

# REPORT

**Resourcing Student Success  
Our Continuing Journey**



[www.pollev.com/jasondemerath220](http://www.pollev.com/jasondemerath220)



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# Fort Atkinson Stat Sheet



★ Designed by TownMapsUSA.com

45 Minutes West of Milwaukee

City of 12,500

2,600 Students

410 Regular Staff

General Fund Operating Budget

~\$42 Million

[www.fortschools.org](http://www.fortschools.org)



# ROAD MAP

1 FORT

1

Our Journey

2

Strategic Planning

3

AROI



1 FORT

Our Journey

1



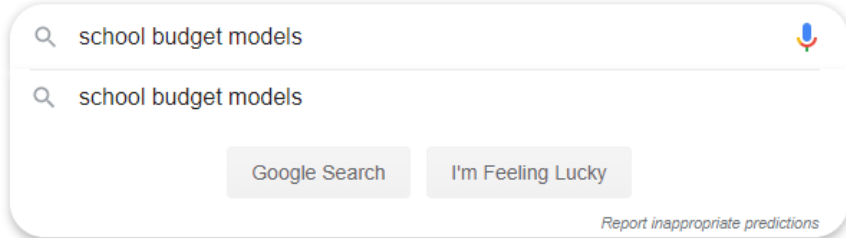
# Fort Atkinson's Journey

School District of Fort Atkinson  
**5-YEAR FINANCE & OPERATIONS AGENDA STRATEGIC PLAN – YEARLY GOALS**

Strategic Plan Goal	YEAR 1 2013-2014	YEAR 2 2014-2015	YEAR 3 2015-2016	YEAR 4 2016-2017	YEAR 5 2017-2018	OUTCOME(S)
<b>Finance &amp; Budgeting</b> <u>Overall Goal:</u> Develop and maintain a financial plan to support the implementation of the academic strategic plan that is transparent and fiscally prudent.  <b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>Five (5) year projections shall be presented annually to the Board of Education to initiate budget planning for the next fiscal year</li> <li>The District will maximize the opportunity provided by the retirement of the referendum debt used to fund the High School</li> <li>A plan to leverage the retirement of the referendum debt used to fund geothermal installations shall be drafted by July 1, 2018</li> <li>An open enrollment study with recommendations shall be completed</li> <li>Alternative revenue sources: partnerships (sponsorship, enrollment, etc.) shall increase over the five year period</li> </ul>	<ul style="list-style-type: none"> <li>Finalize 2013-14 budget and present five (5) year projection to initiate budget planning for 2014-15</li> <li>Plan for referendum to be presented to electorate in Spring, 2014 with Board approval at the November, 2013 Board meeting</li> <li>Communicate the referendum on the ballot in Spring, 2014</li> </ul>	<ul style="list-style-type: none"> <li>Finalize 2014-15 budget and present five (5) year projection to initiate budget planning for 2015-16</li> <li>Study open enrollment in conjunction with the enrollment/community needs study under "Buildings &amp; Grounds" focus with recommendations to be made by the May joint meeting</li> <li>Develop formalized process for staffing additions to be used in the 2015-16 budget process by the January joint meeting</li> </ul>	<ul style="list-style-type: none"> <li>Finalize 2015-16 budget and present five (5) year projection utilizing the Baird Forecasting Model to initiate budget planning for 2016-17</li> <li>Develop and pursue "exploratory" list of partnerships with other agencies and organizations</li> <li>Begin planning and work on referendum to be presented to electorate in Spring, 2017</li> <li>Consider alternate budget development models</li> </ul>	<ul style="list-style-type: none"> <li>Finalize 2016-17 budget and present five (5) year projection to initiate budget planning for 2017-18</li> <li>Continue work on referendum to be presented to electorate in Spring, 2017</li> <li>Communicate the referendum on the ballot in Spring, 2017</li> </ul>	<ul style="list-style-type: none"> <li>Finalize 2017-18 budget and present five (5) year projection to initiate budget planning for 2018-19</li> <li>Study open enrollment in conjunction with the enrollment/ community needs study under "Buildings &amp; Grounds" focus</li> </ul>	<p>Project the financial needs of the District given imposed external limitations on unknown variables.</p> <p>Incorporate into the long range fiscal projections a debt retirement strategy that maximizes the District's ability to support its programs and services while considering the impact to local taxpayers.</p> <p>Develop a long term fiscal strategy to maintain high level programs and services within state and federally imposed fiscal constraints.</p> <p>Conduct an open enrollment study to guide future planning.</p> <p>Maximize alternative revenue sources.</p> <p>Explore partnerships with agencies and organizations in an effort to effectively reduce costs.</p>

