

ENGAGELCS

Instructional priorities and resource use
Released: October 1, 2013

BCG

THE BOSTON CONSULTING GROUP

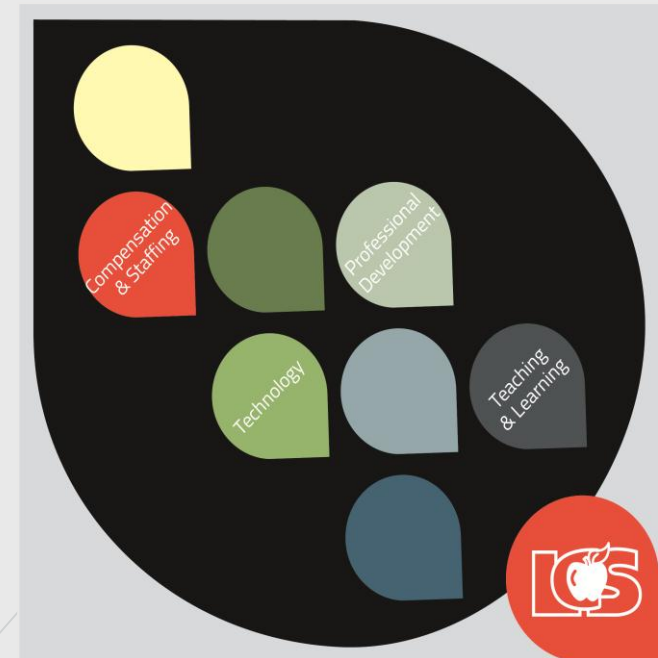


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Message from Superintendent Moxley

Lake County Schools is at a crossroads. In the last several years, Lake County Schools has seen an increase in student population paired with a relatively flat budget. Additionally, our grade as a district has declined. The question for our district is: How do we increase student achievement for a growing population, without relying on additional resources? EngageLCS is an unprecedented opportunity to embrace a bold set of initiatives that hold the promise to meet this need.

EngageLCS is focused on strategically aligning resources to our instructional priorities and creating a long-term plan to make these priorities a reality. When enacted, this plan will transform teaching and learning for Lake County Schools.

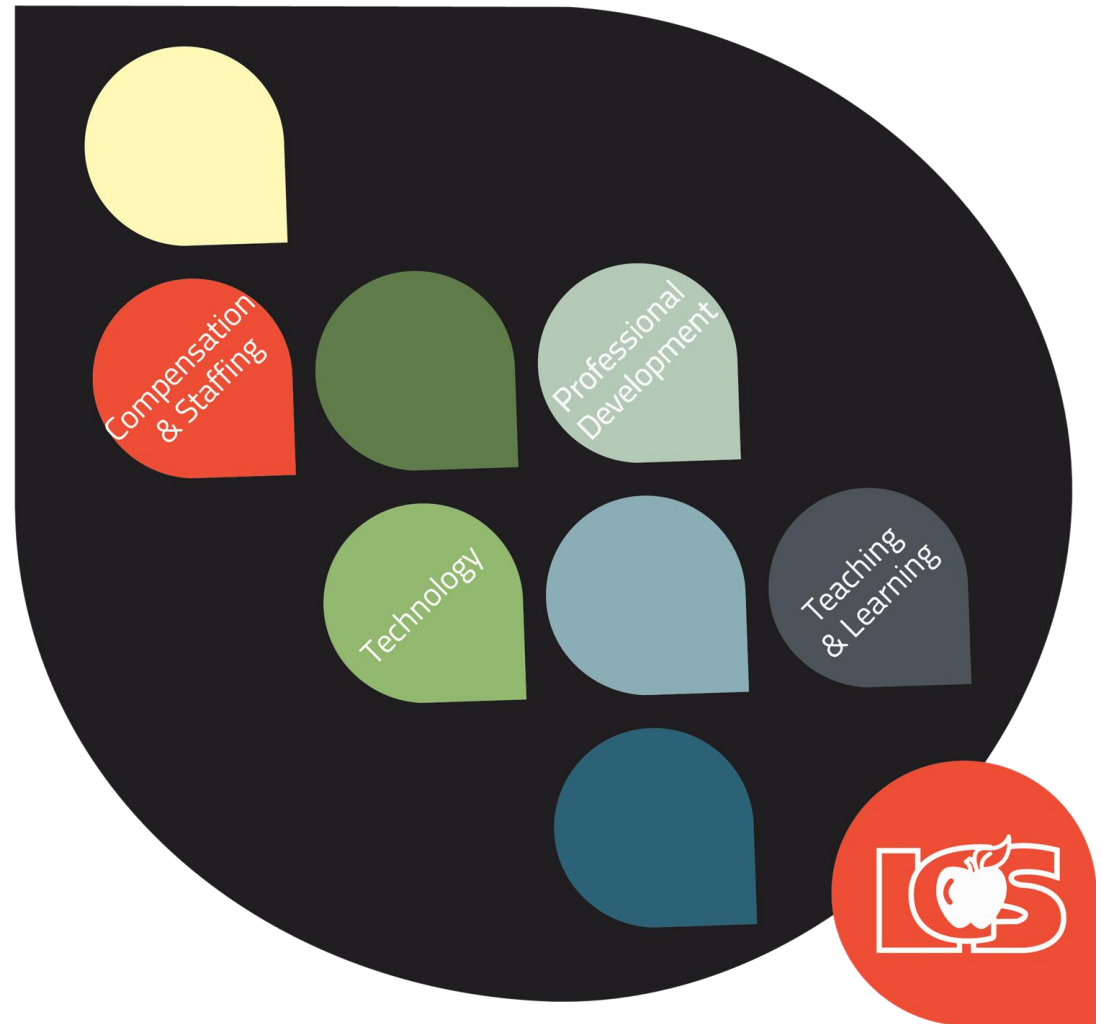
Your participation is critical to the success of EngageLCS. Together we can make this vision a reality.

Dr. Susan Moxley

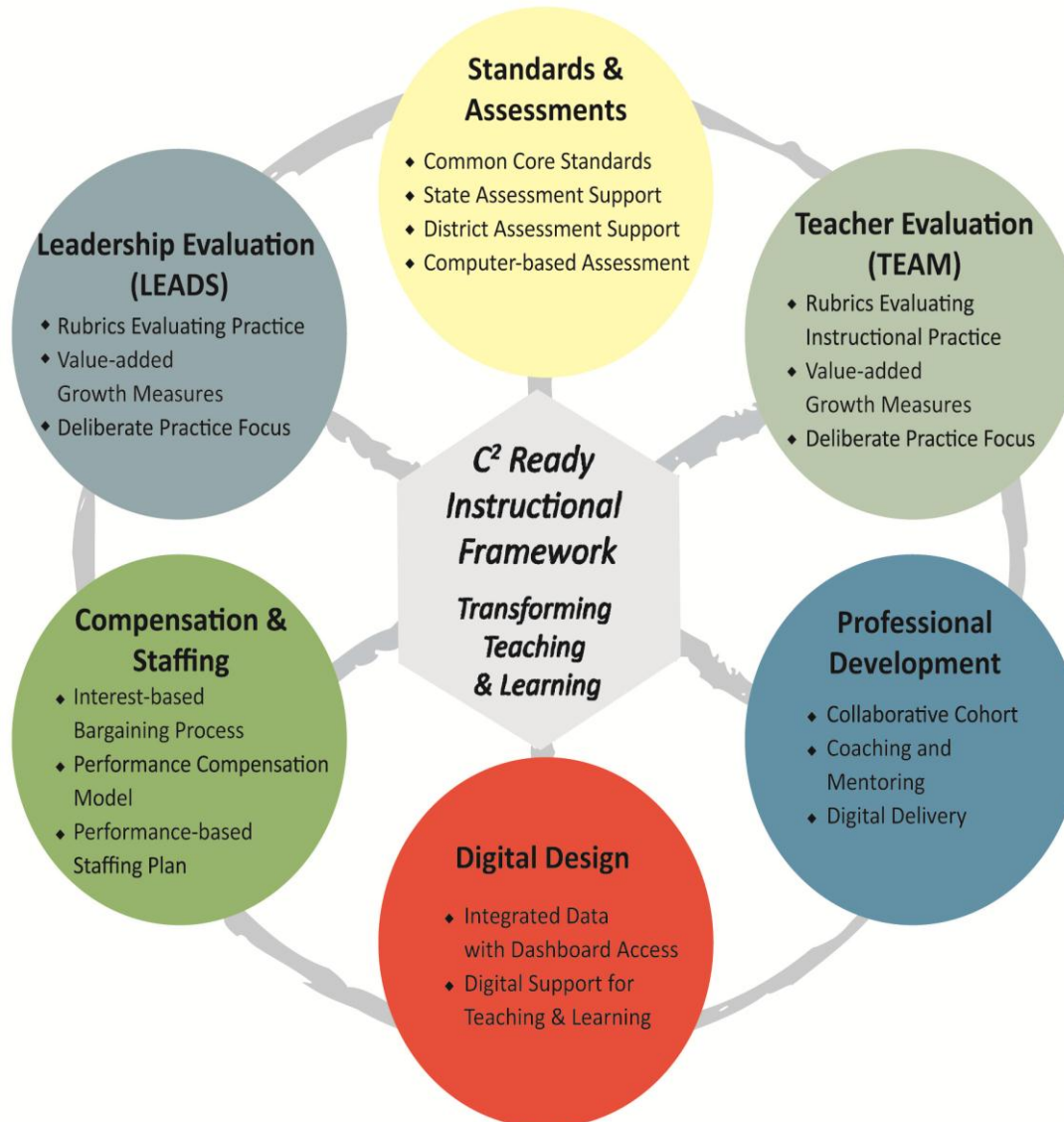


ENGAGELCS

Aligning resources to develop highly effective teachers and leaders, and support key initiatives will advance the goal of developing “C² Ready” students.



EngageLCS builds on our C² Ready Instructional Framework's components



Lake County Schools is 1 of 4 school districts nationally chosen for the \$1.2M project

The goal of the grant is to align resources to increase student achievement.

The project will develop a three-year strategic finance plan that will focus on instructional priorities.

EngageLCS will increase the ability of Lake County Schools to spend money smarter — so that every dollar is being used to support the community's educational vision and priorities.



Four instructional priorities will drive our work

Compensation & Staffing

Create a talent development pipeline for teachers and leaders

Professional Development

Implement a coaching framework for teacher and principal induction and instructional coaches

Technology

Establish personalized learning through digital support for teacher/leader professional development and student instructional delivery

Teaching & Learning

Implement an innovation process to initiate and extend promising initiatives



Compensation and Staffing

The need

Lake County Schools does not reward teachers for excellence in the classroom, nor does it recognize that some instructional positions require different skill sets. The compensation system for LCS is a one-size-fits-all approach. We know this approach with students does not support increased student achievement, nor does it recognize teacher quality.

How this priority addresses that need

Creates a talent development pipeline for teachers and leaders that has transparent pathways, coordinated programs and clear processes; along with a compensation system incorporating a career ladder focus to support instructional excellence



Professional Development

The need

We know new teachers need focused and intense support during the first two years of their induction into teaching in order to support academic achievement and to retain our best talent.

Our principals, as the instructional leaders of our schools, are central to our students' achievement. However, Lake County has no funding and no formal support system for coaching new principals.

How this priority addresses that need

Implements an instructional coaching framework for teacher and principal induction, and district instructional coaches: Provides new teachers and principals with coaches for two years to support increased student achievement and retain them, and establishes a district-wide framework for developing instructional coaches so they use consistent approaches to increase teacher effectiveness



Technology

The need

Across our schools, our students have a wide variety of starting positions in terms of academic achievement. We know a one-size-fits-all approach does not serve students or teachers. We also know that by using technology smartly in the classroom, we can tailor our approach to the academic needs of students and the developmental needs of teachers. In doing both, we have the opportunity to increase student achievement.

How this priority addresses that need

Establishes personalized learning using digital support for teacher / leader professional development and student instructional delivery by creating a comprehensive, integrated system with multiple access points



Teaching & Learning

The need

We have implemented numerous programs aimed at enhancing student learning and achievement. Are these programs achieving the objectives we have put in place? Are they as good or better than any other available program aimed to achieve the same outcome? Looking ahead to new programs, do we have an evaluation method that will allow us to make the best decision about whether, how much, and for how long to fund them?

