 600,000	-	\$ 600,000	-	-	-	-
		\$ 18,700,000	\$ (6,200,000)	\$ 12,500,000	-	-	-	-
Excellence	Educator Effectiveness	\$ 600,000	-	\$ 600,000	-	\$ 900,000	-	\$ 1,400,000
Excellence	Comprehensive Education - Class Size	\$ 11,800,000	\$ (1,200,000)	\$ 10,600,000	-	-	-	-
Excellence	Comprehensive Education - Instructional Time	\$ 2,500,000	-	\$ 2,500,000	-	-	-	-
Excellence	Comprehensive Education	\$ 2,600,000	\$ (200,000)	\$ 2,400,000	\$ 1,700,000	-	-	-



Investment Priorities (continued)

Summary of New Investments Added Annually


	Investment Priorities	Prior Annual Investment	2017-18 Investment Change	Total Annual Investment	Additional Investment 2018-19	Additional Investment 2019-20	Additional Investment 2020-21	Additional Investment 2021-22
Innovate	Future Ready Schools - General Fund	\$ 3,600,000	\$ (200,000)	\$ 3,400,000	-	-	-	\$ 100,000
	Future Ready Schools - Bond Fund	\$ 6,100,000	\$ (1,600,000)	\$ 4,500,000	-	-	-	-
		\$ 9,700,000	\$ (1,800,000)	\$ 7,900,000	-	-	-	\$ 100,000
Innovate	Early Learning - General Fund	-	\$ 400,000	\$ 400,000	\$ 600,000	\$ 400,000	\$ 400,000	-
Innovate	CTE - Measure 98	-	\$ 5,000,000	\$ 5,000,000	\$ 6,100,000	\$ 5,300,000	\$ 5,300,000	\$ 5,300,000

	Investment Priorities	Prior Annual Investment	2017-18 Investment Change	Total Annual Investment	Additional Investment 2018-19	Additional Investment 2019-20	Additional Investment 2020-21	Additional Investment 2021-22
Equity	AVID - General Fund	\$ 2,300,000	\$ 100,000	\$ 2,400,000	\$ 100,000	-	-	-
	AVID - Nike Grant	\$ 300,000	\$ (100,000)	\$ 200,000	-	-	-	-
		\$ 2,600,000	-	\$ 2,600,000	\$ 100,000	-	-	-
Equity	Culturally Relevant Practices	\$ 6,600,000	\$ (300,000)	\$ 6,300,000	\$ (300,000)	\$ (300,000)	-	-
Equity	Special Education	-	-	-	\$ 400,000	\$ 300,000	-	-
Equity	Culture of Care	-	\$ 1,200,000	\$ 1,200,000	-	-	-	-



Investment Priorities (continued)