2017

- Consider alternate budget development models



[Smarter School Spending](#) [About](#) [Success Stories](#) [Framework](#) [Resources](#)

A new way to align resources with student achievement goals through:

- ✔ A true partnership between academic and finance staff
- ✔ Putting money where it will do the most good for kids
- ✔ Better planning and decision-making



# Fort Atkinson's Journey

- Began in the middle of a strategic plan
  - Assumed the model was linear = Stuck @ Start
    - False start trying to direct rest of admin team to implement the model





# A BETTER WAY TO BUDGET

BUILDING SUPPORT FOR BOLD,  
STUDENT-CENTERED CHANGE  
IN PUBLIC SCHOOLS

NATHAN LEVENSON

Author of *Smarter Budgets, Smarter Schools*

“Some will feel the focus should be more on teaching and learning, but funding teaching and learning priorities *is* focusing on teaching and learning.”

- Page 76

“When principals help set the priorities for the district, not just their schools, and engage in the formative research to identify the district’s needs, they are much more likely to understand, embrace, and advocate for bold budgets.”

- Page 69



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## How much functional knowledge of the budget do you believe your building administrators have?

None

A little bit

Enough that they understand what I am talking about

Enough that they can explain our budget decisions to their parents

Total Results: 0

# Reframing Our Role

- Facilitate v. Direct
- Deeply Involve Principals in Decisions & Recommendations
- Provide the Data Needed for Others to Learn & Make Decisions
- Share Our Views Last
- Share Information & Let Their Curiosity Drive Discussions
- Encourage Professional Disagreement (Cognitive Conflict)
- Entire Admin Team Supports All Recommendations to Board of Education

**Culture eats strategy  
for breakfast.**

- Peter Drucker



# Small Wins

- Buildings & Grounds Budgeting Centralized
- Technology Budgeting Centralized
- Professional Development Planning Centralized
- Staffing Based on Student Needs v. Assigned to Building (Entitlement)
- Agreement on Need for Interventionists
- Process Development for Large Project Consideration
- Encourage Spending Early in Year

**Find Small Ways to Show Impact of Model & Build Momentum**





# Resourcing Student Success

- Year Round Monthly “Resourcing Student Success” Meetings
- Not Just Finance Topics > Whatever is Needed That Month Related to ALL Resources
- Resourcing Governance Team
- Externally Imposed Milestones Still Need to be Met
- Build Team’s Functional Knowledge of School Finance in Pieces Throughout Year
- Build Team’s Capacity to Connect ALL Resources to Student Success & Goals



# Other Processes

- Board Request > Team Discussion & Evaluation
- Carryover
  - Team Discussion > Ability to See Overlaps
  - Fund Balance = Carryover
    - Making it More Transparent Yields “Just In Time” Conversations Instead of Waiting Until Next Year’s Budget Cycle



# Tips & Tools

## TIPS

Go Slow to Go Fast

This is a CULTURE CHANGE

This is a Model, Not a “Boxed” Program

Not Plug & Play

It Will Be Messy!