How this priority addresses that need

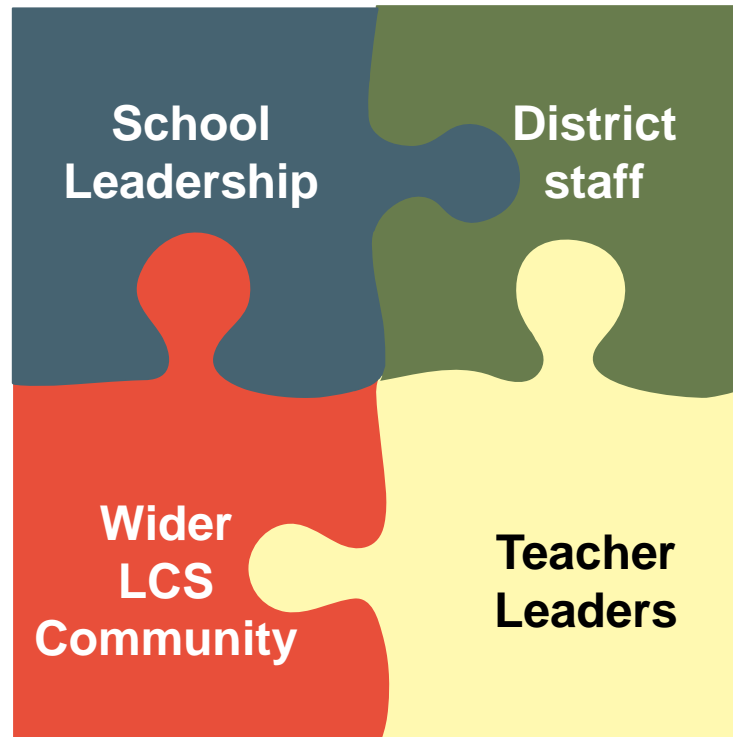
Implements an Innovation process to initiate and extend promising initiatives based on effectiveness and capacity to deliver results, one that will put in place a clear, standardized process for monitoring, evaluating and managing innovative programs both in and outside of the classroom. This process will ensure that innovations that are not working are refined or stopped, and promising innovations are given the resources to grow



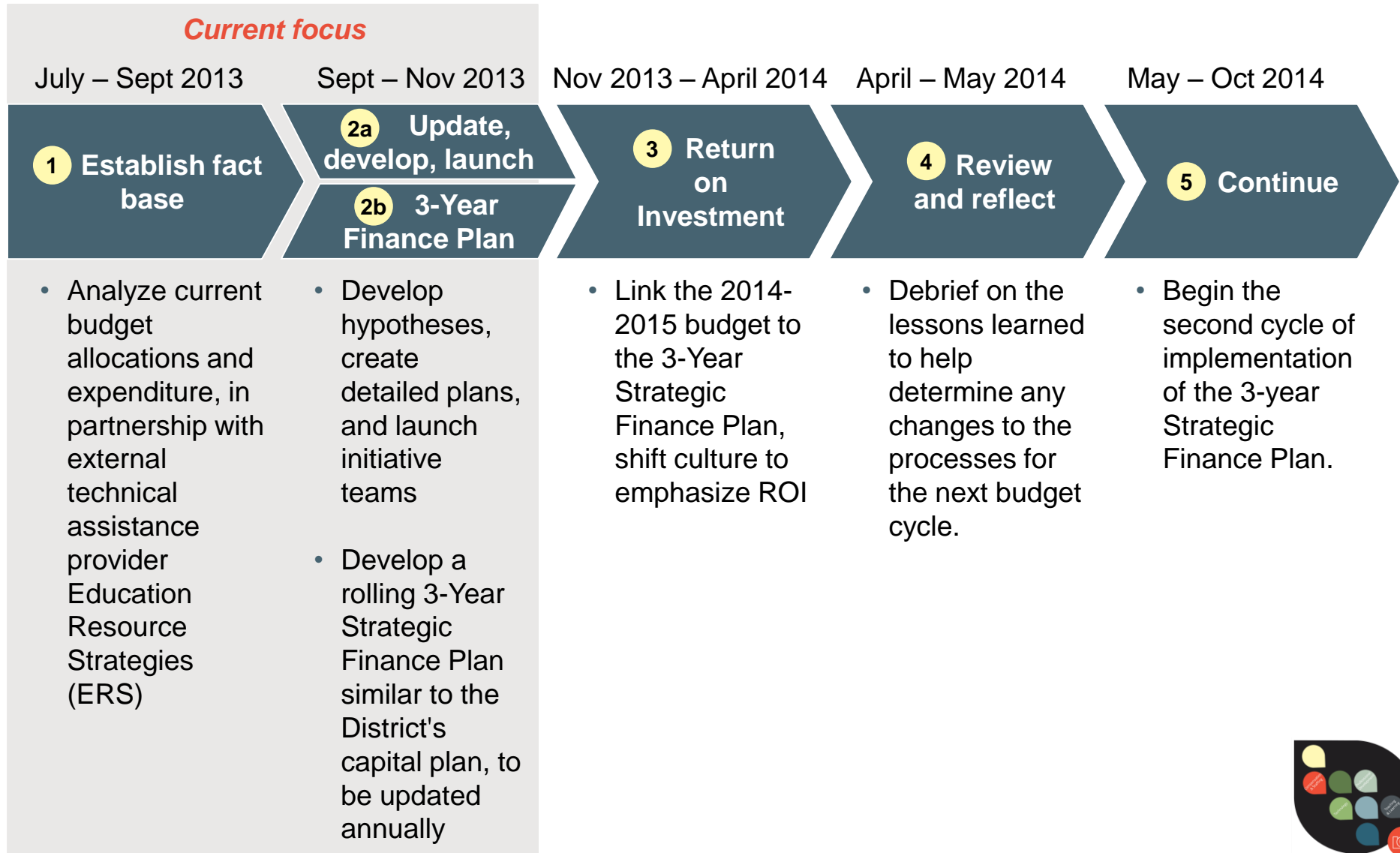
EngageLCS is assessing information from several sources and stakeholder groups to inform decision-making



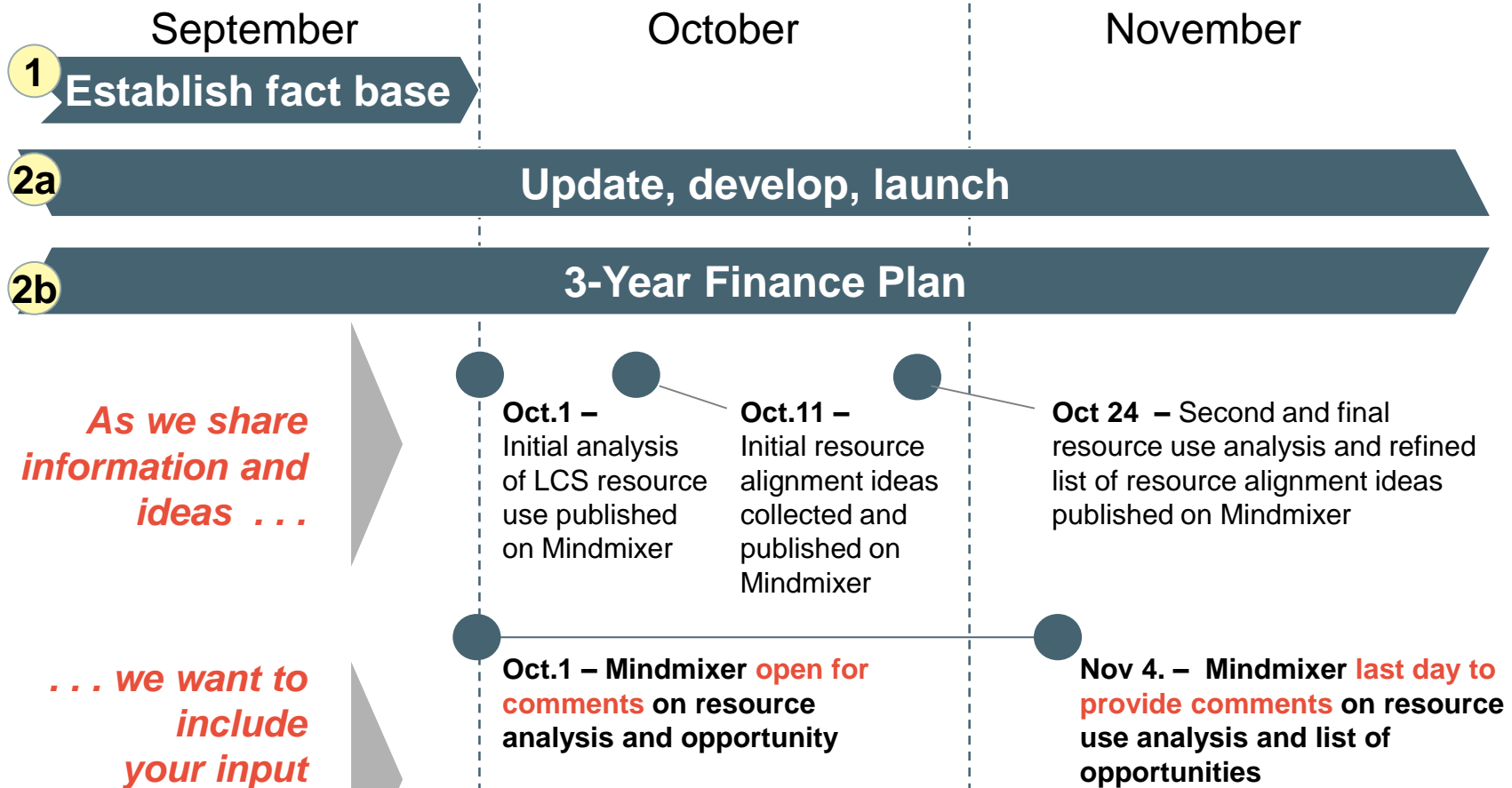
Over 70 individuals from schools, the district office, and the community are part of the EngageLCS team



EngageLCS is taking place in five phases over 18 months



As we identify and prioritize resource alignment options, we need your input to produce the best plan possible



Please visit Mindmixer at <http://EngageLCS.mindmixer.com> to share your comments, questions, and ideas



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What is EngageLCS?

Initial analysis of LCS resource use



The information that follows is a first step in a process to identify and realign resources

The data presented here is part of an ongoing study of our use of resources

- The analysis is meant to shine a light on how we are using resources today
- It presents LCS spending alongside that of comparison districts; this comparison does not represent a goal, but an indicator to help us put LCS's resource use in context
- To the extent possible, the data is offered without interpretation

We invite you to provide reactions, questions, and ideas about the data

- A critical part of EngageLCS is being transparent in providing information . . .
- . . . but also getting your feedback and ideas on the information that is shared

This dialogue is a first step toward developing ideas to realign resources

- EngageLCS will align dollars to our priorities in order to increase student achievement
- To do so, we must find areas where we are not spending money smartly today and align resources from these areas toward our priorities
- This analysis of current spending represents a first step in the process: it sheds light on our spending to help us determine where to seek more information

This data does not provide answers, but rather where we might ask more questions about our resource use



Resource mapping process in partnership with Education Resource Strategies

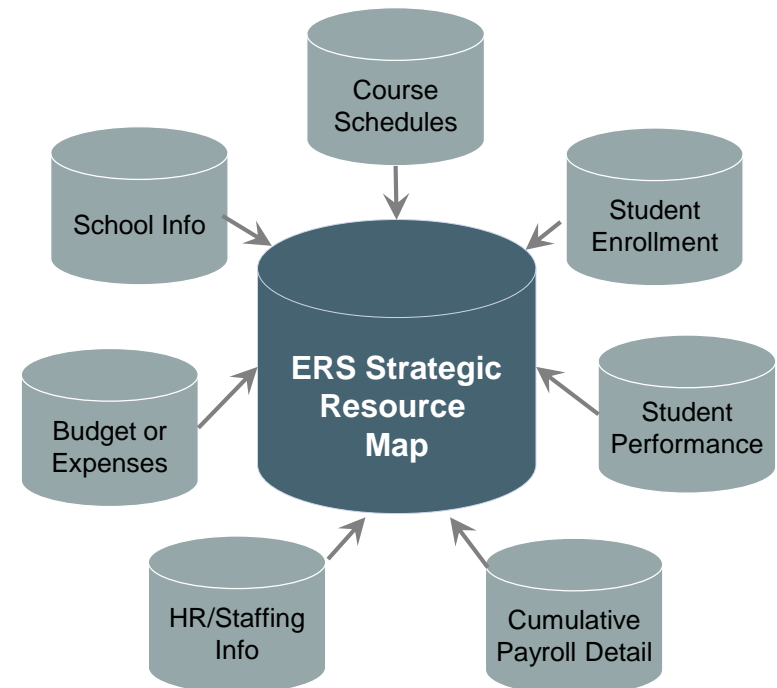
Who is ERS?:

ERS is a non-profit consulting firm with over a decade of experience

- ERS works with leaders of public school systems to rethink the use of district and school-level resources
- ERS' comparison district data extends well beyond publicly available information about how districts use their resources
- ERS' work is grounded in over a decade of experience, working with school districts across the country

What is a resource map?:

Resource map analyzes how resources are used today using various sources



Resource map is one input into understanding if and how resources are aligned with our strategic goals



ERS uses nine main comparison districts in resource map

	District	School year	Enrollment ¹	\$ per pupil spending ²
<u>Main comparison districts:</u> <ul style="list-style-type: none"> Districts with similar per-student spending to Lake Median of these districts' spending levels provide the comparison point to Lake Due to varying availability of data across districts, not every comparison district is included in every analysis that follows 	Lake County, FL	2012–2013	35,754	7,996
	Knox County, TN	2011–2012	57,918	8,198
	Austin, TX	2012–2013	86,512	9,029
	Fulton County, GA	2010–2011	88,309	9,116
	Duval County, FL	2009–2010	120,818	9,178
	Hall County, GA	2010–2011	25,939	9,382
	Prince George's County, MD ³	2012–2013	123,476	9,716
	Marietta, GA	2010–2011	7,833	10,841
	Denver, CO	2009–2010	68,661	10,882
<u>Additional reference:</u> <ul style="list-style-type: none"> Districts with higher per-pupil spending used as reference points for some analyses 	Prince George's County, MD	2009–2010	123,629	11,046
	Baltimore, MD	2009–2010	83,800	13,754
	Cleveland, OH	2012–2013	40,072	14,063
	District of Columbia	2011–2012	44,107	14,993
	Newark, NJ	2010–2011	37,616	18,332

1. figure excludes charter and adult education students 2. Refers to per pupil expenditure from PK-12 operating budget only; expenditure adjusted for geography (cost of living) and year to compare to Lake '12-'13 dollars; Prince George's County data collected in two separate years with two significantly different budgets; therefore, data provided represent two different comparison points; Note: Some of above school districts have letter or number grades based on state methodology; however, meaningful comparison across states not available and thus district grades are not included with this data. Source: ERS comparable districts data, LCS data, ERS analysis



Questions explored during resource map exercise

Area	Questions
Overall	<ul style="list-style-type: none">• How do we allocate our resources today?
Compensation	<ul style="list-style-type: none">• How much do we pay our staff?
Operational spending	<ul style="list-style-type: none">• How much of our budget do we spend on operations and in what areas?
Central office	<ul style="list-style-type: none">• How much of our budget do we spend on our central office and in what areas?
Professional development	<ul style="list-style-type: none">• How much of our budget do we spend on professional development?• How many instructional coaches do we have?
# of staff	<ul style="list-style-type: none">• Are our staffing levels for various positions similar to those of other districts?



A note on this analysis and comparison districts

We know from experience that school district budgets are complicated.

