



# Budget Advisory Task Force Arlington School District



## MEETING NOTES

January 17, 2023

### In Attendance:

Mike Cross, Darlene Fulfs, Angie Hansen, Mikaela Harrington, Crystal Henderson, Scott Hodgson, Nanci Johnson, Matt Jurick, Michelle Kinney, Jason Klein, Alyson Kleinman, Britt Kleinman, Mariska Lebahn, Lamar Lindsay, Mark McDougall, Verlaine Meyers, Virginia Muniz, Courtney Normand, Erica Rose, Marc Rosson, Chrys Sweeting, Jamie Wilson, Gina Zeutenhorst and Brian Lewis

### Key Takeaways from Last Meeting

Gina Zeutenhorst, Executive Director of Financial Services, shared key messages from our first few meetings. Our challenges include:

- Dipping into fund balance because of fund balance spenddown as directed by the Board.
- Enrollment recovery is taking place slower than expected.
- Staffing maintained, but did have some furloughs.
- State Funding Issues and Rising Costs. McCleary model is based on averages rather than actual salary costs causing a misalignment. Proto-typical model way of funding.

### Revisiting Our Purpose

Superintendent Sweeting revisited the purpose, goals and authority level of the Task Force. She also shared links to several articles including an article published by North County Outlook regarding Arlington's Financial Position, a link to another school district in the state facing similar budget challenges and a link to a funding formula article.

### Review of Preliminary Enrollment Projections

Brian Lewis, Executive Director of Operations, shared his roles and responsibilities as Executive Director of Operations. Demographic firm was hired in 2021. Brian shared the definitions, factors that influence enrollment and methodology of projections. He shared that FTE is the "full-time equivalent" factor related directly to the number of hours a day a student receives instruction. Full FTE = attending at least 5 hours and 33 minutes. Headcount is the total number of people.

Mr. Lewis shared that several factors could influence enrollment such as:

- Births
- Transitions
- Construction
- Mobility
- Withdrawal from School
- Pandemic

Mr. Lewis shared the different methods of projections which range in volatility and conservatism. The three different methodologies include: 1. Cohort Survival – most volatile 2. Weighted Historical Average and 3. April Roll Up. The group reviewed all three, and Mr. Lewis shared that the district is recommending the April Roll Up method to the Board for approval at the January 23 board meeting.

### **Review of Staffing Formulas**

Superintendent Sweeting shared that there is a connection to the enrollment projections for staffing. The Board approved projected enrollment number is used to calculate staffing for each grade level and for each school, using targets and ratios.

### **Feedback Activity**

Executive Director Zeutenhorst engaged the group in a feedback activity where they identified and answered the following questions:

- What are they worried about?
- What are their values/priorities?
- What are their hopes and ideas?

A brief sharing and discussion took place.

### **Closing**

The first of three Community Forums is scheduled for Tuesday, January 24 from 6-7:30 in the BPAC foyer and the next BATF meeting is scheduled for February 13, 2023.