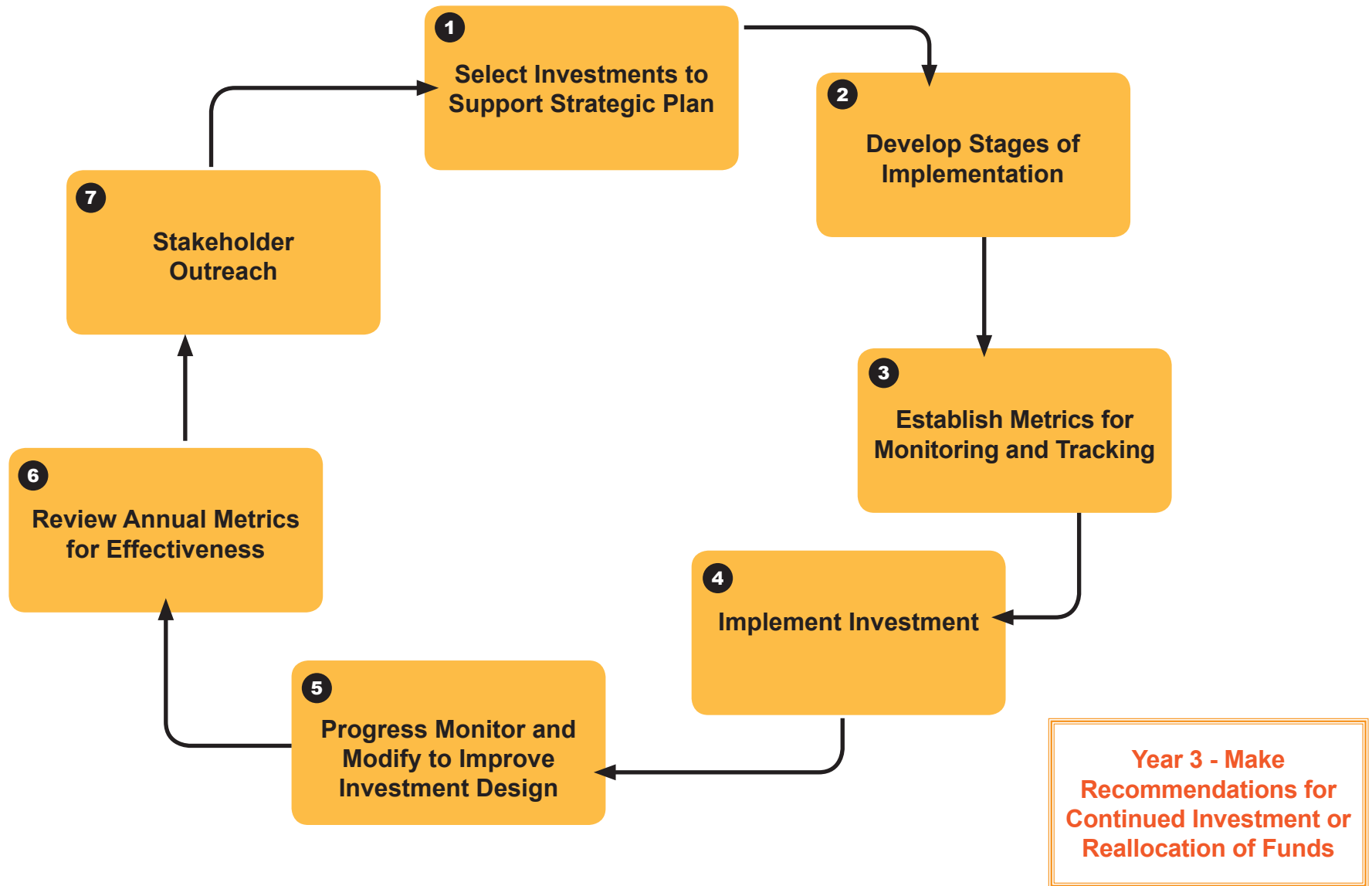
Summary of New Investments Added Annually

	Investment Priorities	Prior Annual Investment	2017-18 Investment Change	Total Annual Investment	Additional Investment 2018-19	Additional Investment 2019-20	Additional Investment 2020-21	Additional Investment 2021-22
Collaboration	Learning Teams	\$ 300,000	\$ 200,000	\$ 500,000	-	-	-	-
Collaboration	Community Partnerships	\$ 100,000	-	\$ 100,000	-	-	-	-

Total	\$55,500,000	\$(2,900,000)	\$52,600,000	\$8,600,000	\$6,600,000	\$5,700,000	\$6,800,000
--------------	---------------------	----------------------	---------------------	--------------------	--------------------	--------------------	--------------------

Progress

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



Investments for Evaluation in 2017-18

Pillar	Strategic Investment	Description
Excellence	Comprehensive Education	Class size, music & PE teachers, Arts for Learning
Excellence	Educator Effectiveness	Mentors, Teach for Beaverton
Excellence	Standards Based Learning System	PCC Credit, Intervention teachers, academic funding, Professional Development, 5.5/8.5 Summer School, credit recovery
Innovation	Future Ready	LITT Positions, devices, digital curriculum
Equity	AVID	AVID
Equity	Culturally Relevant Practices	Counseling, Equity TOSA, ELL research, social workers, dual language staffing
Collaboration	Learning Teams	Secondary Facilitators