Unfortunately, most districts cannot simply and clearly answer the questions explored on the previous slide. Until this deep-dive, Lake County was in this group.

The comparison information used in the deep-dive analysis that follows allows us to accurately compare LCS to other districts.

We understand that the comparisons included would be helpful to have against FL districts.

- We do not have this level of granularity for most other Florida districts.
- Therefore, we cannot make a meaningful and accurate comparison to most Florida districts.
- However, based on publicly available data, we can share that Lake County is 63rd out of 67 districts in Florida for per pupil funding.

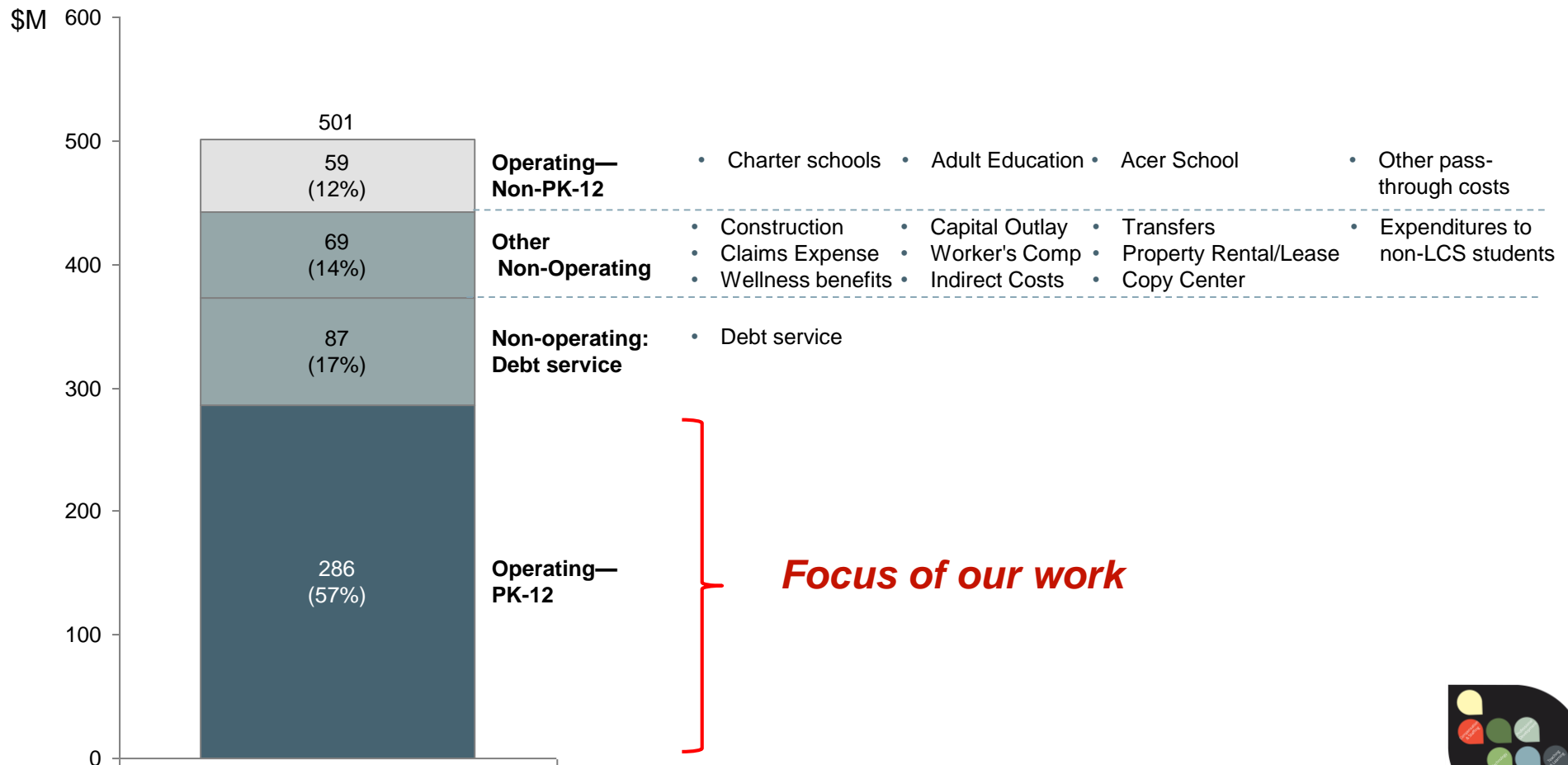
The comparisons we have included are districts that have performed a similar deep-dive into their spending.

- Comparison districts included are **NOT** being shared as models to imitate.
- Medians are **NOT** being shared as goals, simply as data points.



Resource map analysis includes PK-12 operating budget only, representing ~57% of our total budget

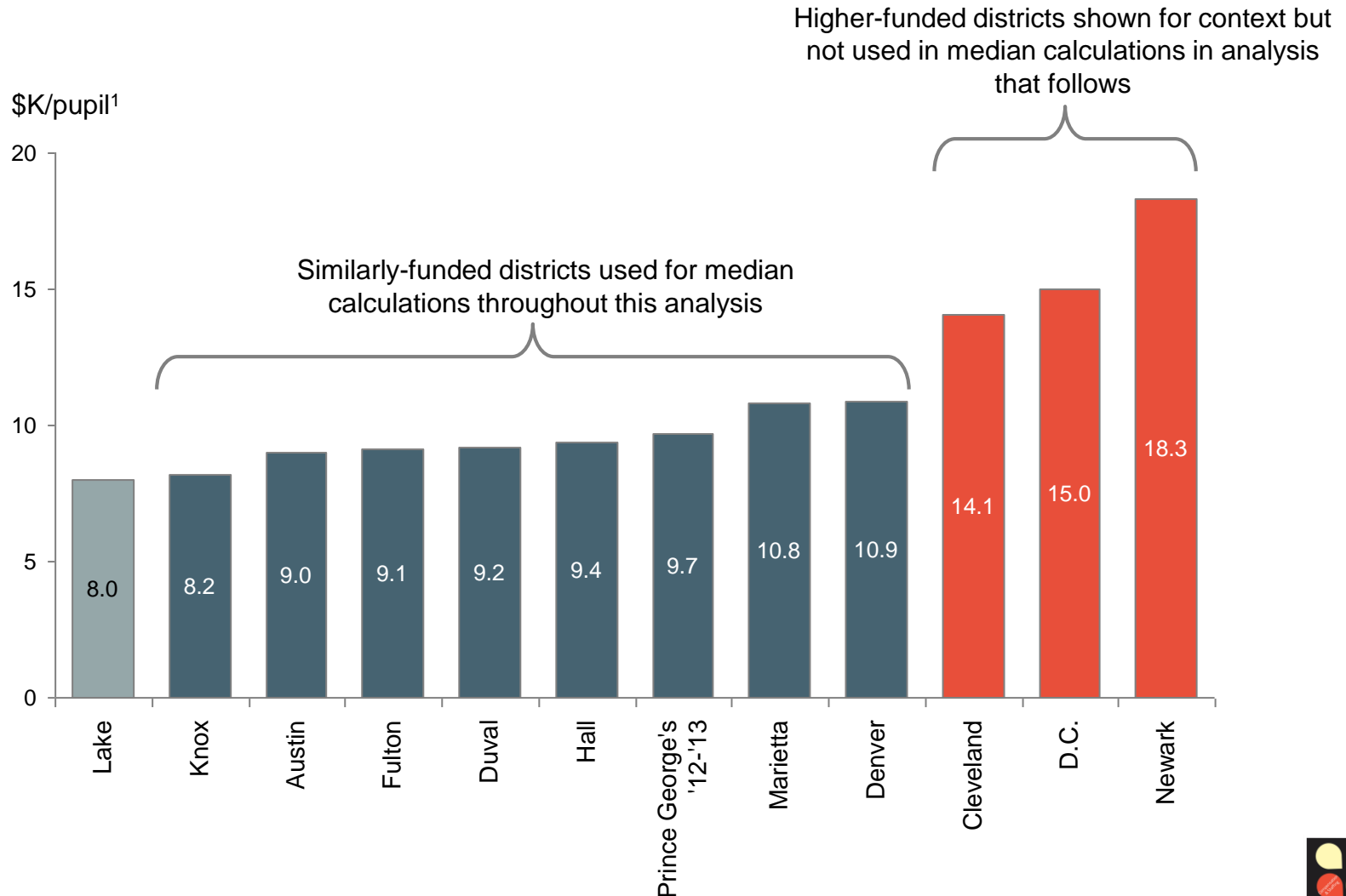
Our priorities and assessment of opportunities focus on PK-12 operating budget only



Source: LCS data, ERS analysis



LCS spend per pupil compared to other districts



1. Expenditure adjusted for geography (cost of living) and year to compare to Lake '12-'13 dollars
Source: ERS benchmark data, LCS data, ERS analysis



LCS spending by category

~81% of LCS's budget spent on staff salary and benefits

	Base Salary/ Comp	Other Comp./ Stipend	Supplies/ Materials	Rent/ Utilities	Contracted Services	Other Non- Compensation ²	Equipment & Equipment Lease	Substitute Compensation	Travel & Conferences
Lake spend (\$M)	222.6	8.3	21.6	13.5	7.4	6.8	3.1	2.0	0.6
Lake % of budget	77.9%	2.9%	7.6%	4.7%	2.6%	2.4%	1.1%	0.7%	0.2%
Comparison districts ¹ % of budget	78.5%	1.5%	5.4%	3.0%	5.0%	1.0%	1.7%	0.9%	0.0%
Difference between Lake and comparison	- 0.6%	1.4%	2.2%	1.7%	- 2.4%	1.4%	- 0.6%	- 0.2%	0.2%

1. Indicates median of comparison districts; comparison districts are: Knox County, Hall County, Fulton County, Denver, Marietta, Prince George's County '12-'13; 2. Includes several categories of expenses including facilities and maintenance, some food services-related expenses, communications-related expenses

Source: ERS comparable districts data, LCS data, ERS analysis

LCS spending by use type

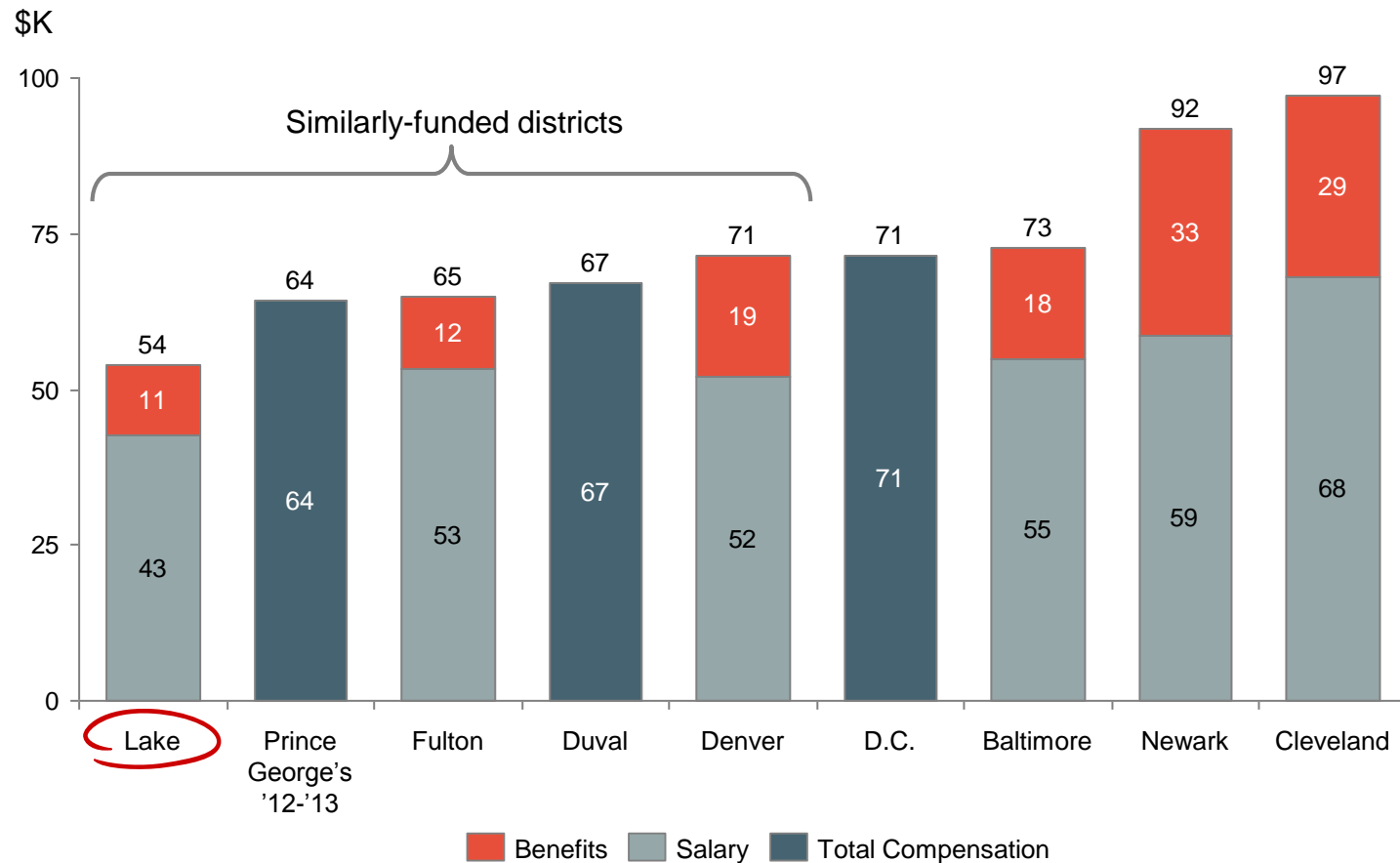
~53% of LCS's budget spent on direct instruction

