

DATE: September 15, 2021
TO: Members of the Alexandria City School Board
FROM: Budget Advisory Council
Nancy Drane (Chair); Selena el Hajii; Sukumar Rao; Ryan Reyna¹
SUBJECT: BAC End of Year Report 2020-2021
CC: Robert Easley, Director, Budget & Fiscal Compliance, ACPS Staff Liaison

The Alexandria City School Board Budget Advisory Committee (BAC) hereby submits this report summarizing its activities during the 2020-2021 academic year. As you are well aware, the emergence of the COVID pandemic curtailed BAC's activities between March 2020 and November 2020. When BAC meetings resumed in December 2020, the pandemic necessitated virtual, rather than in-person, meetings. Nevertheless, BAC is happy to report on the work that it conducted; valuable work that will inform its future activities. To that end, BAC will be providing a 2021-2022 Scope of Work to the School Board through a separate memorandum shortly.

Summary of 2020-2021 Activities

BAC met 7 times during the 2020-2021 academic year: December 15, 2020; January 19, 2021; February 23, 2021; March 16, 2021; April 20, 2021; May 18, 2021; and June 22, 2021. (*Minutes of those meetings are attached in Appendix 4.*) BAC submitted a 2020-2021 Scope of Work to the School Board in January 2021. (*BAC's 2020-2021 Scope of Work is attached in Appendix 1.*)

During its 2020-2021 term, BAC worked towards the development of a comprehensive memorandum on the Board's budget development and adoption process. The genesis of this memorandum was feedback BAC received from Board members during the 2019-2020 term through a detailed survey and subsequent individual interviews with Board members. BAC's primary goal in doing so was to ensure that, consistent with [its bylaws](#), it was providing practical information to the Board that supports the Board's budget-related activities and is responsive to Board members' needs.

Throughout the course of 2021, BAC members explored budget-related issues identified by the Board and ACPS staff through discussions with individual Board members and ACPS finance staff. This work included an analysis of current and past budget calendars. At ACPS staff's urging, BAC conducted comparison research with neighboring and/or comparable jurisdictions that were identified in consultation with ACPS finance staff. After this initial information gathering and research stage, BAC members consulted over the course of several months on

¹ BAC would like to acknowledge and express gratitude for the participation of our past Chair, Erin Dahlin, and past member, Sean McEneaney. This end of year report is being prepared by the 2021-2022 BAC.

lessons learned from other jurisdictions and the feedback received from ACPS stakeholders, culminating in a comprehensive memo with a series of recommendations for the Board's consideration. ACPS staff and the Board liaison were involved throughout, both in BAC discussions and in the memo drafting stage. BAC enjoyed this productive and collaborative discussion among members, with ACPS staff, and the Board liaison.

In May 2021, BAC submitted its memorandum to the Board, followed by a presentation during the May 20, 2021 Board meeting. (*BAC's Memo and Presentation are attached in Appendix 2.*) The memorandum and presentation were well received by the Board.

ACPS staff subsequently issued a formal response to the BAC memo in the form of a Board Brief that was discussed at a subsequent Board meeting. (*The Board Brief is attached in Appendix 3.*) In the Brief, staff stated that "[a]s is customary for financial reviews (Annual Operating Fund audit, School Activity Fund Audit, etc.) staff submits the following management response."

While BAC respects the views contained in that Brief, it would have preferred a process where any issues were raised and resolved in advance. This was not an audit, but rather a document that, by definition, sought to propose recommendations that incorporate ACPS staff input. This is critical so that BAC can consider staff views and suggested changes and edit the report accordingly. We hope to avoid this type of occurrence in the future. In BAC's view, a report that is the result of a complete exchange of views between BAC and ACPS staff in advance of its submission will better serve the Board.

BAC has always and hopes to continue to have a warm and positive relationship with ACPS staff. The BAC memo contains a series of suggestions that will require collaboration among ACPS staff, BAC, and community stakeholders to be successful. BAC is anxious to continue its work on these initiatives, and looks forward to our continued work with the Board and ACPS staff.

BAC appreciates the School Board's support of its work and the support of ACPS staff, and will endeavor to continue to provide the best recommendations possible on the budget and fiscal affairs of Alexandria City Public Schools.

APPENDIX 1: BAC SCOPE OF WORK 2020-2021 (JANUARY 2021)

MEMORANDUM

DATE: January 19, 2021

TO: Members of the Alexandria City School Board

FROM: Budget Advisory Council
Erin Dahlin (Chair); Nancy Drane (Secretary); Sean McEneaney; Sukumar Rao

SUBJECT: 2020-2021 Scope of Work

CC: Dominic Turner, ACPS Chief of Financial Services
Robert Easley, ACPS Director of Budget, Financial Systems, and Reporting
Kathy Stenzel, Alexandria City Budget and Fiscal Affairs Advisory Committee

The School Board Budget Advisory Committee (BAC) has developed the following scope of work document for the School Board's review.

During the 2019-2020, BAC surveyed School Board members for input on the scope of BAC's activities and desired outcomes from the perspective of the School Board. One clear issue that arose during the interviews with School Board members was a deeper look into the sequencing of the City and ACPS' Budget Calendar and, in particular, concerns around the alignment between City and School Board budget review and approval. The most prominent concern voiced by School Board members is the fact that historically, the City Manager releases his proposed budget (including the ACPS appropriation) *before* the School Board has formally approved the Superintendent's proposed operating funds budget.

Between now and May 2021, BAC will explore the City and ACPS budget calendar timelines with the goal of developing a set of recommendations for addressing the set of concerns that have been raised by School Board members in the past. While the sequencing of decision-making is the one point that has garnered the most focus, there could be other things BAC will discover about the sequencing writ large. BAC's effort will include an analysis of surrounding and/or comparable jurisdictions.

BAC's Scope of Work will include the following:

- an overview of the ACPS budget calendar process and the identification of any and all sequencing concerns with the City budget calendar;
- identification and exploration of the most significant impediments to aligning the School Board and City budget calendars;
- comparisons from other neighboring or comparable jurisdictions;
- consideration of potential adjustments that could be made to align the sequencing, with an exploration of the pros and cons of each adjustment; and

- exploration of the efficacy of other budget-related events (e.g., Community Budget Forum) (as time allows).

In order to advance this Scope of Work, BAC members will endeavor to study other jurisdictions in neighboring or comparable jurisdictions. In addition, recognizing that there is additional coordination that happens outside of the published calendar, BAC members will interview ACPS and City staff to explore relevant issues.

BAC has received guidance that having its memo available to the School Board in May 2021 will be sufficient to allow for its consideration before the 2021-2022 budget calendar is proposed by ACPS in approximately June 2021.

BAC appreciates the School Board's support of its work and will endeavor to continue to provide the best recommendations possible on the budget and fiscal affairs of Alexandria City Public Schools.

APPENDIX 2: BAC BUDGET PROCESS MEMO (MAY 2021)

MEMORANDUM

DATE: May 18, 2021

TO: Members of the Alexandria City School Board

FROM: Budget Advisory Committee
Erin Dahlin (Chair); Nancy Drane (Secretary); Selena El Hajji; Sean McEneaney;
Sukumar Rao

SUBJECT: Budget Process Report

CC: Dominic Turner, ACPS Chief of Financial Services
Robert Easley, ACPS Director of Budget, Financial Systems, and Reporting
Kathy Stenzel, Alexandria City Budget and Fiscal Affairs Advisory Committee

The Alexandria City School Board Budget Advisory Committee (“BAC”) presents the following report and recommendations to members of the Alexandria City School Board (“Board”) in furtherance of BAC’s 2020-2021 proposed scope of work.

