



BUDGET ADVISORY TEAM REPORT

2022-2023

Summary Report of Budget Advisory Team Activities & Outcomes for 2022-23
Presented to Shoreline School Board – March 7, 2023

Business & Operations



Budget Advisory Team 2022-23 Summary Report

Background:

In October 2022, the Shoreline School District began seeking members of the Shoreline community, to include staff, students, parents, and other stakeholders, to participate in a newly-formed Budget Advisory Team (BAT). The BAT was created for the purpose of gaining broader input on District budget planning and to increase knowledge and transparency of District financial operations.

The BAT was also formed with the knowledge of the district's financial position for 2022-23, with an approved budget that envisioned overspending current revenue by \$10.5 million dollars, leaving a precariously low anticipated ending fund balance of just over one million dollars. The BAT was anticipated to support a budget constriction process through input and prioritization.

BAT Membership:

The creation of the BAT and a solicitation for interest was published to the community, and various District stakeholders were invited to join the BAT and participate in the work. There were fifty-five applicants to the BAT. District leadership reviewed the applications and selected members based on an interest in balanced representation. This included ensuring representation of various stakeholder groups (parents, students, community members, administrators, teachers, classified staff, etc.) as well as diverse representation, balanced to ensure representation across the district, east to west and north to south.

Ultimately 32 BAT members were originally selected, and they were supported by BAT Co-Chairs Brian Schultz, Assistant Superintendent of Schools and Jennifer Farmer, Assistant Superintendent of Business & Operations. Additional staff from Human Resources, Finance, Student Services, and Public Information also participated for the purpose of supporting the work of the BAT.

November 7, 2022:

At the first meeting of the BAT, members were introduced to each other and a calendar of anticipated events was presented to the BAT. The team also discussed norms for the work to be completed, and received information from the district on the basics of school district budgeting and fund balance.

November 14, 2022:

The BAT received a State of the Schools opening comment from Superintendent Dr. Susana Reyes, learned about the District's Race & Equity Impact Decision Making Tool and experienced activities related to the district's race and equity work. The team also received information from the district on the basics of school district revenue and expenditures.

December 5, 2022:

The norms for the BAT were finalized and the team was able to hear from instructional leadership on the district's academic achievement and vision, including Instruction, Student Services, and Categorial Programs. There was also a brief overview regarding the upcoming legislative process and how it impacts schools, as well as an update on the current year's budget trends.

January 9, 2023:

BAT was provided with a budget-to-actual report through November, showing that the district's projections for revenue and expenditures were nearly identical to the trends so far. BAT also received information from the district related to salary vs. non-salary costs, early enrollment projection work, and the current assumptions for planning the budget reduction process that had been presented to the Board of Directors on December 13th. School Board President Sarah Cohen provided the BAT with their charge from the School Board for their work ahead. The charge asked the BAT to envision a list of reductions that could achieve the restoration of the board's 4-5% ending fund balance policy. Given the early predictions of revenue/expenditures, this reduction target was equivalent to approximately \$18-\$19 million dollars.

Following receiving the charge from the Board, BAT participated in an activity to share ideas, concerns, and questions. Themes from this work included:

- Under-enrolled schools, potential closures/consolidations
- Opportunities to seek more revenue
- Concern about class sizes
- Interest in preserving equity work

- Desire for school building staff engagement in identifying reductions
- Information requests for average costs of each position
- Interest in understanding bus routing/walk zones
- Contract obligations
- Concern about timing to make decisions
- Local vs. state funding for various staff
- Mandatory vs. discretionary programs
- District office expenditures
- Outsourcing feasibility
- Interest in understanding areas less likely to impact student experience
- Concern about the magnitude of the reduction
- Concern about the effects on the people involved, students and staff

BAT Resignations:

At the January 10 regular school board meeting, many members of the district's bargaining partner groups attended the meeting to express their concerns about the charge provided to the BAT, and both Shoreline Education Association (representing teachers) and Shoreline Education Support Professionals Association (representing various classified staff) submitted their resignation from the BAT. In addition, during the month of December and January, additional resignations were submitted from other parents, community members, and staff for various reasons including: work commitments, medical leave, discomfort with the amount of reduction/BAT charge.

Following the resignations, BAT was reduced to 17 members, including: 9 staff, 4 students, and 4 parents. Given the loss of membership, BAT paused briefly to re-evaluate the plans to move forward. The addition of new members was considered, but without the benefit of all the information provided to date, new members would be at a significant disadvantage. It was determined to re-tool the BAT work given time constraints and the significant loss of membership.

February 6, 2023:

The reduced BAT convened to discuss the changes that had occurred and next steps forward. The BAT met in various small groups to provide input and feedback on a draft survey that would be available to all District stakeholders for response.

February 27, 2023:

BAT convened to review the survey results/comments for themes and general thoughts. For this meeting, there were two community/parent members and two new student members who had not previously attended BAT. BAT was thanked for their time and

commitment to the district and the budget process, and we determined collectively that there would be no need for the March 6th previously scheduled meeting.

BAT Membership:

Abby Lane*	SEA/staff
Alicia Arnold*	SEA/staff
Amelia Johnson*	SESPA/staff
Ann Torres	SPA/Elementary Administration
April Eslami*	Parent/Guardian
Barb Cruz*	SESPA/staff
Bill Dunbar	Secondary Administration (HS)
Darlene Mendoza	Human Resources Administration
Drew Cook	Parent/Guardian
Dawn Hamid*	SESPA Classified
Ellen Kaje	SCA/District Administration
Helen Murphy	Shorewood HS Student Rep
Hillery Clark	Early Learning
Jamila Gordon	Secondary Administration (MS)
Jessica Jandayan	Food & Nutrition Services Administration
Joe Cea	Parent/Guardian
Karen Resquer Burnham	Parent/Guardian
Kayla Welch*	SEA/staff
Luke Smith	Shorecrest HS Student Rep
Lyn Sherry*	WEA Representative/SEA & SESPA
Matt Reiman*	SEA
Mike VanOrden	District Academic Officer
Rachel Li	Student
Remi Rajotte*	SEA/staff
Rob Gudmestad*	SEIU/staff
Sadrina Dorn*	SEA/staff
Shivraj Raichur	Student
Tanisha Brandon-Felder	District Administration
Tonya Drake*	Parent/Guardian
Travis Fullum	Parent/Guardian
Xandra Peter*	SEA/staff

*Members marked with an *resigned from BAT for various reasons, mostly in December 2022 and January 2023.*

BAT Support:

Dr. Susana Reyes	Superintendent
Brian Schultz	Co-Chair/Assistant Superintendent of Schools
Jennifer A. Farmer	Co-Chair/Assistant Superintendent Business & Operations
Mark Spangenberg	Finance Administration

Nancy Elder
Rachel Belfield

Human Resources Administration
District Public Information Officer

Meghan Jernigan
Emily Williams
Sarah Cohen
Rebeca Rivera
Sara Betnel

School Board Member
School Board Member
School Board Member
School Board Member
School Board Member