Upper Arlington Schools
EFFICIENCY PROJECT

Presented to the
Upper Arlington Board of Education

August 5, 2013

Guiding Principles

UPPER ARLINGTON SCHOOLS is proud to offer a world-class educational experience for all students.

UPPER ARLINGTON SCHOOLS will make decisions based upon the best interest of students.

UPPER ARLINGTON SCHOOLS will operate in an efficient and financially responsible manner.

UPPER ARLINGTON SCHOOLS will exercise financial discipline by maintaining an unreserved fund balance sufficient to cover approximately 3 months of operating expenses.

Introduction

UPPER ARLINGTON CITY SCHOOLS is a public school district committed to serving the students, families and residents of the Upper Arlington community by providing a world-class educational experience in an efficient and financially responsible manner.

Academic achievement and extra-curricular excellence have long been hallmarks of the Upper Arlington school system. While student performance ranks the district among the best, financial practices have earned the district similar accolades, including the coveted AAA bond rating from Standard and Poor's. Reaching these high standards has been possible due to a combination of the caliber of Upper Arlington students, the dedication of their families, the talent level of the staff and a tremendous amount of support from the community.

A transparent partnership between the schools and the community is of paramount importance to the success of both entities. In November of 2012, voters turned down a 5.8-mill levy request that was designed to last 3 years. Upper Arlington Schools recognized the community's desire for change and implemented cost-reduction measures and reduced future budget projections. Those actions, combined with an increase in revenue due to utility and casino taxes and a reduction in medical insurance premiums, will improve the district's financial outlook by approximately $21 million by the end of fiscal year 2017.

In November of 2013, voters will see a much lower levy request that is designed to last longer. The four-year, 4-mill request is possible due, in part, to the recent cost-reduction measures and the district's commitment to engage in this Efficiency Project, which will utilize creativity, technology, partnerships and shared services to reduce forecasted costs by a cumulative amount of $4.5 million by the end of fiscal year 2017. The district will also strive to identify additional revenue streams outside of new levies. Combined, all of these measures will enable the district to continue to exercise financial discipline and maintain appropriate reserves.*

While the term efficiency leads many to think of financial matters, Upper Arlington Schools' Efficiency Project is designed to benefit more than the bottom line. As an educational institution, the district believes that all actions must help support the creation of positive and successful learning environments for students. This project will do just that - by eliminating overlap and streamlining practices while increasing the focus on student and instructional needs. Enabling concentration on the most important elements of the educational experience will allow the district to continue in its role as a leader among high-achieving and innovative school districts.

Unreserved fund balance of approximately three months worth of operating expenses

Process

THE FIRST, and perhaps most important, step in the Efficiency Project is gathering input from the many groups that play a role in the success of Upper Arlington Schools and, in turn, the students of this community. To that end the district will invite members of the Financial Advisory and Consulting Team (FACT) and the PTO Presidents Council to serve as advisory groups throughout the project. With the help of these engaged parents and residents, the district will create an easily accessible online survey to gather feedback from the entire community. The survey will include multiple-choice questions and opportunities to provide open-ended responses. A link to the survey will be available on the district website, social media presences and pushed out through parent emails. Paper copies of the survey will be made available at schools, the Upper Arlington Senior Center, Upper Arlington Library locations and city offices.

The district will also conduct an internal needs assessment by holding staff-member forums at each of the district's facilities. These meetings will focus on defining the primary needs for providing a world-class educational experience for Upper Arlington students.

The next step in the process will be analyzing and interpreting the data provided by the survey. District leaders will share these results publicly and work with the advisory groups to collect additional feedback, including potential action steps for moving forward.

Finally, the district leadership team will synthesize all of the available data and create a detailed plan of action. This plan will include the targeted cost-reduction amounts for each of the next three fiscal years. It will also include the areas in which these efficiencies will be sought and a summary of the action steps necessary to make these changes a reality.

Advisory team members and district leaders will report back to the board upon the completion of the initial plan and in conjunction with the treasurer's five-year forecast presentations that occur in May and October of each year.

Timeline

SEPTEMBER 2013 – Initial advisory group meetings to review survey draft

SEPTEMBER 2013 – Survey finalized

OCTOBER 2013 – Survey release

OCTOBER 2013 – Survey close

NOVEMBER 2013 – Survey data meetings with advisory groups

NOVEMBER 2013 - All survey data posted on the district website, www.uaschools.org

NOVEMBER/DECEMBER 2013 – Recommendation and feedback meetings with advisory groups

JANUARY 2014 – Efficiency plan presented to the Board of Education

MAY 2014 – Efficiency plan update to the Board of Education

OCTOBER 2014 – Efficiency plan update to the Board of Education

MAY 2015 – Efficiency plan update to the Board of Education

OCTOBER 2015 – Efficiency plan update to the Board of Education

MAY 2016 – Efficiency plan update to the Board of Education

OCTOBER 2016 – Efficiency plan update to the Board of Education

MAY 2017 - Efficiency plan update to the Board of Education

OCTOBER 2017 - Efficiency plan update to the Board of Education

Communication & Transparency

THROUGHOUT THE EFFICIENCY PROJECT the district will make available up-to-date, detailed information for all stakeholders. A special section of the district website will house the following information:

-Survey questions
-Survey results
-Summary reports of advisory group meetings
-Efficiency plan document
-Running tabulation of enacted cost-reduction methods and/or new revenue sources
-Update reports made to the Board of Education

In addition to the information posted on the district website, stakeholders will be kept apprised of the status of this project through emails, submitted newspaper columns, newsletters and social media.

Conclusion

UPPER ARLINGTON SCHOOLS is committed to providing a world-class educational experience for all students while working in collaboration with the community. The Efficiency Project is a key factor in enabling the district to reduce the levy amount from 5.8 mills (2012) to 4 mills (2013) and to make those funds stretch an additional year.

This project also offers the valuable opportunity to utilize the expertise of community and staff members to enhance the educational experience for students. As Upper Arlington Schools enters the final year of its strategic plan, the Efficiency Project will serve as important foundational work for the next generation of that plan. At the conclusion of this exercise, the district will be a more focused, agile and sustainable organization better able to uphold its commitment to serve the students and families of the Upper Arlington community.