Use Samples from Other Districts

Have Conversations With Your Board About the Model Through Policy Development

## TOOLS

[SSS Recommended Policies](#)

[GFOA Financial Policies](#)

[Year End Carryover Policy](#)

[Year End Carryover Request Form](#)

[Criteria for Carryover Request Eval](#)

[SDFB Budget Principles](#)





# Strategic Planning with AROI in mind

# Strategic Planning

1 FORT

2



# STEPS to SUCCESS

## 1FORT Forward

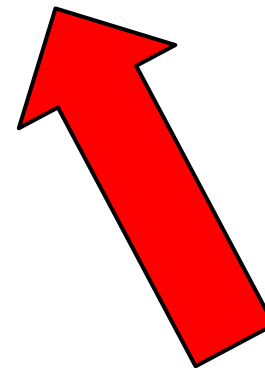


# JUNE 2021

Time for **GOAL SETTING** including  
COMPREHENSIVE DATA REVIEW including  
BASELINE DATA

*Board works with Administration to draft the  
Strategic Plan Goal(s) and measures of success.*

- *Plan Length*
- *Success Indicators & Return on investment  
Benchmarks*



**Define**

JUNE

*What are we aiming for?*

STRATEGIC PLAN GOAL(S)

# FORT

## — VISION —

Achieving distinction in all we do

## — MISSION —

Cultivate an inclusive high-performing culture of growth and community

## — GOAL AREAS —

### INCLUSIVE CULTURE OF GROWTH

Our learning community will exemplify an inclusive culture of growth responsive to our learner and community needs.

### COMMUNITY DISTINCTION

The district will be the preferred educational option in the region as evidenced by annual growth in the pupil count and open enrollment.

### HIGH PERFORMANCE

All schools, as well as the District, will achieve a State of Wisconsin accountability rating of "Significantly Exceeds Expectations" no later than the 2025-26 report card with evidence of annual growth.

## Guiding Principle

### FISCAL RESPONSIBILITY

Our comprehensive budget process engages all stakeholders based on best practices in school budgeting to support academic and finance collaboration and best align resources to desired student outcomes.

The budget process is a plan, a tool for transparency, and a structure for ensuring fiscal accountability.

## District Beliefs

### LEVERAGE RESOURCES FOR STUDENT SUCCESS

Students are the highest priority in all fiscal decisions to leverage funds and maximize student success.

Investing in our human capital is key to realizing our mission and vision.

Transparency of funds management and shared understanding of funds allocation is achieved through opportunities for engagement throughout the budget process.

The community's investment in our schools and facilities show pride in our partnerships and shared fiscal interdependence.

Integrating environmental-conscious practices demonstrates sound fiscal management and environmental sustainability within our local and global community.



Academic  
Return on  
Investment  
(AROI)

1 FORT

3



# Thinking different about AROI ...

## INITIAL WAY of THINKING

Connecting AROI to individual expenditures / investments

Connecting varying metrics to parts within the same system

Slippery mindset to “justifying” or “keeping” the specific position / program / resource