Background

During its 2019-2020 term, BAC surveyed the Board for input on ways that BAC could support its efforts to inform BAC’s 2020-2021 scope of work. One of the issues Board members identified was the relative sequencing of the Board’s and Alexandria City Council’s (“Council”) budget review and approval. Several Board members voiced concern that the Board’s role in approving the Superintendent’s proposed budget had been devalued over time because the Alexandria City Manager typically releases his proposed budget to the Council (including the ACPS appropriation) *before* the Board is scheduled to approve the Superintendent’s proposed budget. This was described as problematic because:

1. a Board vote adjusting the Superintendent’s proposed budget *after* the City Manager’s budget is released would be practically difficult to implement;
2. it undermined one of the primary roles and functions of the School Board, to review and approve the budget; and
3. having the City Manager saying that he’s met ACPS’ request when the School Board has not actually approved the budget diminishes the Board’s role and autonomy.

Board members noted that in recent years, this concern was less acute because the Board was sufficiently aligned with the Superintendent on the budget request, but if it were not the case, it could be highly problematic – and that as a best practice, it should be corrected.

Board members shared that this concern had been discussed over many years both internally within the Board and during joint Board-Council discussions, but that cited challenges in aligning the schedules effectively deemed the problem too difficult to solve. During the Ad Hoc Joint City-Schools Facility Investment Task Force meetings, reference to a 2007 recommendation to establish budget targets for the Schools was referenced in an available [BFAAC memo](#). This memo provided a history lesson, of sorts, on how the city and schools budget timelines have evolved as a

result of hugely misaligned processes in the past. Board members asked BAC to examine the issue with fresh eyes, and endeavor to identify potential ways to streamline the budget process in order to allow for more optimal alignment between the Board and Council calendars. BAC agreed, and incorporated this into its 2020-2021 Scope of Work. (*Appendix A*)

Goals

BAC's goal in taking on this work was to determine whether there is a way for the Board to develop a more streamlined, efficient budget process. While the concerns addressed above were the primary impetus for seeking this examination, BAC endeavored to look at the budget process holistically. For the purposes of this effort, BAC was focused on the Board's Combined Funds budget process and not the Capital Improvement Program ("CIP") budget process. Since the Board's review of the CIP occurs in November and December, it doesn't raise the same sequencing concerns.¹

In BAC's view, the most pressing issues to be explored included:

1. an overview of the ACPS budget process and identification of sequencing concerns with the City budget calendar;
2. identification and exploration of the most significant impediments to aligning the Board and City budget calendars;
3. comparisons with other neighboring or comparable jurisdictions' budget calendars; and
4. identification of potential recommendations for a more streamlined, efficient Board budget process, with the related costs/benefits identified.

While one option might be to ask the City to adjust its calendar, BAC endeavored to identify adjustments that were within ACPS and Board control. BAC explored these issues through discussions with individual Board members, ACPS budget staff, and through comparison with neighboring or comparable jurisdictions identified in consultation with ACPS budget staff. BAC's goal was to be guided by principles of efficiency and 'working smarter, not harder,' knowing that having a simpler process often leads to better engagement. While most of our recommendations are through the lens of the schedule and timing, we have made other recommendations that we think would benefit the budget process more generally.

Overview of ACPS Budget Process and Streamlining Opportunities

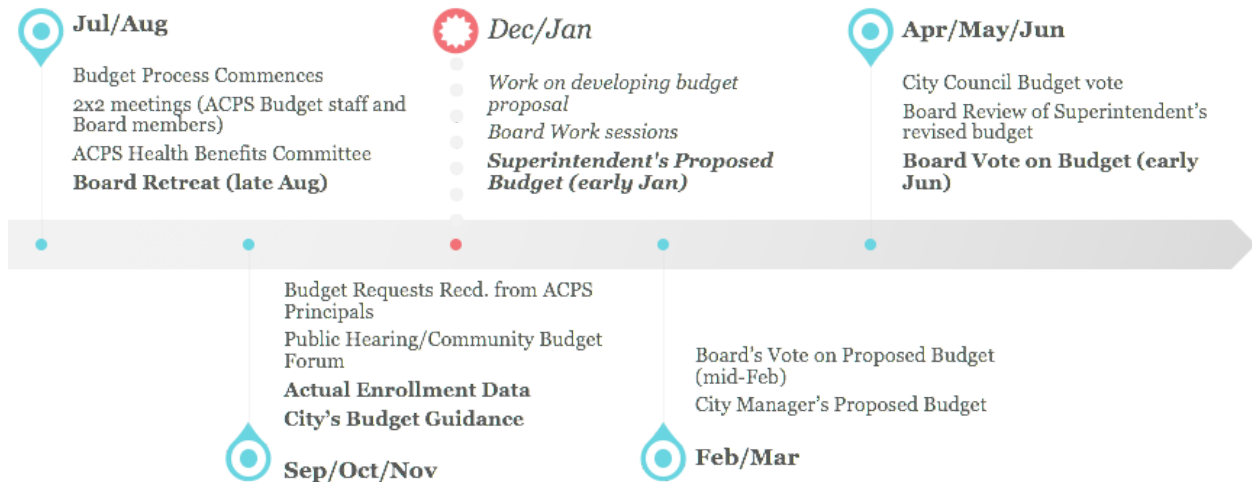
BAC conferred with ACPS budget staff to seek their qualitative assessment of the budget process. Generally, ACPS budget staff shared that the Board's deliberation of the budget feels "compressed." In fact, ACPS budget staff urged BAC to consider whether the Board might move the approval vote to an even later date in order to allow for more time for Board deliberation. At the same time, during discussions, ACPS budget staff expressed an openness to streamline certain parts of the process to promote efficiency, as discussed below.

¹ That said, we do note later in this memo that adjustments to the CIP budget review might allow more time for the Combined Funds budget development and review.

While the ACPS budget calendar (*Appendix B*) speaks for itself, we have included this summary of the budget development process, incorporating a discussion of some of the external factors that play a role in the timeline.

Budget Timeline

Timeline - Summary



Narrative Overview of the ACPS Budget Process

ACPS budget staff generally begins the budget process during the month of July. ACPS budget staff meet with Board members in August in two-by-two meetings to provide introductory, 'budget 101' information to get the process started. Separately, an ACPS health benefits committee convenes during the summer months to consider whether there will be any recommended benefits-related changes to incorporate into the budget.² This is a critical piece, since such a high percentage of the ACPS operating budget is dedicated to staff compensation and benefits.

The Board typically holds a retreat/work session in late August to set substantive budget priorities and rules of engagement for the budget process. This budget priority work session is guided by a comprehensive set of materials prepared by ACPS staff, including achievement data, and is reflective of the Board's strategic vision. Several related work sessions follow in early September before the priorities and rules of engagement are formally adopted by the Board. All told, there are at least five Board sessions devoted to setting priorities, budget engagement rules, etc. in August, September, and October.³ These then guide the development of the ACPS budget.