See Appendix p. 42 for additional detail on spending by use

	Indirect Instruction					
	Direct Instruction	Pupil Services & Enrichment	Instruction Support & Prof. Dev.	Leadership	Operations & Maintenance	Business Services
Lake spend (\$M)	150.0	19.6	16.9	22.3	62.8	11.0
Lake % of budget	53.1%	6.9%	6.0%	7.9%	22.2%	3.9%
Comparison districts ¹ % of budget	58.0%	8.1%	5.6%	7.7%	18.3%	3.4%
Difference between Lake and comparison	-4.9%	-1.2%	0.4%	0.2%	3.9%	0.5%

1. Indicates median of comparison districts; comparison districts are: Knox County, Duval, Hall County, Fulton County, Austin, Denver, Marietta, Prince George's County '09-'10 and '12-'13; Source: ERS comparable districts data, LCS data, ERS analysis

Average teacher compensation (salary plus benefits)

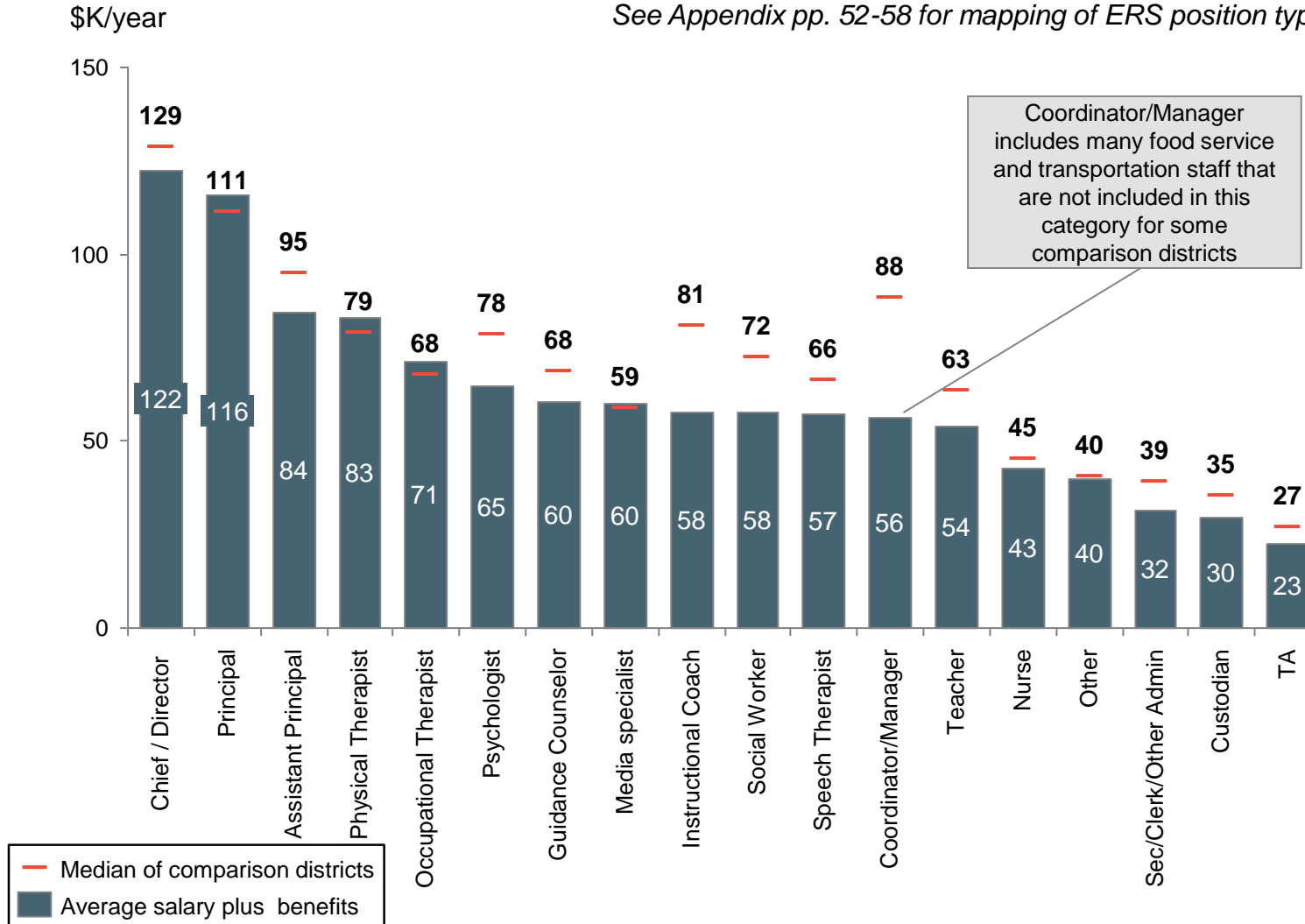


Note: Compensation figures geo/year adjusted; accounts for all revenue sources including grants
Source: ERS benchmarks, LCS data, ERS analysis



Average salary plus benefits by position

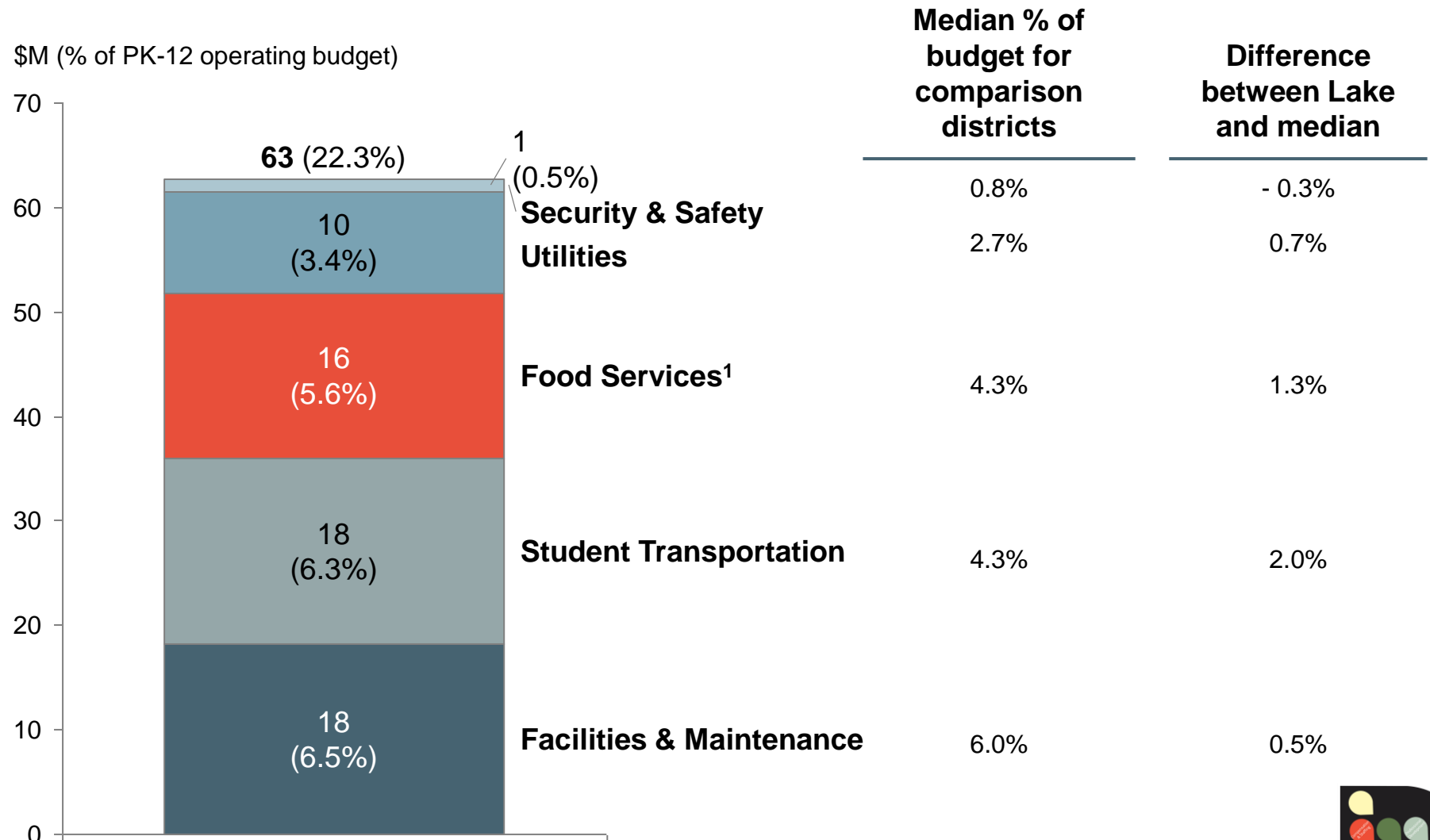
See Appendix pp. 52-58 for mapping of ERS position types to LCS titles



Note: \$ figures based on pure averages (dividing total spend by the # of FTEs for each position); Comparison districts: Knox County, Hall County, Fulton County, Austin, Prince George's County; Source: ERS comparable district data, LCS data, ERS analysis



Breakdown of operational spending



1. Food Services is largely federally funded and thus not considered a feasible lever for realignment; Note: Knox County, Duval County, Hall County, Fulton County, Denver, Marietta, Austin, Prince George's County '09-'10 and PG '12-'13 included in median calculations
Source: ERS benchmarks, LCS data, ERS analysis

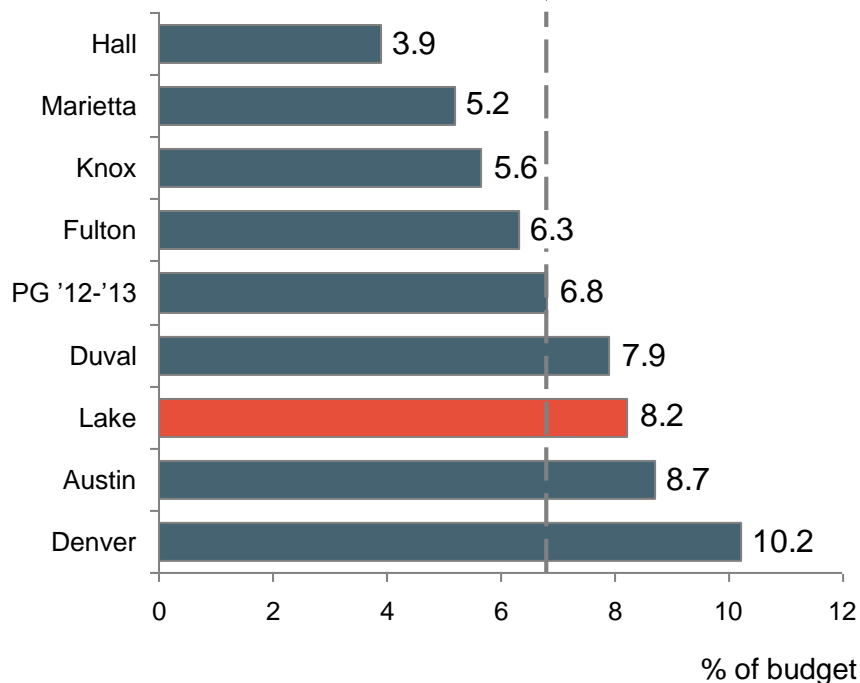


Central office spend

% of budget and \$ per student views

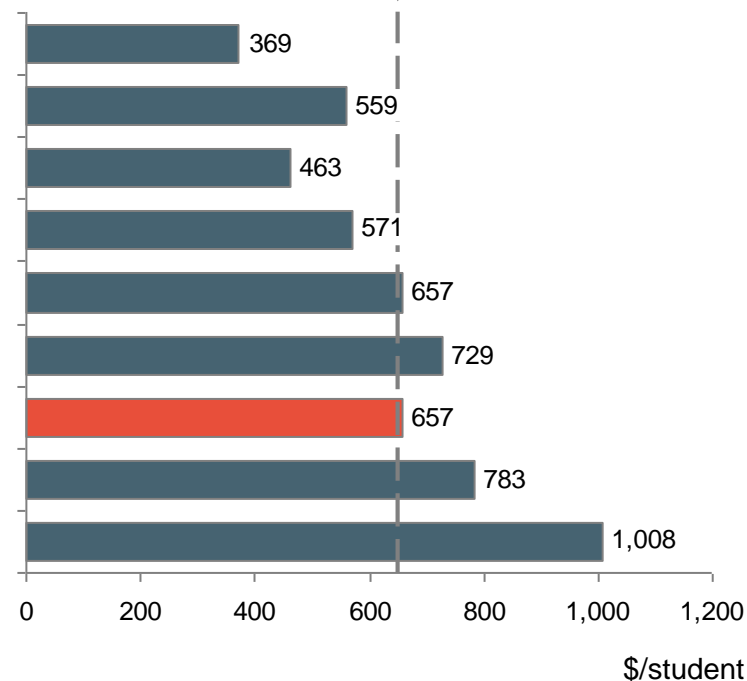
Central office¹ spend represented as % of budget

Median of comparison districts: 6.8%



Central office spend represented as \$ per student

Median of comparison districts: \$657



Understanding the difference between these two graphs: LCS has a smaller overall "pie"— budget -- than comparison districts, so each \$1 spent is a larger fraction of LCS's pie than \$1 spent in another district is as a fraction of that district's larger pie (E.g., \$657 is 8.2% of LCS's budget, while \$729 is only 7.9% of Duval's budget)