Focusing on components vs. whole & small impact vs. system impact



## NEW WAY of THINKING

Connecting AROI to a plan with interdependent components

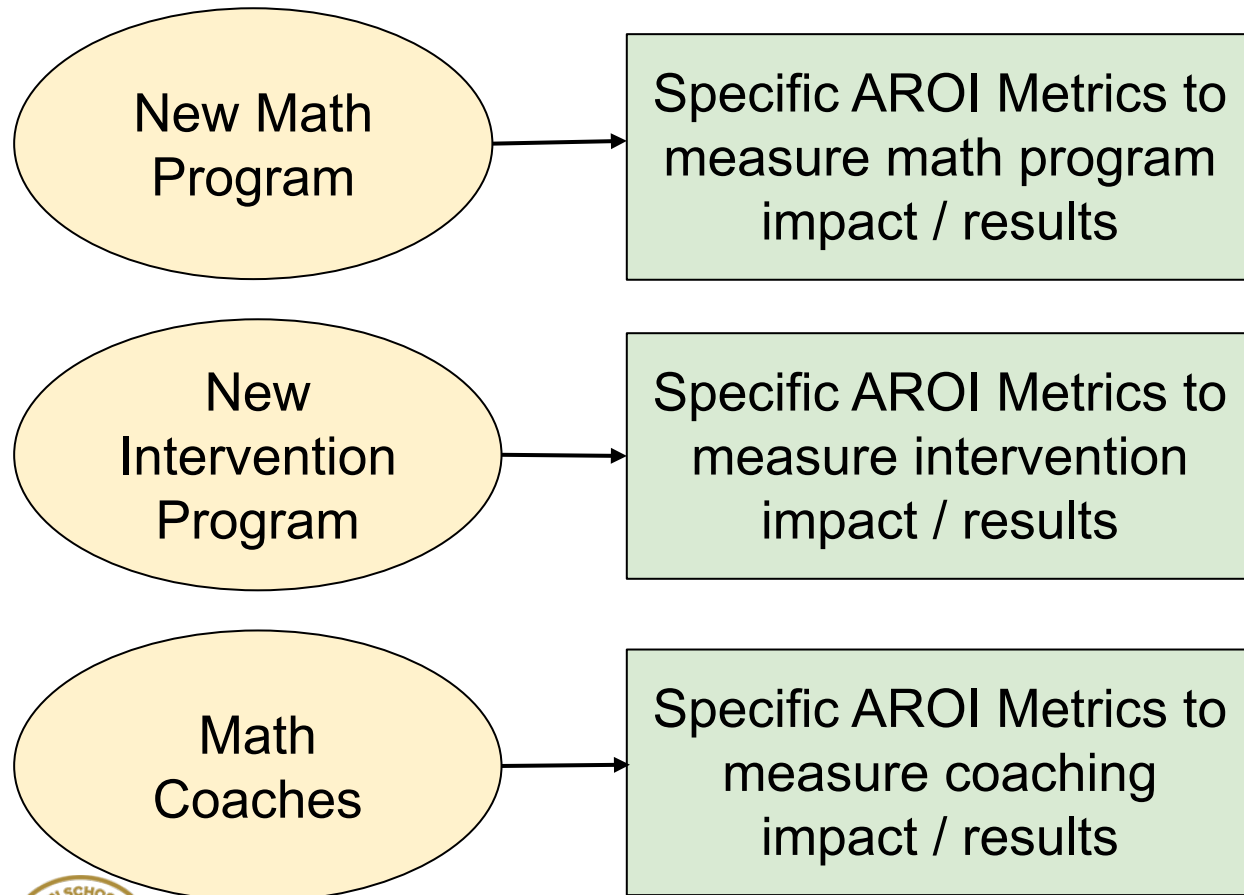
Single results metric connected to the strategic plan

Opportunity to evaluate all components for impact within the overall intended result