² This work actually begins earlier in the Spring, when ACPS works with a third-party consultant to develop and refine benefits projections.

³ For FY21, there was a retreat on 8/27/20, work session on 9/10/20, adoption of calendar and budget process on 9/17/20, fiscal forecast work session on 9/17/20, and adoption of budget priorities on 10/1/20.

After budget priorities are set, ACPS budget staff meet with ACPS principals and staff to promote and support the development of budget requests reflective of those priorities. These budget requests are received by ACPS budget staff during the month of October. Also during October, the Board holds a public hearing (for FY22, it was on October 1, 2020, the same day as the budget priorities were adopted), and ACPS budget staff traditionally hold a Community Budget Forum to preview the budget process for that year and the priorities that will guide the budget process (for FY22, it was on October 19, 2020).

Several other pieces of critical information are received by ACPS budget staff during the months of October and November. Despite being targeted to arrive in late-September, it is usually during the month of October that ACPS receives actual enrollment or average daily membership (ADM) data. This data guides Virginia state funding projections for the fiscal year, which make up about \$50M of the total budget (close to \$300M in FY21). The City's budget guidance, which typically comes out at the end of October or beginning of November following a Council retreat, is another critical piece of information since City funds formulate approximately 75% of the total budget. Enrollment projections are also usually received the first or second week of November.⁴

During the months of November and December, ACPS budget staff work on reviewing and refining budget proposals and compiling them into a workable budget proposal. ACPS staff complete as much of the draft budget as they can without the projections described above, but they are needed in order to finalize the draft budget. ACPS budget staff noted that inputting the enrollment numbers is not as simple as it might seem, and that principals often need to go back to their staffing plans to readjust not just classroom, but other positions, based on enrollment figures.

It is during this same time that the CIP is considered by the Board. This is handled separately from the Combined Funds budget and in the ACPS budget staff's view, more straightforward as it is a multi-year document. The Superintendent typically presents the proposed CIP in November (during a regular Board meeting), followed by two Board work sessions, a public hearing (held on the same day as one of the work sessions), two add/delete sessions, and ultimately, the adoption of the CIP in mid-December. Typically, the discussion is focused on the activities slated for the next fiscal year and what has changed from the prior year's approved CIP.

The Superintendent's Combined Funds budget proposal is typically released in early January, accompanied by a comprehensive budget book. ACPS budget staff continue to support the Superintendent and the Board during the months of January and February through a series of two work sessions, two public hearings (both on the same dates as regular Board meetings), and two add/delete sessions.⁵ The first work session includes a presentation to the Board from ACPS staff on the compensation and benefits pieces of the proposed budget (about 88% of the total budget). The second work session includes a presentation to the Board from ACPS staff on the remaining, operating pieces of the proposed budget (about 12% of the total budget). While two add/delete sessions are scheduled to allow for Board deliberation on changes to the Superintendent's proposed budget, the second add/delete is often unnecessary.

⁴ Note: In 2020, these were received during the last week of November/first week of December due to pandemic-related delays.

⁵ The Board tends to avoid discussing and adopting measures at the same meeting. Work sessions are more about "having" the discussion, where at meetings they "adopt" the measure. That may require multiple meetings to resolve a particular item.

This work culminates in the Board's vote on the proposed budget (incorporating those add/deletes) in mid-February. As noted above, this vote typically occurs after the City Manager has released his proposed budget (including the ACPS allocation). For example, in 2020 the City Manager released his proposed budget to the Council on February 16 and the Board adopted the ACPS Combined Funds budget on February 18.

Attention then turns to the Council's budget process. The Council typically votes on its budget in mid-April. The Board then reconsiders the Superintendent's adjusted CIP and Combined Funds budgets in light of the Council's appropriation. The Board holds one work session, one add/delete session, another public hearing (on the same date as one of the Board work sessions) and then ultimately adopts the adjusted budgets in early June.

Coordination with City Staff

ACPS staff noted that there is robust City-Schools coordination throughout the year. The Superintendent and the City Manager meet bi-weekly, and the ACPS Chief Financial Officer meets frequently with the Deputy City Manager and has direct access to the Director of the City's Office of Management and Budget. These conversations, particularly among budget staff, accelerate in October and throughout the remainder of the budget process. Similarly, there are frequent opportunities for Council and Board leadership to meet throughout the year, including formal joint Council-Board sessions and a City-Schools subcommittee composed of elected and staff leadership. A joint Council-Board budget work session occurs in late February (after the release of the City Manager's proposed budget).

ACPS Staff Thoughts on Streamlining Opportunities

BAC explored opportunities for streamlining the budget process with ACPS budget staff, beginning with the budget development process. ACPS budget staff noted several downsides to trying to shorten the timeline leading up to the Superintendent's proposed budget release, going so far as to say it would be practically "impossible." One cited risk of shortening the budget development timeline would be to reduce opportunities for staff engagement. ACPS budget staff described a robust, deliberative process between its office and other ACPS leaders as the budget is refined and developed. Faced with a reduced timeline, ACPS budget staff might need to make quicker, final decisions on smaller questions where otherwise they'd prefer to engage with responsible staff. In making this point, ACPS budget staff noted that even budgetary decisions that appear data or formula driven can have nuances with respect to staffing or individual school needs that they like to have time to assess with staff and, as described above, some of those decisions are dependent on data that is received during the Fall months.

ACPS budget staff also voiced concern about its capacity to move the budget more quickly. As it is, the ACPS budget staff is hard pressed to complete the 500 page budget book and related materials by the Superintendent's early January release, and this requires working over the Winter break. (It is worth noting that the length of the ACPS budget book rivals other jurisdictions's entire budget for city and schools combined.) If ACPS budget staff were forced to move the release of the Superintendent's proposed budget to December (a month earlier) it'd only have 3-4 weeks from the receipt of enrollment figures and other key data received in November (if timely received) to put together 75% of the budget and publish a 500 page document. ACPS budget staff raised concerns that this would necessarily impact the quality of the proposed budget, with less time to conduct due

diligence on budget items, develop justifications for budget changes, solicit feedback from ACPS staff and other stakeholders, and perform a true analysis. In sum, they felt that the quality of the budget might be compromised by pushing it back into December.

In BAC's view, the availability of key data is a significant barrier to moving the Superintendent's budget release much earlier. That said, there may be opportunities for streamlining things during the Fall that would free up ACPS budget staff to work on the Combined Funds budget and result in some efficiencies. For example, there may be opportunities to consolidate the budget priorities and engagement guidance process in the early Fall. ACPS budget staff mentioned that moving the CIP budget process earlier might also open up some additional staff time to work on the operating budget. This could be feasible since there is not as much dramatic movement from year to year in the CIP budget. These opportunities are explored in more detail in BAC's recommendations.

In contrast, ACPS budget staff felt that looking for efficiencies in the timeline after the budget is presented in January would be a more promising area to examine.

In Section D of the School Board's policies, [Board policy](#) DB requires that the calendar include "at least one work session for reviewing the budget and at least one public hearing on the budget." For the CIP budget there were two work sessions, two add/delete sessions, and a public hearing (held on the same day as one of the work sessions). For the Combined Funds budget, there were another two work sessions, two add/delete sessions, and two public hearings (both held on dates of other regularly scheduled Board meetings). In addition, there is a public hearing, work session, and add/delete session scheduled for the adjusted CIP and Combined Funds budgets (after the City's budget is finalized). [Note - these are in addition to the budget work sessions and combined CIP/CF public hearing that occur in August-October, prior to budget releases.]