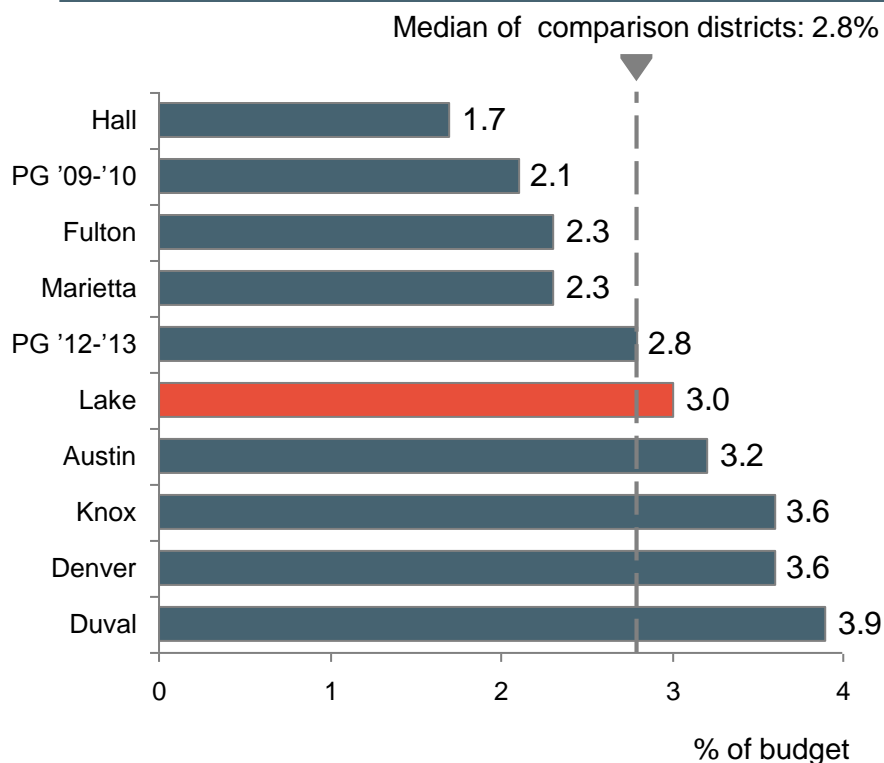
1. Central office defined as non-school expenses; items that are budgeted centrally but take place at schools are excluded. Source: ERS comparable districts data, LCS data, ERS analysis



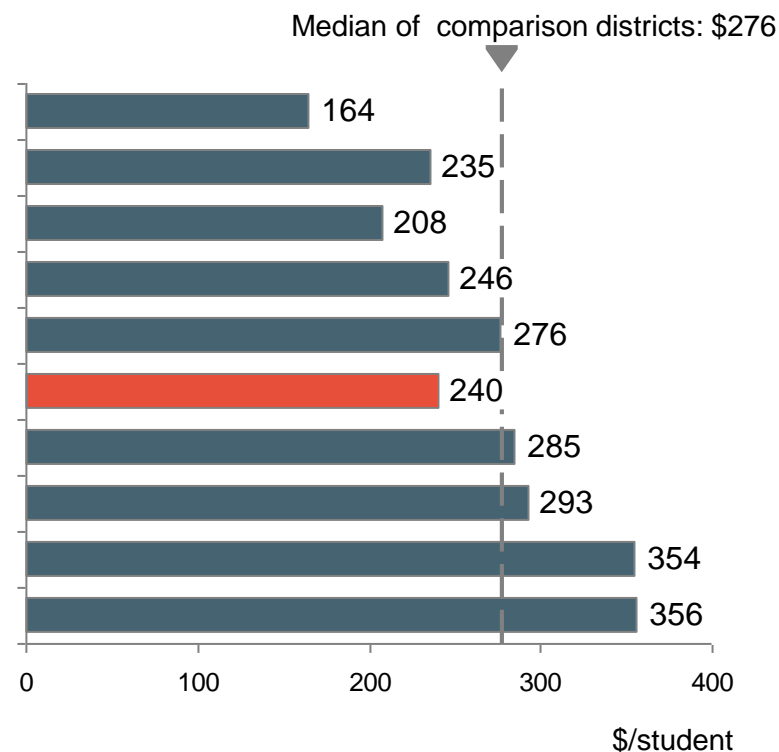
Professional development spend

% of budget and \$ per student views

Professional development spend represented as % of budget



Professional development spend represented as \$ per student



Understanding the difference between these two graphs: LCS has a smaller overall "pie"— budget -- than comparison districts, so each \$1 spent is a larger fraction of LCS's pie than \$1 spent in another district is as a fraction of that district's larger pie (E.g., \$240 is 3.0% of LCS's budget, while \$276 is only 2.8% of PG's '13 budget)



Instructional coach staffing levels

See Appendix pp. 46-48 for more information on instructional coaches

	District	Teachers (#) ¹	Instructional Coaches (#) ²	Teacher-Coach Ratio
●	Hall	1,651	23	72:1
	Cleveland	2,543	54	47:1
●	Fulton	5,991	139	43:1
●	Austin	5,838	168	35:1
●	Knox	4,304	127	34:1
●	Denver	4,085	130	31:1
●	Prince George's Cty '12-'13	7,735	290	27:1
	Lake	2,294	96	24:1
●	Duval	8,001	429	19:1
	Newark	3,005	184	16:1
	D.C.	3,505	221	16:1

● = comparable district

1. Teachers include staff who deliver direct instruction and who have "teacher" in their titles; numbers rounded 2. number of coaches rounded
Source: ERS comparable districts data, LCS data, ERS analysis



Ratio of staff to one thousand students by position

See Appendix pp. 52-58 for additional detail on staffing levels and mapping of ERS position types to LCS titles

	Lake ratio	Median ratio of comparison districts	Difference between Lake ratio and median
Secretary / Clerical	9.2	6.2	3.1
Coordinator/Manager	3.6	1.5	2.1
Custodian ⁴	9.2	7.4	1.8
Other	24.9	23.4	1.5
Guidance Counselor	2.7	1.9	0.8
Instructional Coach	2.7	1.9	0.8
Psychologist	0.5	0.4	0.1
Assistant Principal ¹	2.3	2.2	0.1
Chief / Director ²	0.6	0.5	0.1
TA	12.0	12.0	0.0
Speech Therapist	0.8	0.9	0.0
Nurse	0.9	0.9	- 0.1
Physical Therapist	0.1	0.1	- 0.1
Social Worker	0.3	0.4	- 0.1
Occupational Therapist	0.2	0.3	- 0.1
Media Specialist ³	1.2	1.3	- 0.1
Principal	1.1	1.4	- 0.2
Teacher	64.2	67.5	- 3.3

Coordinator/Manager and Other positions include many food service and transportation staff that are not included in this category for some comparison districts

1. Aligns to role of Vice Principal in comparison districts, per ERS coding methodology 2. Aligns to role of (Exec.) Director in comparison districts, per ERS coding methodology.
 3. Aligns to role of Librarian in comparison districts, per ERS coding methodology 4. Head Custodian role aligns with "Custodian" as opposed to "Coordinator/Manager"



Summary of learnings (I)

Area	Questions	What we learned	Further information (pp.)
Overall	<ul style="list-style-type: none"> How do we allocate our resources today? 	<ul style="list-style-type: none"> LCS spends less per student than comparison districts 81% of the district's spending is on people (salary and benefits) 53% of district's budget spent on direct instruction 	21 – 24, 42
Compensation	<ul style="list-style-type: none"> How much do we pay our staff? 	<ul style="list-style-type: none"> LCS compensation is lower than comparison districts for most positions, including teachers 	25 – 26, 43
Operational spending	<ul style="list-style-type: none"> How much of our budget do we spend on operations? 	<ul style="list-style-type: none"> Approximately 22.3% of our budget is spent on operations, mostly in food service, transportation, and facilities & maintenance 	27, 44 – 45
Central office	<ul style="list-style-type: none"> How much of our budget do we spend on our central office? 	<ul style="list-style-type: none"> Overall central office spending as a % of operating budget is higher than other districts \$ per student spend on central office is on par with comparison districts 	28, 44 – 45



Summary of learnings (II)

Area	Questions	What we learned	Further information (pp.)
Professional development	<ul style="list-style-type: none"> • How much of our budget do we spend on professional development? • How many instructional coaches do we have? 	<ul style="list-style-type: none"> • Professional development spend as a % of operating budget is higher than median of comparison districts • \$ per student spend on professional development is well below the median of comparison districts • LCS has more instructional coaches than median of similar districts 	29 – 30 46 – 49
Number of staff	<ul style="list-style-type: none"> • Are our staffing levels for various positions similar to those of other districts? 	<ul style="list-style-type: none"> • LCS has more custodians, guidance counselors, and administrative assistant / clerical staff than comparison districts 	31, 50 – 51



These learnings will guide us in realigning our resources to the four instructional priorities driving our work

Compensation & Staffing

Create a talent development pipeline for teachers and leaders

Professional Development

Implement a coaching framework for teacher and principal induction and instructional coaches

Technology

Establish personalized learning through digital support for teacher/leader professional development and student instructional delivery

Teaching & Learning

Implement an innovation process to initiate and extend promising initiatives



Next steps

What the EngageLCS team will do

Continue to refine existing analysis of current resource use

Share initial list of realignment opportunities collected from your input as well as input from the Engage LCS team on Mindmixer on October 11

Assess current list of potential realignment opportunities based on interviews, research, and your feedback

Release next and final resource use analysis and refined list of alignment opportunities on Mindmixer on October 24

What you can do

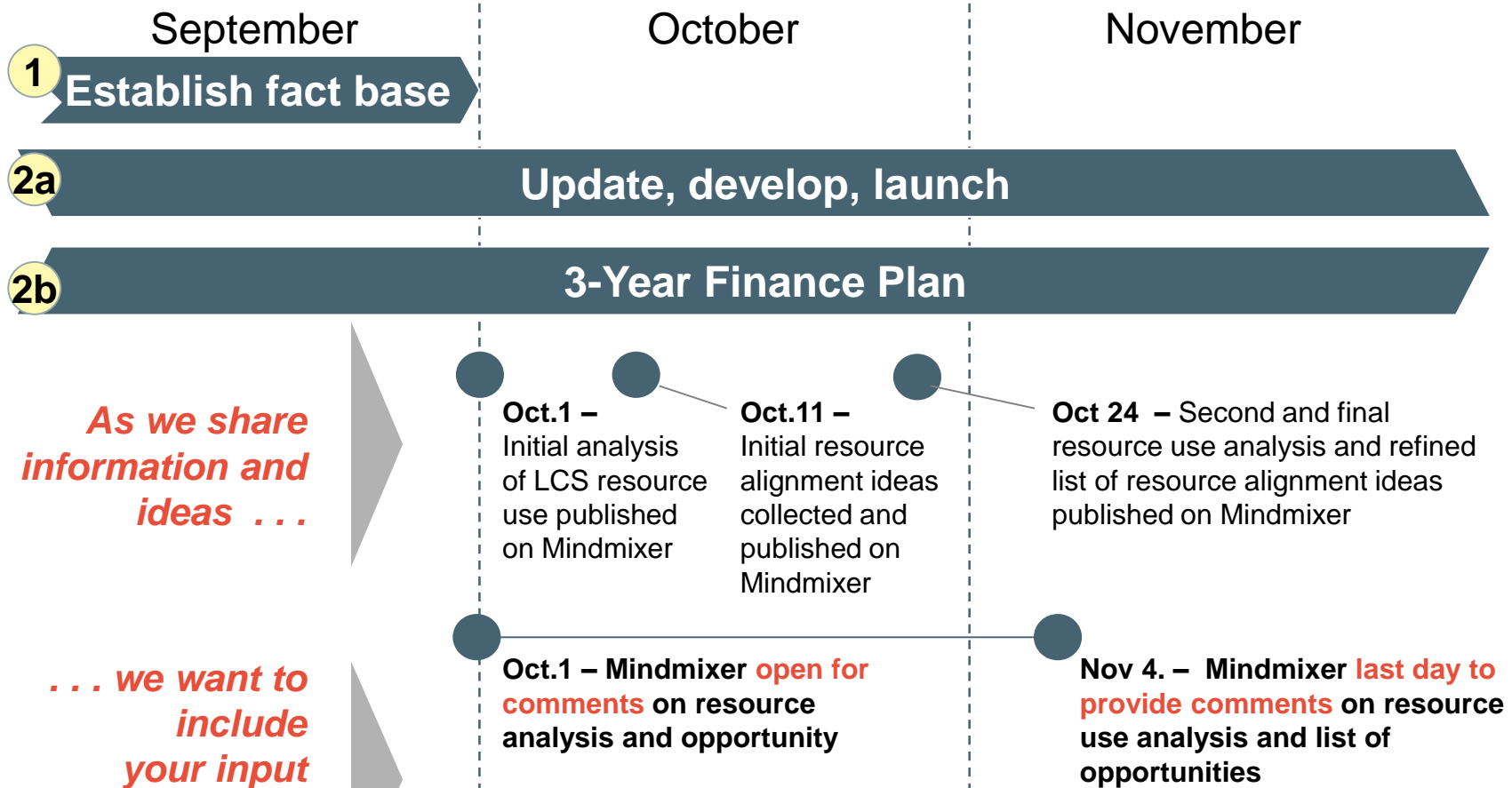
Engage in conversation with others in the Mindmixer community

Provide your feedback via Mindmixer on the ideas presented in these materials

Continue the dialogue: discuss with your peers and colleagues, and share your conclusions, including through town halls



Recall: We need your input, this is the first piece of a many step project to improve our district



Please visit Mindmixer at <http://EngageLCS.mindmixer.com> to share your comments, questions, and ideas



Appendix



Over 70 individuals from schools as well as district offices are working to implement our instructional priorities (I)

Project oversight & management working groups

Leadership Team

Susan Moxley, Superintendent (Lead)
Carol MacLeod, Chief Financial Officer
Laurie Marshall, Executive Director of HR
Creed Wheeler, Executive Director of IT
Aurelia Cole, Chief of Administration
John Davis, Chief of Operations
Marilyn Doyle, Sr. Director Academic Services
Chis Patton, Communications Officer

Employee Advisory group

Brent Balkaran, Teacher
Kelly Cousineau, Teacher
Nancy Hunter, Teacher
April Von Maxey, Teacher
Andrea Pyatt, Teacher
Debra Snow, Teacher
Stuart Klatte, LCEA Leader
Gina Leake, ESE
Rosanne Rodriguez, ERMS
Deborah Burns, SSES
Alfonzo Baptiste, EHES
Vivian Marie Mauldin, Transportation
James Nathan Battle, IT
Jeff Stephens, Maintenance
Carol Brewer, Triangle
Lauren Deridder, County Office
Wayne Kicklighter, Maintenance
Pam Hayes, Procurement Services
Glen Reubelt, IT
Kim Cronin, SEIU/FPSU

Community Advisory group

Susan Moxley, Superintendent (Lead)
Brian Payne
Sean Parks
Choice Edwards
Margo S. Odom
Carey Baker
Mike Bucher
Tom Hoffmeister
David Logan
Rob English
Wendy Simpson
Ted Wolfe
James Smith

Communications & Stakeholder Engagement group

Chris Patton, Communications Officer (Lead)
Liz Hobert, Coordinator Special Projects
William Roberts, ERMS Assist. Principal
Jon Redding, ASU Online Specialist
Kim Updike, SLHS Assist. Principal
Heather Gelb, GLES Assist. Principal
Kelly Lafollette, Communications Director, Lake County
Kelda Senior, City of Mount Dora
Kim Couch, Orlando Health
Brian Payne, LCS Community Liaison



Over 70 individuals from schools as well as district offices are working to implement our instructional priorities (II)

Initiative Working Groups

Cost and ROI working group

Carol MacLeod, Chief Financial Officer (Lead)
Kathleen Thomas, Director Planning, Evaluation and Accountability (Lead)
Maureen Slovak, Budget and FTE Manager
Marilyn Doyle, Sr. Director Academic Services
Creed Wheeler, Executive Director IT
Harry Fix, Growth Planning Director
Janice Boyd, THS Principal
Teresa Lachut, Finance-FTE Analyst
Linda Douglas, Finance—Sr. Accounting Spec.)