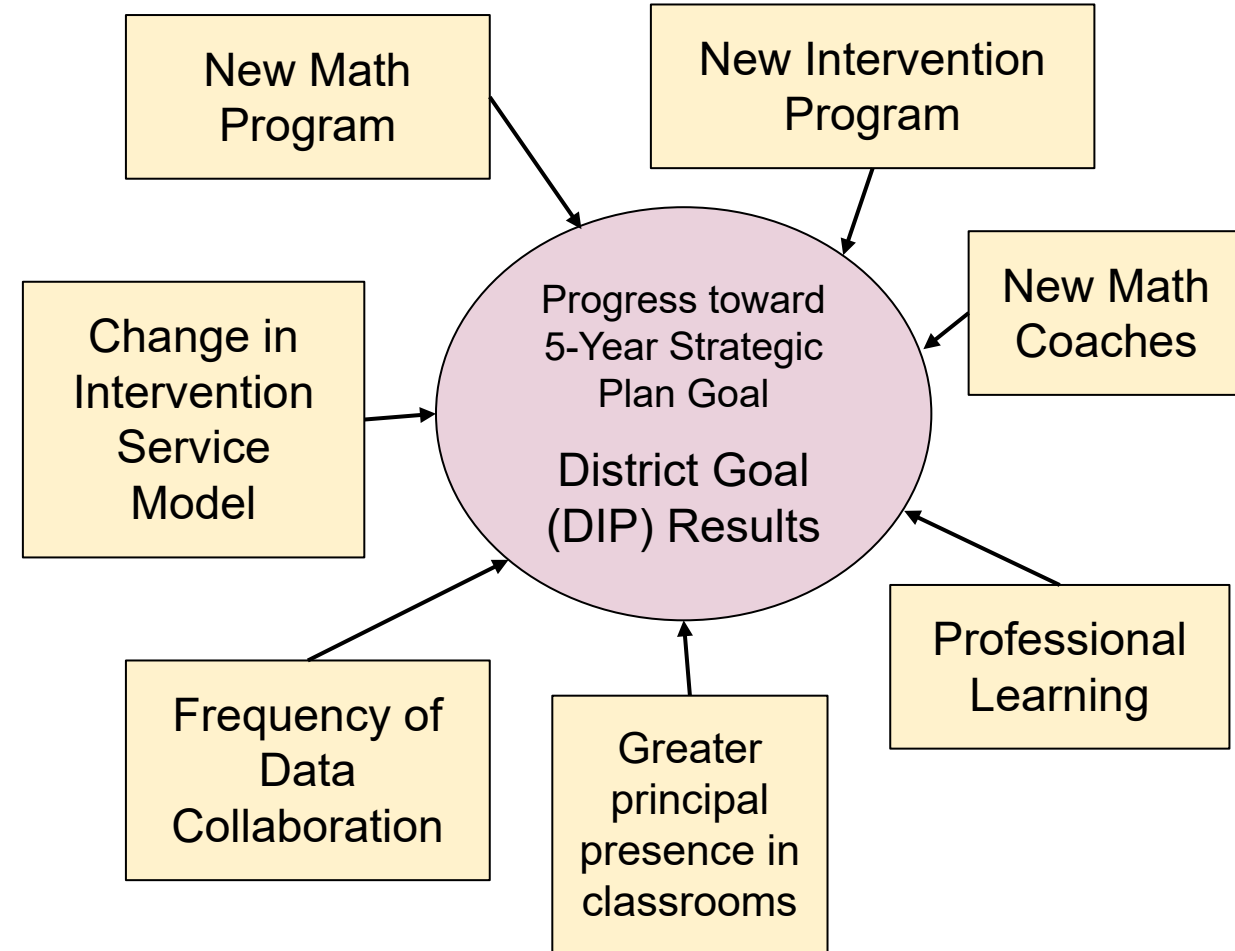
Focus on building strong systems to achieving the overall strategic plan goal

# What does this look like?

## INITIAL WAY of THINKING



## NEW WAY of THINKING





# AROI

## → School is a Complex System

- ◆ Is it possible to measure impact of one investment without factoring in other impacts?

## → We Must Still Measure Impact of Investments within the Complex System

- ◆ Test/Confirm/Monitor Results from Strategic Improvements and Strategic Investments
- ◆ To Gauge Impact so we may:
  - Expand – Duplicate – Maintain – Redesign – Combine – Sunset & Reallocate Investment

“I’ve been living in a complex system all these years and I thought it was just crazy chaos. Now that I know that it is normal, it feels okay because I realize I can have a positive impact.”