ACPS staff noted that public hearings can be hard to place. This year, the Board wanted to do two public hearings, at least one before add/deletes. Board members have found it important to have public hearings early on, in advance of their opportunity to ask questions, so that their questions can be informed by feedback from the community. This has been viewed as preferable to holding them during or after the add/delete process, which leaves little time or opportunity to react to public comments. However, ACPS budget staff report that public participation in these public hearings has been uneven. Another observation made was that multiple public hearings dedicated to the budget are perhaps unnecessary, since there is an opportunity to provide public comment at every Board meeting. Finally, another observation was that while add/deletes are often scheduled for multiple meetings, the second add/delete is often ultimately unnecessary.

The above observations are incorporated into BAC's recommendations below.

On the question of alignment with the City calendar, ACPS staff observed that Board approval would have to move up significantly to be meaningful. A Board vote just a few days before the City Manager's proposed budget release, which might be viewed as symbolically important, is unlikely to provide any meaningful opportunity to change the trajectory of budget decision-making. In reality, the City's budget is well into its development even before the Superintendent releases his budget in early-January, and ACPS represents approximately 1/3 of that budget. The City would be unlikely to make large changes to the budget unless it had significant lead time. For example, if the Board votes and asks for an additional \$10M more than what the Superintendent proposes, the City might be hard pressed to make that change in January or February. They'd need to approve that kind of

increase earlier. However, the Council does have the opportunity to reallocate or identify additional revenue through its own budget process after the City Manager's budget is released. For that reason, a Board budget that exceeded the Superintendent's proposed budget might still be considered by the Council. As discussed below, these dynamics make frequent and open communication between ACPS and the City all the more important.

Comparison with other Jurisdictions

BAC examined the school budget process in four neighboring or comparable jurisdictions that were identified in consultation with ACPS budget staff: Arlington County, Fairfax County, City of Newport News, and City of Richmond. BAC's examination was focused generally on timing and sequencing of budget decision-making by School Board and City/County officials and the components of the budget process, and specifically on the following areas:

1. review of budget calendar(s) with attention to key dates including the release of the proposed budget by the Superintendent to the School Board; School Board vote on Superintendent's proposed budget; release of City/County proposed budget by City Manager/County Executive or equivalent; and City/County vote on final budget;
2. formal interplay between School Board and City/County around budget setting (e.g., joint budget work sessions, meetings, etc.);
3. level of public engagement during School Board budget process (e.g., community budget forum, public hearings, etc.);
4. rules of engagement for budget process (e.g., add/deletes, etc.); and
5. whether, how and when budget priority setting is made and how it is incorporated into budget planning and decision making.

BAC's examination was almost exclusively based on publicly available information. The budget calendars of these jurisdictions are included in the Appendix for reference.

BAC made some general observations of how Alexandria's process compares to the other jurisdictions studied:⁶

1. Alexandria's timeline for setting budget priorities is fairly comparable to the other jurisdictions studied.
2. The date that the Superintendent releases his or her budget to the School Board is fairly similar across jurisdictions. For example, for FY22 the Alexandria and Fairfax County Superintendents released proposed budgets on the same date (January 7). In Arlington and the City of Richmond, the Superintendent releases the budget in February.
3. Several jurisdictions have a fairly truncated deliberation process. For example, the City of Richmond examines the Superintendent's proposed budget for about one month before it is approved and sent on to the Mayor.
4. Alexandria is somewhat of an outlier in having the School Board approve the Superintendent's proposed budget *after* the general budget is proposed by the City Manager/Executive to the City/County governing body. For example, the Fairfax County School Board approves its budget five days before the County Executive releases the County proposed budget, and the City of Richmond School Board also adopts its budget before

⁶ There were also some differences in how capital budget decisions were made, but BAC did not thoroughly examine in light of its focus on the operating funds side of the budget process.

submission to the City Council for inclusion in the Mayor's budget proposal. However, in Arlington County, it appears that the County budget is proposed before the Superintendent issues the school budget.

5. Alexandria's budget calendar offers more formal opportunities for public engagement during the budget process than other jurisdictions. For example, the Alexandria School Board holds approximately 5 budget-related public hearings (1 CIP/CF, 1 CIP, 2 CF, 1 Adj. Budget) plus a Community Budget Forum throughout the budget process. In contrast, the City of Richmond offers only one public hearing before its School Board, but offers other opportunities for public engagement through the City's budget process. Arlington has 3 public hearings before the School Board (2 CF, 1 CIP), with Fairfax School Board offering 3-5 hearings (2 of those hearings were 'extra' dates, only if needed).
6. It also appears that Alexandria includes more work and related (i.e., add/delete) sessions than other jurisdictions. For example, Alexandria holds 14 budget related work sessions (3 general, 4 CIP, 4 CF, 3 Adj. Budget), as opposed to 9 for Arlington (6 CF, 3 CIP) and 6 in Fairfax County.
7. Alexandria's budget calendar seems to offer slightly more formal opportunities for the School Board and Council to meet around budget setting (e.g., priority setting, joint budget work sessions, meetings, etc.) although this is common among all jurisdictions.

Recommendations

Based on the information, feedback, and analysis described above, BAC has developed the following recommendations for the Board's consideration:

1. **The Board should adopt a budget calendar that allows for a Board vote on the Superintendent's proposed budget before the City Manager budget release to the Council.** Every effort should be made to schedule the Board's vote as far in advance of the City Manager's budget release as possible in order to be meaningful. It is BAC's view that this sequencing is in keeping with and will reinforce the Board's appropriate governance role, allow for productive Board feedback on the Superintendent's proposed budget, and demonstrate to the Council and the community that the staff and Board are aligned in the assessment of its needs. ***Moving up the adoption date will require changes to the budget calendar, however. BAC has included some suggestions for where the calendar might be changed in order to allow for an earlier adoption date. These should be considered by ACPS budget staff and the Board when coming up with proposals for the FY23 Budget Calendar, as referenced below.***
2. **The Board should continue to have robust engagement with the Council on budget related issues both before and during the budget process.** Not only is this level of public engagement good governance, but it allows the Board to communicate frequently with the Council on its budget views and preview any discussions that might occur during the approval process for the Superintendent's proposed budget – knowing that the time between that vote and the release of the City Manager's budget will be short, even if better aligned. Most importantly, if the Board is interested in pursuing a significant fluctuation from the prior year, it would behoove the Superintendent and Board to preview that to the City Manager and City Council as early as possible to allow for planning.

3. **ACPS should consider preparing a list of “reach” items beyond the Superintendent’s proposed budget that could be pursued with additional funding.** ACPS’ practice appears to be to produce proposed budgets that generally comport with the budget guidance issued by the City in the Fall. While this ensures a narrowly tailored and realistic budget that fits within the funds that can be reasonably expected to be available to ACPS, it doesn’t allow for the identification of additional or expanded budget items that might be pursued should additional funding be identified or secured. As noted above, the Council does have opportunities to raise revenue through its budget process that, theoretically, could be utilized to expand ACPS’ budget in order to fund additional budget items. In BAC’s view, this “reach” budget would be an invaluable tool for the Board, community members, and individual Councilmembers as they engage in City-level public engagement on the budget. And it may better reflect the true budget needs ACPS has assessed in order to maintain the type of school system it believes is in the best interest of the community.