School staffing process group

Laurie Marshall, Executive Director of HR (Lead)
Carol MacLeod, Chief Financial Officer
Doreathe Cole, GLE Principal
Kelly Sanders, UMS Principal
Bill Miller, LHS Principal
Julie Lueallen, ERHS Principal
Charlie McDaniel, ERMS Principal
Judy Miller, ESE Director
Maggie Teachout, Director of Career, Adult & Community Education
Sabrina Dillon-Banks, Safe Schools Coordinator
Lynn Collins, Position Control Analyst

Budget planning group

Carol MacLeod, Chief Financial Officer (Lead)
(Support—Finance Staff)
Susan Moxley, Superintendent
Aurelia Cole, Chief of Administration
John Davis, Chief of Operations
Laurie Marshall, Executive Director of HR
Creed Wheeler, Executive Director of IT
Marilyn Doyle, Sr. Director Academic Services
Chris Patton, Communications Officer
Durenda McKinney, LES Principal
David Cunningham, EMS Principal
Rob McCue, SLHS Principal

Innovation process design & implementation group

Marilyn Doyle, Sr. Director Academic Services (Lead)
Creed Wheeler, Executive Director IT
Kathy Halbig, Manager of Innovative Learning
Kathleen Thomas, Director Planning, Evaluation & Accountability
Kathlene Jarvis, Director of Curriculum & Instruction
Dave Bordenkircher, VES Principal
Will Davis, GIS Manager
Denise Coit, Director of Finance
Julie Robinson-Lueallen, ERHS Principal
Jan Tobias, Director of Student Services
Maggie Teachout, Director of Career, Adult & Community Education & Charter School Liaison



Over 70 individuals from schools as well as district offices are working to implement our instructional priorities (III)

Instructional Priorities Working Groups

Coaching Framework:

Strategic Planning group

Susan Moxley, Superintendent (Lead)
Laurie Marshall, Executive Director of HR
Marilyn Doyle, Sr. Director Academic Services
Stacey Roberts, Director PD and Leadership
Liz Bourdon, Director Federal Programs
Kathy Halbig, Manager of Innovative Learning
Kati Pearson, Director of Teaching and Learning
Chris Patton, Communications Officer
Liz Hobert, Coordinator Special Projects

Teacher Induction/Training for Instructional Coaches

Kati Pearson, Director of Teaching and Learning (Lead)
Stacey Roberts, Director PD and Leadership
Liz Bourdon, Director Federal Programs
Kathy Halbig, Manager of Innovative Learning
Randy Campbell, UHS Principal
Andrea Guogas, Project Manager Evaluation and Compensation
Noris Aguayo, New Teacher Coach
Elizabeth Feld, New Teacher Coach
Theresa Frisby, New Teacher Coach
Melonee Ferguson, New Teacher Coach
Lisa Sabino, New Teacher Coach

Principal Induction

Aurelia Cole, Chief of Administration (Lead)
Laurie Marshall, Executive Director of HR
Carolyn Samuel, Director of HR
Stacey Roberts, Director PD and Leadership
Linda Shepherd, LMHS Principal
Melissa DeJarlais, FPES Principal

Personalized Learning group

Kathy Halbig, Manager of Innovative Learning (Lead)
Creed Wheeler, Executive Director of IT
Ashley Solomon, ILS
Missy Broker, ILS
Stacey Roberts, Director of PD and Leadership
Kathy Keck, Grant Specialist
Nancy Velez, EHS Principal
Julie Robinson-Lueallen, ERHS Principal
Amy Cockcroft, WHMS Principal
Julio Valle, SBES Principal
Andrea Pyatt, ASU Program Specialist
Brent Balkaran, THS Teacher
Kati Pearson, Director of Teaching and Learning
Cleta Stutzman-Horton, LLE
Dennis Doherty, WHMS

Talent development pipeline group

Andrea Guogas, Project Manager Evaluation and Compensation (Lead)
Laurie Marshall, Executive Director of HR
Aurelia Cole, Chief of Administration
Doug Kroulik, Supervisor of Compensation
Linda Shepherd, LMHS Principal
Melissa DeJarlais, FPES Principal
Stuart Klatte, LCEA Leader
Stacey Roberts, Director of Professional Development and Leadership
Maggie Teachout, Director of Career, Adult & Community Education
Michelle Hoppenstedt, HR Tech & Support Mgr.
Maureen Slovak, Ad Hoc Member



To ensure sound comparisons, budgets from other districts are adjusted for local cost of living and inflation

ERS multiplies an inflation index by a wage index to create a total adjustment factor for each district, and then scales all dollar amounts up or down according to that factor to match Lake dollars.

District	Unadjusted \$/pupil	Inflation Index	Comparable Wage Index	Adjustment Factor	To convert to Lake \$s, divide by	LCS-adjusted \$/pupil
Lake	\$7,996	229.54	1.2084	277.44	-	\$7,996
Duval	\$8,419	214.537	1.1862	254.48	0.91	\$9,302
D.C.	\$18,899	224.939	1.5539	349.53	1.26	\$14,993

D.C.'s ***inflation index*** is less than Lake's since our D.C. project occurred using '11-'12 data, whereas Lake's dollars are '12-'13 dollars. Source: Bureau of Labor Statistics



D.C.'s ***CWI*** is higher than Lake's since the cost of living is higher in the nation's capital. Source: National Center for Education Statistics

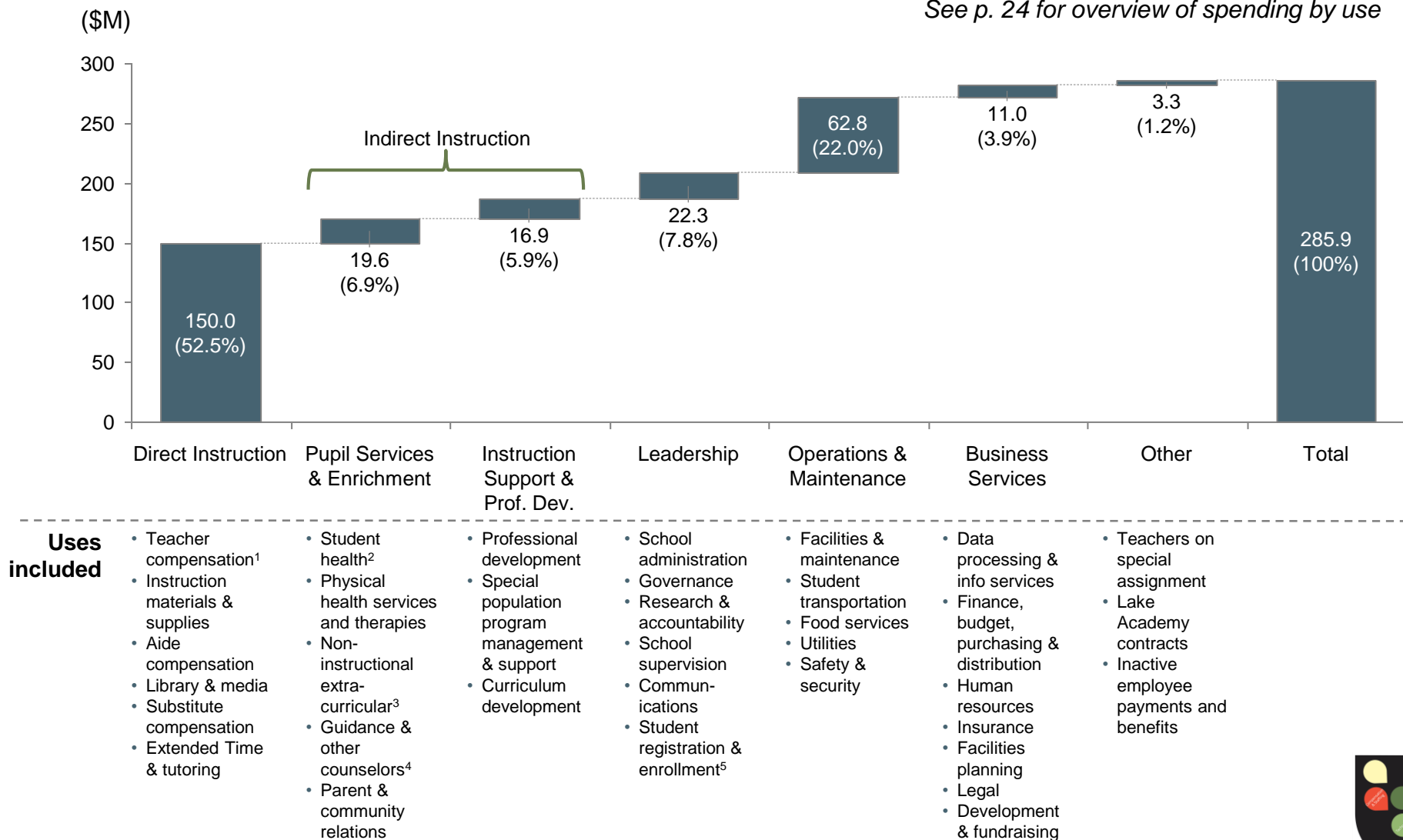


Overall, D.C. '11-'12 has a larger ***adjustment factor*** than Lake '12-'13, so dollars will be scaled down when moving from D.C. dollars to Lake ones.



LCS budget by use

See p. 24 for overview of spending by use



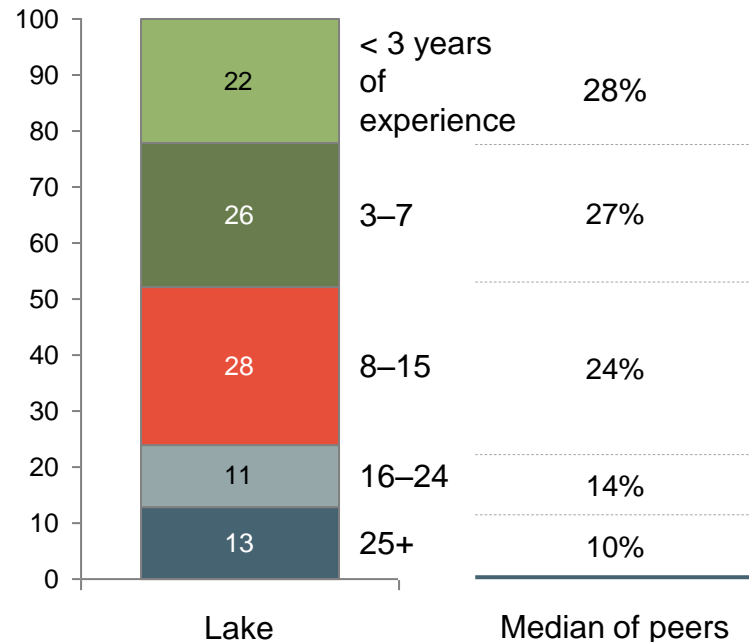
1. Includes base benefits package 2. Includes nurses, itinerant and speech therapists, student health programs, etc. 3. Coded by ERS as "Enrichment" 4. Coded by ERS as "Career Academic Counseling" 5. Coded by ERS as "Student assignment" Source: ERS benchmark data, LCS data, ERS analysis



LCS teaching staff makeup by tenure and average salary

LCS teaching staff is not less tenured than peers ...