# Key Questions for AROI ...

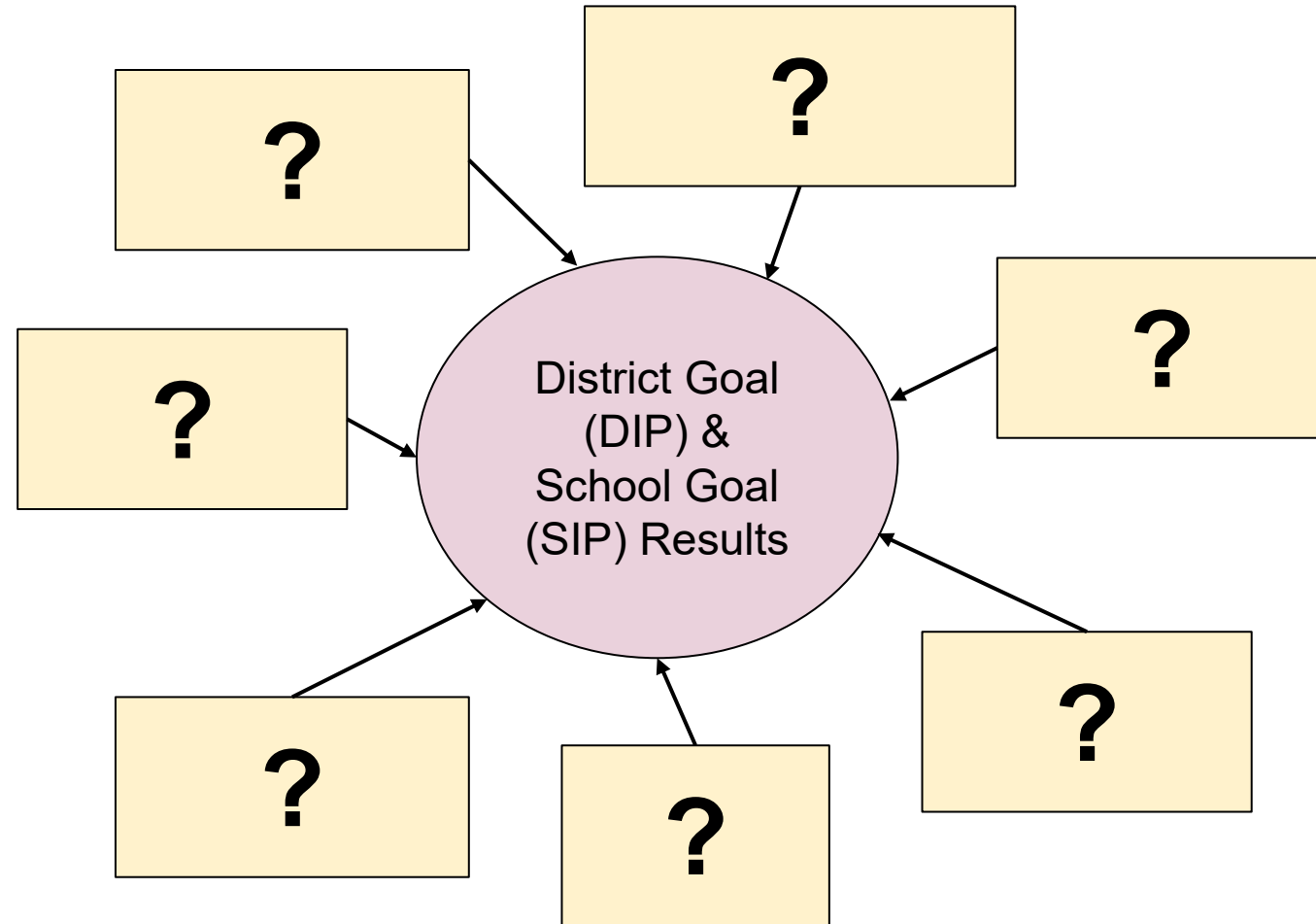
- What are the **key components of your plan** put in place to meet the long-term strategic plan goal and achieve the short-term District Improvement Plan goal?
- How are individual **components connected, interdependent and aligned** to intended result?
- What **individual metrics** will you use to measure / monitor individual components to determine if each is producing the desired result within the improvement plan?
- How are we **fostering systems thinking** to see our efforts as connected and focused on the overall goal result?



# AROI Towards Your Goal: **What Are Your Factors Impacting Results & How Will You Measure?**

**If you meet your goal, what will you attribute it to?**

**What will you EXPAND and ENHANCE?**



**If you don't meet your goal, what will you attribute it to?**

**What will you ADDRESS, CORRECT or MOVE AWAY FROM to meet your goal?**

## ACHIEVEMENT GOAL

All schools as well as the District will achieve a State of Wisconsin accountability rating of "Significantly Exceeds Expectations" no later than the 2025-26 report card with evidence of annual growth.

## GROWTH GOAL

Our learning community will exemplify an inclusive culture of growth responsive to our learner and community needs.