4. **The Board should revamp its public engagement on budget issues to be more equitably accessible, meaningful, and efficient, in keeping with the Board’s stated equity and inclusion goal. ACPS and the Board should create a detailed and actionable communication plan related to budget-related engagement.** Giving parents and community members multiple ways to engage that do not require physically appearing at a public hearing would allow for more equitable access to providing feedback to the Board. This approach, while independently valuable, may also create opportunities to streamline the budget calendar to allow for the alignment referenced above. It may seem counterintuitive to adjust or reduce formal public engagement calendar items on an issue as critical as the budget, but in BAC’s view, “bigger is not better.” ACPS public engagement opportunities like the Community Budget Forum and public hearings on the budget are often poorly attended and participation is not diverse, nor representative of the community. BAC’s view is that being more strategic, deliberate, and targeted with public engagement might yield better results. Further, equity demands engagement opportunities other than formal public hearings.

Elements of this budget engagement plan should include:

- a. multiple modes of communication, genuine collaboration, and engagement with external stakeholders;
- b. a work plan calendar that allows for sufficient notice to the public for budget-related opportunities/events;
- c. a consideration of how this engagement translates to community members who do not have family members enrolled in ACPS, with emphasis for the importance of investment in ACPS as a community good;
- d. means to solicit participation from ACPS families and the larger community in its various budget-related public engagement tools well in advance using email, text, and more on-the-ground outreach, such as through the FACE Center, PTAC, PTAs, and other community groups (e.g., Casa Chirilagua);
- e. use of online tools like a survey/comment page on Division’s budget page (e.g., used in Fairfax County and Newport News) to solicit feedback on the budget; and
- f. acceptance of written comments (in lieu of live testimony) during Board meetings and public hearings and continued allowance of video, rather than in-person testimony; consider tools like “think tank” that promote interactive engagement during public hearings or other forums

5. **The Community Budget Forum, traditionally held in October, has been a missed opportunity for public engagement and should be revamped if continued.** ACPS should reconsider its goals in offering the Community Budget Forum (i.e., education about the budget process, soliciting feedback on budget priorities, reviewing the content of the budget, or something else) and whether the format and timing is appropriate. It may be that other public engagement approaches, as described above, would be more effective in meeting ACPS's goals here. If the event is continued, ACPS budget staff should partner with the FACE Center, PTAC, or other entities well in advance to gain feedback on program format and ideas for generating interest and participation. BAC is of course also willing to be a partner in this effort.
6. **If it had a full complement of members,⁷ BAC might also be utilized to solicit and synthesize public feedback on the budget and then submit it to the School Board for its consideration.**
7. **ACPS budget staff has made positive improvements to the website in the past several years – ACPS should continue to pair the public engagement opportunities listed above with robust public information on budget-related issues (e.g., interactive and educational materials on ACPS budget web page).**
8. **ACPS' efforts to improve its budget-related communications through use of short, digestible fact sheets and on the budget "telling a story," etc. should be pursued.** For example, the published budget calendar, while comprehensive, is hard to read and could be streamlined for public-facing communications.
9. **In consultation with the Board, ACPS budget staff should examine developing a streamlined and simplified version of the Budget book without losing the necessary information and analysis to make informed decisions.** The development of the budget book requires significant staff time. Further, at nearly 500 pages, the budget book is challenging for the public (and presumably Board members) to digest. Streamlining this document should have the additional benefit of freeing up budget staff to work on the development of the Combined Funds budget.
10. **ACPS budget staff, in consultation with the Board, should propose several versions of the FY23 Budget Calendar for the Board to consider, consistent with the observations and recommendations included in this memo.** Specific ideas for streamlining the budget calendar are listed below. Each comes with trade offs, but should be considered:

Priority Setting, Rules of Engagement, and Initial Public Engagement Stage

- Reduce the budget-related work sessions in September to one work session to discuss calendar, process, rules of engagement, priorities, and fiscal forecast (i.e., combine work sessions that were held on 9/10 and 9/17)

⁷ For at least the last two years, BAC has not enjoyed a full complement of members. Having a group of 4 or 5 people is insufficient for BAC to perform its functions robustly. BAC recommends the Board develop a strategy to expand participation in BAC and other advisory committees. A procedure where each Board member designates a member (similar to BFAAC) may be advisable.

- Replace the Community Budget Forum (held on 10/19) with alternative communication channels as described earlier. If the Community Budget Forum continues to be held, it should be vastly reformatted to ensure broader, more equitable public engagement, and could be combined with the public hearing (as described below).
- If the Community Budget Forum is held, consider combining it with the CIP/CF public hearing (held on 10/1) and involve all Board members as an opportunity to receive public comment. Even if the Community Budget Forum is not held, the Board may still wish to eliminate a formal CIP/CF public hearing and pursue alternate channels to receive public comment.

CIP Budget Process Stage

- Consider presenting the substantive presentations typically shared during subsequent work sessions on the date that the Superintendent releases the proposed CIP budget (held on 11/12). This might present opportunities to accelerate subsequent work sessions, questions and add/deletes.⁸
- Hold a public hearing after these substantive presentations to receive public comment, but pursue other engagement opportunities (as described above). If you cannot reduce the work sessions to one session (per below) combine the first work session with the public hearing.
- Reduce the two CIP-related work sessions (held on 11/16 and 11/23) to one work session in November; consider whether that should happen before or after the Joint City Council/School Board work session
- Reduce the two CIP Add/Delete sessions (held on 12/9 and 12/15) to one session.

Combined Funds Budget Process Stage

- Consider presenting the substantive presentations typically shared during subsequent work sessions on the date that the Superintendent releases the proposed CF budget (held on 1/7). This might present opportunities to accelerate subsequent work sessions, questions and add/deletes.
- Hold a public hearing after these substantive presentations to receive public comment, but pursue other engagement opportunities (as described above). If you cannot reduce the work sessions to one session (per below) combine the first work session with the public hearing.
- Reduce the two CF-related work sessions (held on 1/14 and 1/28) to one work session; consider whether that should happen before or after the Joint City Council/School Board work session.
- Reduce the two CF Add/Delete sessions (held on 2/10 and 2/16) to one session.

Conclusion

BAC is pleased to submit this information and these recommendations to the Board for its consideration. We stand ready to support the Board and ACPS budget staff as it pursues planning towards its FY23 budget process and beyond.

⁸ For example, Arlington County School Board has its first budget work session on the same day that the Superintendent releases his proposed budget.

APPENDICES

- A BAC 2020-2021 Scope of Work (includes BAC Report on Budget Feedback)
- B ACPS FY22 Budget Calendar
- C Other Budget Calendars (Arlington Cty, Fairfax Cty, City of Newport, City of Richmond)

MEMORANDUM

DATE: January 19, 2021

TO: Members of the Alexandria City School Board

FROM: Budget Advisory Council
Erin Dahlin (Chair); Nancy Drane (Secretary); Sean McEneaney; Sukumar Rao

SUBJECT: 2020-2021 Scope of Work

CC: Dominic Turner, ACPS Chief of Financial Services
Robert Easley, ACPS Director of Budget, Financial Systems, and Reporting
Kathy Stenzel, Alexandria City Budget and Fiscal Affairs Advisory Committee

The School Board Budget Advisory Committee (BAC) has developed the following scope of work document for the School Board's review.