Full Time Employees (%)



... but salary increases in low to moderate increments

Years of experience	Average salary (\$K) ¹
<3	35.7
3–7	36.9
8–15	39.3
16–24	44.8
25+	55.1

Based on this schedule, a teacher with 20 years of experience earns average ~\$45K per year

1. Weighted average of salaries of employees included in group

Note: Districts included in median calculation: Fulton County, Duval County, Prince George's County, Denver. Source: LCS data, ERS analysis, BCG analysis



Central office expenditures by use and function

\$ per student

Use and functions	Lake (\$ per student)	Median of comps (\$ per student)	Δ from Median (\$ per student)
Business Services	\$294	\$275	\$19
• Data Processing & Information Services	86	92	-6
• Finance, Budget, Purchasing & Distribution	73	70	3
• Human Resources	63	58	5
• Insurance	29	10	19
• Facilities Planning	16	—	16
• Legal	14	10	4
• Development & Fundraising	12	4	8
Instruction Support & Prof. Dev.	157	126	31
• Special Population Program Mgmt & Support ¹	83	46	37
• Professional Development	42	21	21
• Curriculum Development	31	49	-18
Leadership	100	113	-13
• Governance	45	38	7
• Research & Accountability	35	33	2
• School Supervision	14	32	-18
• Communications	4	11	-7
• Student Assignment	1	9	-8
Operations & Maintenance	77	82	-5
• Facilities & Maintenance	29	37	-8
• Utilities	20	18	2
• Security & Safety	15	8	7
• Student Transportation	7	18	-11
• Food Services	7	14	-7
Pupil Services & Enrichment	27	31	-4
• Social & Emotional	12	6	6
• Career & Academic Counseling	8	1	7
• Parent & Community Relations	3	5	-2
• Physical Health Services & Therapies	2	3	-1
• Enrichment	1	1	0

1. Also a School-based expenditure; Note: Districts included in median calculation: Knox County, Hall County, Fulton County, Duval County, Austin, Prince George's County '09-'10 and '12-'13, Denver, Marietta. Source: ERS benchmark data, LCS data, ERS analysis

Central office expenditures by use and function

% of central office PK-12 operating budget

Use and functions	Lake (% of budget)	Median of comps (% of budget)	Δ from Median (% of budget)
Business Services	45%	44%	1%
• Data Processing & Information Services	13%	15%	-2%
• Finance, Budget, Purchasing & Distribution	11%	11%	0%
• Human Resources	10%	9%	0%
• Insurance	4%	2%	3%
• Facilities Planning	3%	0%	3%
• Legal	2%	2%	1%
• Development & Fundraising	2%	1%	1%
Instruction Support & Prof. Dev.	24%	20%	4%
• Special Population Program Mgmt & Support ¹	13%	7%	5%
• Professional Development	6%	3%	3%
• Curriculum Development	5%	8%	-3%
Leadership	15%	18%	-3%
• Governance	7%	6%	1%
• Research & Accountability	5%	5%	0%
• School Supervision	2%	5%	-3%
• Communications	1%	2%	-1%
• Student Assignment	0%	2%	-1%
Operations & Maintenance	12%	13%	-1%
• Facilities & Maintenance	5%	6%	-1%
• Utilities	3%	3%	0%
• Security & Safety	2%	1%	1%
• Student Transportation	1%	3%	-2%
• Food Services	1%	2%	-1%
Pupil Services & Enrichment	4%	5%	-1%
• Social & Emotional	2%	1%	1%
• Career & Academic Counseling	1%	0%	1%
• Parent & Community Relations	1%	1%	0%
• Physical Health Services & Therapies	0%	1%	0%
• Enrichment	0%	0%	0%

1. Also a School-based expenditure; Note: Districts included in median calculation: Knox County, Hall County, Fulton County, Duval County, Austin, Prince George's County '09-'10 and '12-'13, Denver, Marietta. Source: ERS benchmark data, LCS data, ERS analysis

Makeup of professional development spend by object

~87% of professional development spend is compensation and benefits

Object type	Total expenditure (\$K)	Professional development spend (%)
Base Salary/Com	6,320	73.6
Other Comp/Stipend	1,182	13.8
Benefits	3	0.0
Supplies/Materials	386	4.5
Contracted Services	298	3.5
Travel & Conferences	232	2.7
Equip. & Equip. lease	87	1.0
Other Non-comp	41	0.5
Substitute comp	22	0.3
Rent/Utilities	8	0.1
Grand Total	\$8,581	100.0 %

~87%

See Appendix p. 58 for instructional coach positions

Instructional coaches comprise majority of expenditures by position

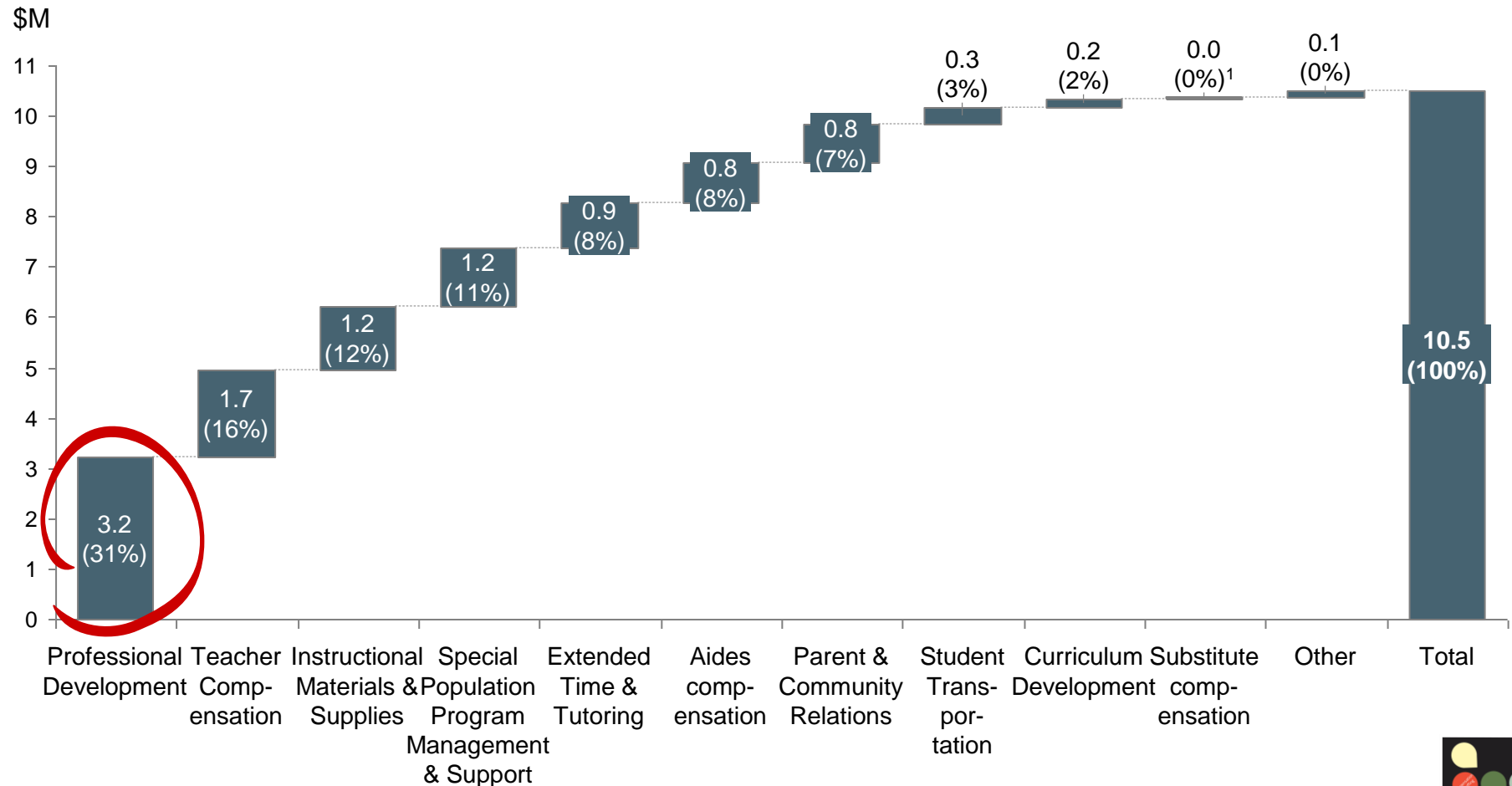
Position	Total expenditure (\$K) ²	# of Full Time Employees
Instructional Coach	5,464	96.3
Other positions ¹	813	11.5
Teacher	686	0.1
Chief/(Exec) Director	152	1.0
Coordinator/Manager	130	1.3
Sec/Clerk/Other Admin	45	1.0
Other non-FTE position-based spend ³	1,291	N/A
Grand Total	\$8,581	111.2

1. Primarily program specialists 2. Shows spending allocated to specific positions, which is a close proxy for salary & + benefits but is not identical.

3. Refers to expenditures that are allocated to positions but are not associated with specific FTEs, i.e. are not part of salary & benefits. Note: Total expenditure by position does not reflect partial time allocations of positions. Source: ERS comparable districts data, LCS data, ERS analysis, BCG analysis



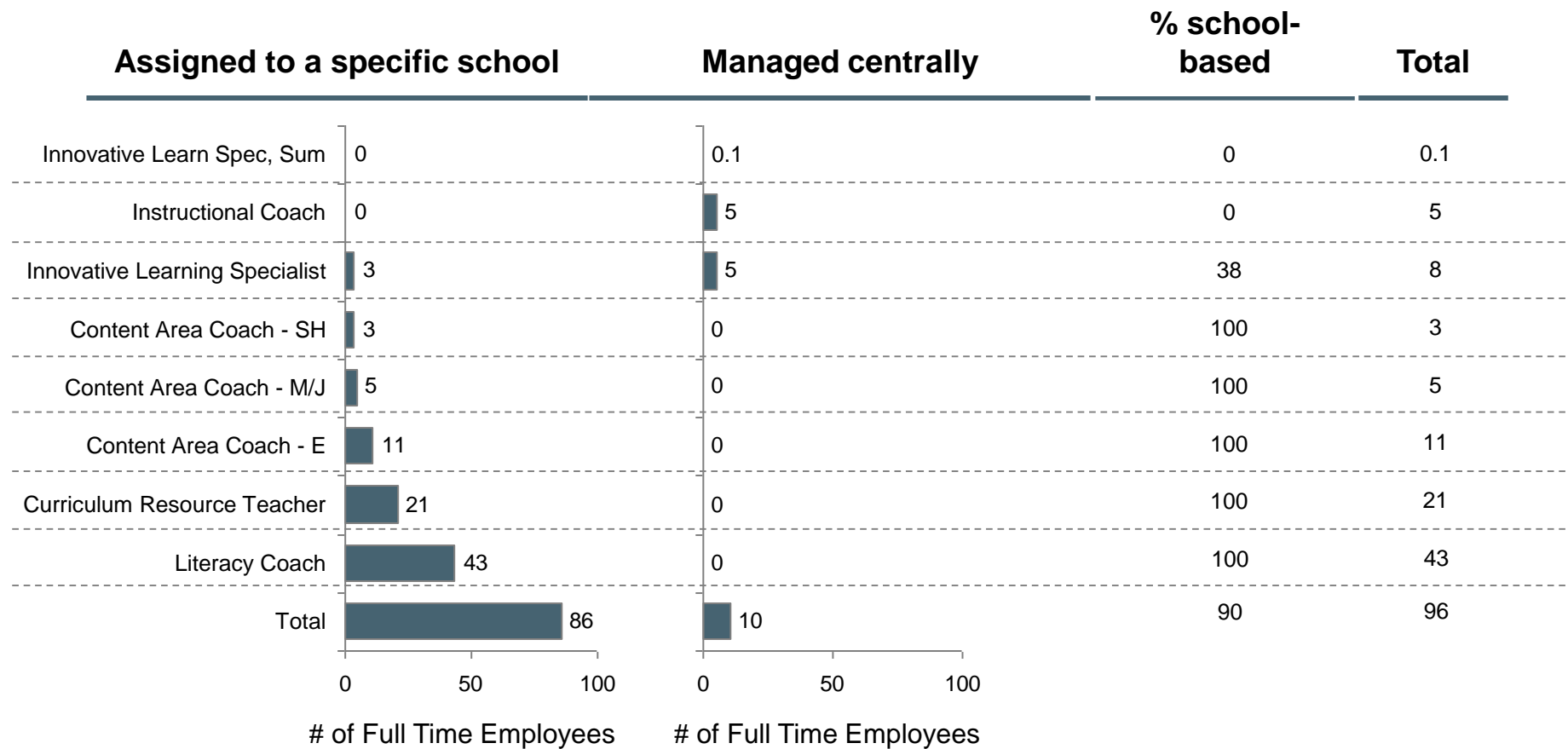
Breakdown of Title (including I, II, III, X) grant dollars spend



1. Actual value: ~\$38.7K (0.4%) 2. Actual value: ~\$128K (0.1%) Source: LCS data, ERS analysis, BCG analysis



Mix of instructional coach types and management centers

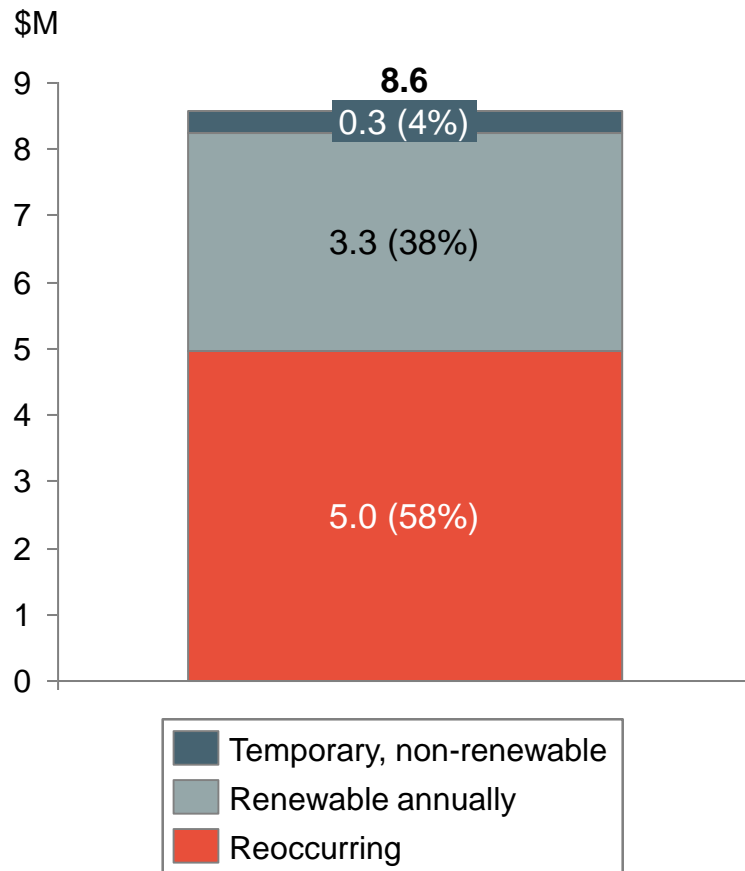


Note: Number of coaches rounded
 Source: ERS comparable districts data, LCS data, ERS analysis