# Board Discussion on Strategies

- Providing a competitive compensation and benefit package for 2022-2023 and in our financial forecasting
- Right-sizing our staff to align to current and forecasted enrollment and program needs
- Evaluation of all vacancies for possible attrition or restructuring
- Analysis of current programming to prioritize return on investment and recognize opportunities for strategic abandonment
- Engaging community in potential capital investment of a new middle school and addressing urgent security and maintenance needs
- Continued planning for an operational referendum
- Leveraging one-time ESSER funds to cover shortfalls and make strategic investments



# Budget Strategy Evaluation

## Strategy: Provide Competitive Compensation & Benefit Package

### Sub-Strategy: Move all active employees to HSA

Funds 10 & 27	2021-22 Actual	2022-23 Budget	Difference	% Change
Cash-In-Lieu Spend	\$131,476	\$109,085	-\$22,391	-17.03%
Health Insurance Spend	\$4,996,234	\$4,913,368	-\$82,866	-1.66%
HSA Spend	\$837,964	\$1,513,212	\$675,248	80.58%
HRA Spend	\$367,606	\$0	-\$367,606	-100.00%
<b>Total Spend</b>	<b>\$6,333,280</b>	<b>\$6,535,665</b>	<b>\$202,385</b>	<b>3.20%</b>

### Sub-Strategy: Provide Full CPI Increase (4.7%) & Market Adjustments

Funds 10 & 27	2021-22 Actual	2022-23 Budget	Difference	% Change
Salaries	\$22,858,044	\$23,447,023	\$588,979	2.58%
Benefits	\$10,824,902	\$11,425,331	\$600,429	5.55%
<b>Total Spend</b>	<b>\$33,682,946</b>	<b>\$34,872,354</b>	<b>\$1,189,408</b>	<b>3.53%</b>



# Budget Strategy Evaluation

## Strategy: Right-Size Our Staff to Align to Enrollment & Evaluate Vacancies for Attrition/Restructuring

Funds 10 & 27 Salaries	2021-22 Actual	2022-23 Budget	Difference	% Change
Administrative Staff	\$1,890,949	\$1,963,555	\$72,606	3.84%
Certified Staff	\$15,409,909	\$15,943,328	\$533,419	3.46%
Support Staff	\$4,222,198	\$4,276,619	\$54,421	1.29%
<b>Total Spend</b>	<b>\$21,523,056</b>	<b>\$22,183,502</b>	<b>\$660,446</b>	<b>3.07%</b>

Funds 10 & 27 FTE (K-12)	2021-22 Actual	2022-23 Budget	Difference	% Change
Administrative Staff	18.00	18.00	0.00	0.00%
Certified Staff	256.10	248.03	-8.07	-3.15%
Support Staff	150.94	141.64	-9.30	-6.16%
<b>Total FTE (K-12)</b>	<b>425.04</b>	<b>407.67</b>	<b>-17.37</b>	<b>-4.09%</b>
<b>Headcount (K-12)</b>	<b>2435</b>	<b>2376</b>	<b>-59.00</b>	<b>-2.42%</b>



# Budget Strategy Evaluation

## Strategy: Leveraging One-Time ESSER Funds to Cover Shortfalls & Make Strategic Investments

ESSER Funding Source	2020-21 Actual	2021-22 Actual	2022-23 Budget	Total by Source
ESSER I	\$185,396	\$67,123	\$0	\$252,519
ESSER II	\$0	\$840,141	\$422,478	\$1,262,619
ESSER III	\$0	\$541,891	\$727,731	\$1,269,622
<b>Total ESSER Funding</b>	<b>\$185,396</b>	<b>\$1,449,156</b>	<b>\$1,150,209</b>	<b>\$2,784,760</b>





# Reflection & Connection

## JOURNAL

Take 5 Minutes to Write Down Your Thoughts in the Following Categories:

I Can Do  
Now.

I Need to Learn  
More About.

I Need to Connect With  
These People.



# In a word or two, share what you are going to DO NOW.

## Join by Web



## Join by Text



- 1 Go to **PollEv.com**
  - 2 Enter **JASONDEMERAT220**
  - 3 Respond to activity
- 1 Text **JASONDEMERAT220** to **37607**
  - 2 Text in your message

Total Results: 0

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# In a word or two, share what you **NEED TO LEARN MORE** **ABOUT.**

## Join by Web



## Join by Text



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