During the 2019-2020, BAC surveyed School Board members for input on the scope of BAC's activities and desired outcomes from the perspective of the School Board. One clear issue that arose during the interviews with School Board members was a deeper look into the sequencing of the City and ACPS' Budget Calendar and, in particular, concerns around the alignment between City and School Board budget review and approval. The most prominent concern voiced by School Board members is the fact that historically, the City Manager releases his proposed budget (including the ACPS appropriation) *before* the School Board has formally approved the Superintendent's proposed operating funds budget.

Between now and May 2021, BAC will explore the City and ACPS budget calendar timelines with the goal of developing a set of recommendations for addressing the set of concerns that have been raised by School Board members in the past. While the sequencing of decision-making is the one point that has garnered the most focus, there could be other things BAC will discover about the sequencing writ large. BAC's effort will include an analysis of surrounding and/or comparable jurisdictions.

BAC's Scope of Work will include the following:

- an overview of the ACPS budget calendar process and the identification of any and all sequencing concerns with the City budget calendar;
- identification and exploration of the most significant impediments to aligning the School Board and City budget calendars;
- comparisons from other neighboring or comparable jurisdictions;
- consideration of potential adjustments that could be made to align the sequencing, with an exploration of the pros and cons of each adjustment; and

- exploration of the efficacy of other budget-related events (e.g., Community Budget Forum) (as time allows).

In order to advance this Scope of Work, BAC members will endeavor to study other jurisdictions in neighboring or comparable jurisdictions. In addition, recognizing that there is additional coordination that happens outside of the published calendar, BAC members will interview ACPS and City staff to explore relevant issues.

BAC has received guidance that having its memo available to the School Board in May 2021 will be sufficient to allow for its consideration before the 2021-2022 budget calendar is proposed by ACPS in approximately June 2021.

BAC appreciates the School Board's support of its work and will endeavor to continue to provide the best recommendations possible on the budget and fiscal affairs of Alexandria City Public Schools.

FY 2022 Budget Calendar

July 2020							August 2020							September 2020							October 2020						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4						1			1	2	3	4	5					1	2	3	
5	6	7	8	9	10	11	2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10
12	13	14	15	16	17	18	9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17
19	20	21	22	23	24	25	16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24
26	27	28	29	30	31	23	24	25	26	27	28	29	27	28	29	30	25	26	27	28	29	30	31				
							30	31																			
							SB Preliminary Two-by-Two Meetings (CF & CIP)							SB Preliminary Two-by-Two Meetings (CF & CIP)													

November 2020							December 2020							January 2021							February 2021							March 2021						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7			1	2	3	4	5					1	2		1	2	3	4	5	6		1	2	3	4	5	6	
8	9	10	11	12	13	14	6	7	8	9	10	11	12	3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
15	16	17	18	19	20	21	13	14	15	16	17	18	19	10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
22	23	24	25	26	27	28	20	21	22	23	24	25	26	17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
29	30	27	28	29	30	31	24	25	26	27	28	29	30	28	28	29	30	31	28	29	30	31												
TBD City Mgr Prop Guidance & Rev Outlook													31																					

April 2021							May 2021							June 2021							July 2021							School Board Deadlines (By Noon)						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	Date	Item					
				1	2	3						1		1	2	3	4	5				1	2	3	11/17	Questions Due								
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10	12/01	Add/Deletes Due					
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17	12/07	Co-Sponsorships Due					
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24	Combined Funds						
25	26	27	28	29	30	23	24	25	26	27	28	29	27	28	29	30	25	26	27	28	29	30	31	01/22	Questions Due									
TBD City Council Add/Delete Session #1							30	31												02/02	Add/Deletes Due													
TBD City Council Add/Delete Session #2																									02/08	Co-Sponsorships Due								
TBD City Council Adoption of Tax Rate, General Fund, and CIP Budgets																									Combined Funds and CIP									
																									05/07	Questions Due								
																									05/13	Add/Deletes Due								
																									05/17	Co-Sponsorships Due								

FY 2022 Budget Calendar

Date	Description	Combined Funds (CF)	Capital Improvement Program (CIP)
Thursday, August 27, 2020	School Board Retreat/Work Session		
August/September 2020	School Board Preliminary Two-by-Two Meetings with Superintendent and CFO Begin on Combined Funds (CF) School Board Two-by-Two Meetings with Superintendent and Executive Director Begin on Capital Improvement Program (CIP)	X	X
Monday, September 7, 2020	Labor Day: ACPS Schools and Administrative Offices Closed		
Thursday, September 10, 2020	School Board Work Session: Budget Calendar, Budget Process Resolution, Rules of Engagement, CF and CIP Budget Priorities, Discussion of CIP Format	X	X
Thursday, September 17, 2020	Regular School Board Meeting: Adoption of the Budget Calendar, Budget Process Resolution, Rules of Engagement	X	X
Thursday, September 17, 2020	School Board Work Session: Fiscal Forecast, High School Project	X	X
Monday, September 28, 2020	City Council/School Board Subcommittee Meeting		
Thursday, October 1, 2020	Regular School Board Meeting: Adoption of the CF and CIP Budget Priorities	X	X
Thursday, October 1, 2020	Public Hearing on the FY 2022 CF and FY 2022-2031 CIP Budgets	X	X
Thursday, October 15, 2020	Regular School Board Meeting		
Monday, October 19, 2020	Community Forum on the FY 2022 CF and FY 2022-2031 CIP Budgets	X	X
Monday, October 26, 2020	City Council/School Board Subcommittee Meeting		
Thursday, October 29, 2020	Regular School Board Meeting		
November 2020 (Estimate)	City Manager Proposed Guidance and Revenue Outlook	X	X
Thursday, November 12, 2020	Regular School Board Meeting: Presentation of the Superintendent's Proposed FY 2022-2031 CIP Budget (During Regular School Board Meeting)		X
Monday, November 16, 2020	School Board CIP Work Session #1 and CF Employee Compensation	X	X
Tuesday, November 17, 2020	City Council/School Board Joint Work Session on FY 2022-2031 CIP Budget		X
Tuesday, November 17, 2020	School Board Deadline to Submit Questions on the CIP Budget		X
Friday, November 20, 2020	Staff Deadline to Publicly Post Responses to School-Board Questions on the CIP Budget		X
Monday, November 23, 2020	Special Called School Board Meeting: Public Hearing on the FY 2022-2031 CIP Budget		X
Monday, November 23, 2020	City Council/School Board Subcommittee Meeting		
Monday, November 23, 2020	School Board CIP Work Session #2		X
Wednesday, November 25 - Friday, November 27, 2020	Thanksgiving Holiday: ACPS Schools and Administrative Offices Closed		
Tuesday, December 1, 2020	School Board Deadline to Submit CIP Add/Delete Requests to Staff (Due by Noon)		X
Thursday, December 3, 2020	Regular School Board Meeting		
Friday, December 4, 2020	Staff Deadline to Compile CIP Add/Delete Log and Submit Back to School Board for Co-Sponsorships (Due by Noon)		X
Monday, December 7, 2020	School Board Deadline to Submit CIP Add/Delete Co-Sponsorships to Staff (Due by Noon)		X
Tuesday, December 8, 2020	Staff Deadline to Compile CIP Add/Delete Co-Sponsorships, Publicly Post Co-Sponsorships, and Publicly Post Updated Superintendent's Recommendations		X
Wednesday, December 9, 2020	School Board CIP Add/Delete Work Session #1		X
Wednesday, December 9, 2020	School Board Two-by-Two Meetings with Superintendent and CFO Begin on CF	X	
Tuesday, December 15, 2020	School Board CIP Add/Delete Work Session #2		X
Thursday, December 17, 2020	Regular School Board Meeting: Adoption of the FY 2022-2031 CIP (During Regular School Board Meeting) Presentation of FY 2020 CAFR	X	X
Monday, December 21, 2020 - Friday, January 1, 2021	Winter Break: ACPS Schools and Administrative Offices Closed		
Thursday, January 7, 2021	Regular School Board and Organizational Meeting: Presentation of the Superintendent's Proposed FY 2022 CF Budget (During Regular School Board Meeting)	X	
Thursday, January 14, 2021	School Board CF Work Session #1	X	
Monday, January 18, 2021	Martin Luther King Day: ACPS Schools and Administrative Offices Closed		
Thursday, January 21, 2021	Regular School Board Meeting		
Thursday, January 21, 2021	Public Hearing on the FY 2022 CF Budget	X	
Friday, January 22, 2021	School Board Deadline to Submit Questions on the FY 2022 CF Budget (Due by Noon)	X	
Monday, January 25, 2021	City Council/School Board Subcommittee Meeting		
Thursday, January 28, 2021	School Board CF Work Session #2	X	
Friday, January 29, 2021	Staff Deadline to Publicly Post Responses to School-Board Questions on the FY 2022 CF Budget	X	