Professional development funding sources by type

~58% of professional development funding from the LCS general fund

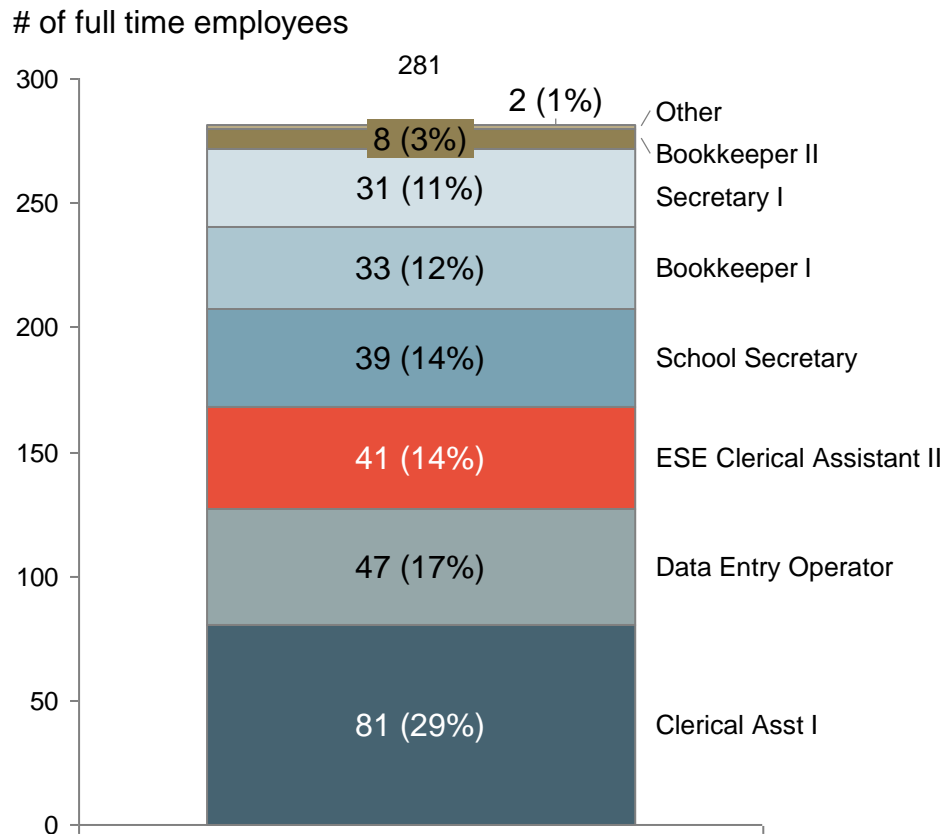


Federal and state grants makeup bulk of temporary fund sources

Category	Funds
Temporary, non-renewable	<ul style="list-style-type: none"> Race to the Top SIG Excellence Economic Education UCF – Teacher Prep Smaller learning communities Inheriting a legacy of freedom
Renewable annually (entitlement)	<ul style="list-style-type: none"> Title-I Title-II Title-III Title-X IDEA Perkins
Reoccurring	<ul style="list-style-type: none"> General fund



Main clerical positions at school level



Role/responsibilities

- Responsibilities mainly assigned at discretion of principal
- Duties such as arrival, dismissal, and lunch are often part of workload

Bookkeeper	Purchase orders, internal accounts, HR paperwork
School Secretary	Varies, but usually payroll, student enrollment and special projects for Principal
ESE Clerical Assistant	ESE student records, clerical assistance to ESE office
Data Entry Operator	Student Information System (SIS), scheduling
Clerical Assistant	Front desk



Number of staff per 1,000 students for three key positions

For the staffing levels of other positions, please see p. 31

District	# of students	Secretary / Clerical ¹		Guidance Counselors		Custodians ²	
		Total full time employees	Staff per 1,000 students	Total full time employees	Staff per 1,000 students	Total full time employees	Staff per 1,000 students
Lake	35,754	330	9.2	95	2.7	329	9.2
Fulton	88,309	593	6.7	169	1.9	481	5.4
Hall	25,939	161	6.2	47	1.8	115	4.4
Prince George's '12-'13	123,476	760	6.2	316	2.6	1,106	9.0
Knox	57,918	351	6.1	127	2.2	430	7.4

1. Includes positions coded by ERS as secretary, clerk, and other admin. 2. Custodian functional descriptions per ERS coding include: Basic, Food Service, Guidance Services, Maintenance of Plant, Operation of Plant, and School administrative (office of principal)
Source: LCS data, ERS analysis, BCG analysis



ERS position codes aligned to LCS position titles for key categories (I)

Chief /Director	# of Full Time Employees
Director, Car-tech Adult Com Ed	1.0
Director, Learning Zones	1.0
Superintendent	1.0
Chief Financial Officer	1.0
Director, Prog Accountability	1.0
Chief of Administration	1.0
Exec Director, HR & Emp Rel	1.0
Chief of Operations	1.0
Chief Academic Officer	1.0
Director of Prof Dev & Ldrship	1.0
Director, Maintenance	1.0
Director, Curriculum & Instruc	1.0
Director, Student Services	1.0
Director, ESE	1.0
Exe Dir Information Technology	1.0
Director, Federal Compen Ed	1.0
Sr Director, Academic Services	1.0
Director, Finance	1.0
Director, Growth Planning	1.0
Director, Human Resource Serv	1.0
District Athletic Director	0.5
Total	20.5

Secretary / Clerical	# of Full Time Employees
Clerical Asst I	80.6
Data Entry Operator	49.8
Ese Clerical Assistant II	40.5
School Secretary	39.5
Secretary I	34.2
Bookkeeper I	33.0
Secretary II	24.3
Bookkeeper II	10.0
Administrative Assistant	6.3
Clerical Assistant II	6.1
Clerical Assistant I	2.3
Sr Executive Assistant	1.0
Sr Exe Asst/Clerk to Board	1.0
Clerical Asst I, Summer	0.7
Temporary Assign, Clerical	0.6
School Secretary, Summer	0.5
Teacher Assistant, EBD	0.1
Data Entry Operator, Summer	0.0
Total	330.5



ERS position codes aligned to LCS position titles for key categories (II)

Assistant Principal	# of Full Time Employees
Assistant Principal I-Elem	19.0
Assistant Principal II-High	16.6
Assistant Principal II-Middle	14.3
Assistant Principal I-High	13.8
Assistant Principal I-Middle	10.0
Assistant Principal II-Elem	5.0
Instructional Dean - Elem	1.0
Instructional Dean - MS	0.8
Assistant Principal - Alt Ed	0.6
Assistant Principal-Summer	0.0
Total	81.1

Coordinator/Manager	# of Full Time Employees
Manager III, Food Service	28.9
ELC Site Coordinator	21.1
Elc Asst Site Coordinator	10.5
Manager II, Food Service	7.5
Route Manager	6.0
Manager I, Food Service	3.5
Manager, Maintenance	3.0
Grant Project Manager	2.8
Food Service Asst Manager	2.0
Supervisor, Comp/Employee Rel	2.0
Supervisor, Transportation	2.0
Manager, Warehouse	1.8
Project Manager	1.6
Project Mngr, Eval And Comp	1.1
Manager, Response/Intervention	1.0
Manager, Geographic Info Sytms	1.0
Manager, Technology	1.0
Adm Coord, Car-tech Ad Com Ed	1.0
Admin Coord, Title I	1.0
Supervisor, Food Service	1.0
Program Specialist	1.0

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ERS position codes aligned to LCS position titles for key categories (III)

Coordinator/Manager (Cont'd)	# of Full Time Employees
Project Manager, Stem	1.0
Admin Coordinator, Student Ser	1.0
Project Mngr/Intgr Data Mang	1.0
Manager, Innovative Learning	1.0
Risk Manager	1.0
Admin Coord, Grant Services	1.0
Special Project Manager	1.0
Manager, Payroll	1.0
Food Service Office Mgr/Trnr	1.0
Manager, Purchasing	1.0
Manager, Information Services	1.0
Manager, Hr Technical/Support	1.0
Service Manager	1.0
Manager, Financial Reporting	1.0
Manager, Security Services	1.0
Energy Program Manager	1.0
Plant Operations Manager/Train	1.0
Assistant Manager, Payroll	1.0
Admin Coord, Safe Schools	1.0
Admin Coord, ESE	1.0
Manager, Testing & Evaluation	1.0

Coordinator/Manager (Cont'd)	# of Full Time Employees
Manager, Accounting Services	1.0
Grounds Manager	1.0
Manager, Budget & /FTE	1.0
Senior ELC Site Coordinator	1.0
Manager, Parts	1.0
Grant Turnaround Manager	0.5
Asst Mang Summer Feeding Prgm	0.1
Central Warehouse Manager	0.1
Total	127.5



ERS position codes aligned to LCS position titles for key categories (IV)

Other	# of Full Time Employees
Bus Driver	219.7
Food Service Assistant	182.8
Bus Assistant I	53.6
Program Specialist	41.1
Ese School Specialist	36.9
Mechanic	17.0
Fiscal Assistant	16.9
Family/School Liaison	14.7
AC Mechanic	13.0
Care Giver II	11.2
Electrician	11.0
Maintenance Worker III	9.8
Lead Driver/Liaison	9.5
Pc Repair Technician	9.3
Athletic Trainer	8.3
School Testing Specialist	8.1
Carpenter	7.9
Grounds Worker III	7.5
Human Resources Specialist	7.0
Electronics Technician	7.0
Records Specialist	6.6

Other (Cont'd)	# of Full Time Employees
Network Administrator	6.4
Painter	6.3
Plumber	6.0
Care Giver I	5.7
Sign Language Interpreter-Aide	5.6
School Board Member	5.5
Accounting Assistant	5.5
Sign Lang Interpreter-LVL II	5.2
Inventory Assistant	5.1
Maintenance Mechanic	5.0
Grounds Worker IV	4.3
Programmer Analyst	4.0
Certified Purchasing Agent	3.0
Senior Accountant	3.0
Senior Accounting Specialist	3.0
Apprentice Mechanic	3.0
Potential Specialist	3.0
Computer Operator	3.0
Pc Software Tech	3.0
Grounds Worker V	2.8
Benefits Specialist	2.1

continued on next page



ERS position codes aligned to LCS position titles for key categories (V)

Other (Cont'd)	# of Full Time Employees
Assistant Purchasing Agent	2.0
Comp/ER Retirement Specialist	2.0
AC Mechanic Apprentice	2.0
Health & Safety Officer	2.0
Appliance Mechanic	2.0
Behavioral Analyst	2.0
Food Service Field Tech	2.0
Senior Planner	2.0
Roofer	2.0
Boiler Mechanic	2.0
Maintenance Worker I	2.0
Lead Maintenance Mechanic	2.0
Technical Trainer	2.0
Locksmith	2.0
Electrician Apprentice	2.0
Senior Program Analyst	2.0
Inspector & Service Technician	2.0
Driver Trainer	2.0
Lead Worker/Master Diesel Mech	2.0
Career Education Program Spec	1.9
School Bus Video Technician	1.5

Other (Cont'd)	# of Full Time Employees
TSA, Basic	1.5
Grants Specialist	1.2
Psychometrician	1.1
Accounting Specialist	1.0
Compliance Specialist, Title I	1.0
Sr Human Resources Specialist	1.0
Floor Install/Repair	1.0
Position Control Analyst	1.0
LCEA Vice President	1.0
Building Automation Technician	1.0
TSA, Guidance Services	1.0
Research Specialist	1.0
Evaluation And Comp Analyst	1.0
FTE Analyst	1.0
Mentor Advocate	1.0
Loss Control Officer	1.0
Student Information Analyst	1.0
Grounds Worker VI	1.0
Head Garage Mechanic	1.0
On-line Specialist	1.0
Programmatic Technical Analyst	1.0

continued on next page



ERS position codes aligned to LCS position titles for key categories (VI)

Other (Cont'd)	# of Full Time Employees
Paint Crew Leader	1.0
Property Control Specialist	1.0
Computer Support Specialist	1.0
Campus Monitor	1.0
Database Administrator	1.0
LCEA President	1.0
Water/Wastewater Technician	1.0
Foundation Grants Specialist	1.0
Claims Management Specialist	1.0
Upholstery/Glass Technician	1.0
Parent Spec Comm Svcs, Title 1	1.0
Foundation Events Specialist	1.0
Parts Employee	1.0
Shared Svc Network Proj Fac	1.0
Payroll Specialist	1.0
Accountability Analyst	1.0
Communications Officer	1.0
Student Advocate (Bilingual)	1.0
Head AC Mechanic	1.0
IT SQL Programmer	1.0
Plaster/Mason	1.0

Other (Cont'd)	# of Full Time Employees
IT System Programmer	1.0
Head Electrician	1.0
Master Paint & Body Technician	1.0
Web Content Specialist	1.0
Irrigation Technician	1.0
IS Quality Assurance Analyst	1.0
Enterprise Data Wrhs Architect	1.0
Lead Driver Summer	1.0
Senior Benefits Specialist	0.9
TSA, ESE	0.9
Info & Infra Security Admin	0.8
TSA, Vocational	0.8
Bus Assistant II	0.8
Property Control Assistant	0.7
Food Service Asst Unassigned	0.7
Grounds Worker II	0.6
Migrant/Homeless Rsrc Advocate	0.5
Grants Specialist - TSIC	0.4
Business Process Improve Spec	0.3
Tutor	0.3
IT Systems Analyst	0.3

continued on next page



ERS position codes aligned to LCS position titles for key categories (VII)

See Appendix p. 46 for information on Instructional Coach expenditures

Other (Cont'd)	# of Full Time Employees
Summer Monitor	0.1
Clerical/Tchr Asst Sub	0.1
Behavioral Analyst, Summer	0.1
Duplicator Technician	0.1
Sign Lang Interp-IV II Sum Esy	0.0
Total	890

Instructional Coach	# of Full Time Employees
Literacy Coach	43.1
Curriculum Resource	21.0
Content Area Coach - E	10.6
Innovative Learning Specialist	8.2
Instructional Coach	5.0
Content Area Coach - M/J	4.7
Content Area Coach - SH	3.6
Innovative Learn Spec, Sum	0.1
Teacher	—
Library/Media Specialist-Elem	—
Teacher, Fourth	—
Teacher, Title I-Elem	—
Tutor	—
Total	96.3