Date	Description	Combined Funds (CF)	Capital Improvement Program (CIP)
Tuesday, February 2, 2021	School Board Deadline to Submit CF Add/Delete Requests to Staff (Due by Noon)	X	
Thursday, February 4, 2021	Regular School Board Meeting		
Thursday, February 4, 2021	Public Hearing on the FY 2021 CF Budget	X	
Friday, February 5, 2021	Staff Deadline to Compile CF Add/Delete Log and Submit Back to School Board for Co-Sponsorships	X	
Monday, February 8, 2021	School Board Deadline to Submit CF Add/Delete Co-Sponsorships to Staff (Due by Noon)	X	
Tuesday, February 9, 2021	Staff Deadline to Compile CF Add/Delete Co-Sponsorships, Publicly Post Co-Sponsorships and Publicly Post Updated Superintendent's Recommendations	X	
Wednesday, February 10, 2021	School Board CF Add/Delete Work Session #1	X	
Monday, February 15, 2021	President's Day: ACPS Schools and Administrative Offices Closed		
Tuesday, February 16, 2021 (Estimate)	City Manager Presents the City of Alexandria's FY 2022 Proposed Budget	X	X
Tuesday, February 16, 2021	School Board CF Add/Delete Work Session #2	X	
Thursday, February 18, 2021	Regular School Board Meeting: Adoption of the FY 2022 CF Budget (During Regular School Board Meeting)	X	
Monday, February 22, 2021	City Council/School Board Subcommittee Meeting		
Thursday, March 4, 2021	Regular School Board Meeting		
Thursday, March 04, 2021 (Estimate)	City Council/School Board Joint Work Session on the FY 2022 CF and FY 2022-2031 CIP Budgets	X	X
Tuesday, March 9, 2021 (Estimate)	City Council Introduces Tax rate Ordinance and Sets Maximum Tax Rate	X	X
Friday, March 12, 2021 (Estimate)	City Council Advertises Effective Tax Rates	X	X
Thursday, March 18, 2021	Regular School Board Meeting		
Monday, March 22, 2021	City Council/School Board Subcommittee Meeting		
Monday, March 29 - Friday, April 2, 2021	Spring Break: ACPS Schools and Administrative Offices Closed		
Thursday, April 8, 2021	Regular School Board Meeting		
Thursday, April 22, 2021	Regular School Board Meeting		
Monday, April 26, 2021	City Council/School Board Subcommittee Meeting		
April 2021 (Estimate)	City Council Add/Delete Session #1	X	X
April 2021 (Estimate)	City Council Add/Delete Session #2	X	X
April 2021 (Estimate)	City Council Adoption of Tax Rate, FY 2022 General Fund, and FY 2022-2031 CIP Budgets	X	X
Thursday, May 6, 2021	Regular School Board Meeting: Superintendent's Adjusted Proposed Budget on the FY 2022 CF and FY 2022-2031 CIP Budgets	X	X
Thursday, May 6, 2021	School Board CF and CIP Work Session	X	X
Friday, May 7, 2021	School Board Deadline to Submit Questions on the FY 2022 CF and FY 2022-2031 CIP Budgets (Due by Noon)	X	X
Tuesday, May 11, 2021	Staff Deadline to Publicly Post Responses to School-Board Questions on the FY 2022 CF and FY 2022-2031 CIP Budgets	X	X
Thursday, May 13, 2021	School Board Deadline to Submit CF and CIP Add/Delete Requests to Staff (Due by Noon)	X	X
Friday, May 14, 2021	Staff Deadline to Compile CF and CIP Add/Delete Log and Submit Back to School Board for Co-Sponsorships	X	X
Monday, May 24, 2021	City Council/School Board Subcommittee Meeting		
Monday, May 17, 2021	School Board Deadline to Submit CF and CIP Add/Delete Co-Sponsorships to Staff (Due by Noon)	X	X
Wednesday, May 19, 2021	Staff Deadline to Compile CF and CIP Add/Delete Co-Sponsorships, Publicly Post Co-Sponsorships and Publicly Post Updated Superintendent's Recommendations	X	X
Thursday, May 20, 2021	Regular School Board Meeting		
Thursday, May 20, 2021	School Board CF and CIP Add/Delete Work Session #1	X	X
Thursday, May 20, 2021	Public Hearing on the FY 2022 CF and FY 2022-2031 CIP Budgets	X	X
Thursday, May 27, 2021	School Board CF and CIP Add/Delete Work Session #2, If Needed	X	X
Monday, May 31, 2021	Memorial Day: ACPS Schools and Administrative Offices Closed		
Thursday, June 3, 2021	Regular School Board Meeting: Adoption of the Final FY 2022 CF and FY 2022-2031 CIP Budgets (During Regular School Board Meeting)	X	X
Thursday, June 17, 2021	Regular School Board Meeting		
Monday, June 28, 2021	City Council/School Board Subcommittee Meeting		



ARLINGTON
PUBLIC
SCHOOLS

BUDGET DEVELOPMENT CALENDAR



FISCAL YEAR
2022

www.apsva.us



ARLINGTON, VIRGINIA

JULY 2020

S	M	T	W	T	F	S
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AUGUST 2020

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SEPTEMBER 2020

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OCTOBER 2020

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NOVEMBER 2020

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29	30					

DECEMBER 2020

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JANUARY 2021

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FEBRUARY 2021

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28						

MARCH 2021

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21	22	23	24	25	26	27
28	29	30	31			

APRIL 2021

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MAY 2021

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16	17	18	19	20	21	22
23	24	25	26	27	28	29

JUNE 2021

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27	28	29	30			

JULY	
1	Consent Item - Budget Development Calendar – FY 2022 Budget and FY 2022-26 CIP
3	HOLIDAY
AUGUST	
13	Administrative Conference
SEPTEMBER	
TBD	Board Information Item – School Board FY 2022 Budget Direction
4	HOLIDAY
7	HOLIDAY
8	First Day of School
OCTOBER	
TBD	Board Action Item – School Board FY 2022 Budget Direction
NOVEMBER	
11	HOLIDAY
26-27	HOLIDAY
DECEMBER	
TBD	Board Information Item – FY 2020 Final Fiscal Status Report
8	Joint Work Session with County Board (TENTATIVE)
24-25	HOLIDAY
31	HOLIDAY

JANUARY	
TBD	Board Action Item – FY 2020 Final Fiscal Status Report
1	HOLIDAY
18	HOLIDAY
FEBRUARY	
15	HOLIDAY
25	Board Presentation – Superintendent’s Proposed FY 2022 Budget
25	Budget Work Session #1 Following Board Meeting
MARCH	
TBD	School Board Presentation of budget to Civic Federation
TBD	Public Hearing on County Budget
TBD	Public Hearing on Tax Rate
9	Budget Work Session #2
16	Budget Work Session #3
23	Budget Work Session #4
23	Public Hearing on Superintendent’s Proposed Budget
29-31	Spring Break
APRIL	
1-2	Spring Break
6	Budget Work Session #5

8	Board Action Item – School Board’s Proposed FY 2022 Budget
9	School Board presentation to County Board (TENTATIVE)
29	Public Hearing on School Board’s Proposed Budget
MAY	
4	Budget Work Session #6
6	Board Action Item – School Board’s Adopted FY 2022 Budget
6	Board Information Item – Superintendent’s Proposed FY 2022-26 CIP
11	CIP Work Session #1
25	CIP Work Session #2
25	Public Hearing on Superintendent’s Proposed FY 2022-26 CIP
31	HOLIDAY
JUNE	
TBD	County Board adoption of FY 2022-26 CIP
4	Joint Work Session with County Board (TENTATIVE)
15	CIP Work Session #3
24	Board Action Item – School Board’s Adopted FY 2022-26 CIP

- School Board Meeting
- Holiday
- Committee of the Whole Meeting
- Spring Break
- School Board Work Session

FY 2022 BUDGET DEVELOPMENT CALENDAR

June-December 2020	FCPS conducts internal program reviews and gather community and employee feedback
September 17	School Board conducts budget work session on budget priorities
October 29	Program Budget Review
November 4	School Board work session on FY 2022 Fiscal Forecast
November 24	Joint Meeting with Board of Supervisors to discuss FY 2022 Forecast
December 8	Program Budget Review
January 7	Superintendent release FY 2022 Proposed Budget
January 12	School Board Work Session
January 19	Program Budget Review
January 26	School Board holds public hearings on budget
January 27	School Board holds public hearings on budget (if needed)
January 27	School Board conducts budget work session
February 16	Program Budget Review
February 18	School Board adopts FY 2022 Advertised Budget
February 23	Fairfax County Executive presents FY 2022 Advertised Budget
March 2	Program Budget Review
March 2	Joint Meeting with Board of Supervisors to discuss FY 2022 Budget and tax rates
March 9	Board of Supervisors advertises tax rate
April 6	Program Budget Review
April 13	School Board budget presentation to Fairfax County Board of Supervisors
April 13-15	Fairfax County Board of Supervisors conducts public hearings on budget
April 23	Fairfax County Board of Supervisors Budget Pre-Markup
April 27	Fairfax County Board of Supervisors FY 2022 budget markup, determine budget package, and tax rates
May 4	County Board of Supervisors adopt FY 2022 budget, tax rates, and transfer to FCPS
May 4	FY 2022 Budget Work Session
May 6	FY 2022 Approved Budget presented to School Board
May 11	School Board holds public hearings on budget
May 12	School Board holds public hearings on budget (if needed)
May 18	School Board conducts budget work session
May 20	School Board adopts FY 2022 Approved Budget
July 1	FY 2022 begins
*All Dates Tentative	



2020-2021 School Board Meetings

July 2020

M	T	W	T	F
		①	2	3
6	7	8	9	10
13	14	15	16	17
⑳	21	22	23	24
27	28	29	30	31

August 2020

M	T	W	T	F
3	④	5	6	7
10	11	12	13	14
17	⑱	19	20	21
24	25	26	27	28
31				

July

- 1 Organizational Meeting 9:00 a.m.
- 20 Special Meeting 5:00 p.m..

August

- 4 Board Retreat 9:00 a.m.
- 18 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.

September 2020

M	T	W	T	F
	1	2	3	4
7	★ 8	9	10	11
14	⑮	16	17	18
21	22	23	24	25
28	29	30		

October 2020

M	T	W	T	F
			1	2
5	6	7	8	9
12	13	14	15	16
19	⑳	21	22	23
26	27	28	29	30

September

- 8 First Day of School
- 15 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.

October

- 20 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.

November 2020

M	T	W	T	F
2	3	4	5	6
9	10	11	12	13
16	⑰	⑱	⑲	⑳
23	24	25	26	27
30				

December 2020

M	T	W	T	F
	1	2	3	4
7	8	9	10	11
14	⑮	16	17	18
21	22	23	24	25
28	29	30	31	

November

- 17 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.
- 18-20 VSBA Annual Convention

December

- 15 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.

January 2021

M	T	W	T	F
				1
4	5	6	7	8
11	12	13	14	15
18	⑰	20	21	22
25	26	27	28	29

February 2021

M	T	W	T	F
1	2	3	4	5
8	9	10	11	12
15	⑰	17	18	19
22	23	24	25	26

January

- 19 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.

February

- 16 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.
- (Operating Budget Presentation)

March 2021

M	T	W	T	F
1	2	3	4	5
8	⑨	10	11	12
15	⑰	17	18	19
22	⑳	24	25	26
29	30			

April 2021

M	T	W	T	F
			1	2
5	6	7	8	9
⑫	13	14	15	16
19	⑳	21	22	23
26	27	28	29	30

March

- 9 Board Meeting 6:30 p.m.
- (Operating Budget Presentation)
- 16 Public Hearing 6:30 p.m.
- 23 Board Meeting and Budget Approval 6:30 p.m.

April

- 10-12 NSBA National Conference
- 20 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.

May 2021

M	T	W	T	F
3	4	5	6	7
10	11	12	13	14
17	⑱	19	20	21
24	25	26	27	28
31				

June 2021

M	T	W	T	F
	①	2	3	4
7	8	9	10	11
14	⑮	16	17	18
21	22	23	24	25
28	29	30		

May

- 18 Work Session 5:00 p.m.
- Board Meeting 6:30 p.m.
- TBD School Board Development

June

- 1 Special Meeting (Personnel Actions) 5:00 p.m.
- 15 Board Meeting 6:30 p.m.

 Retreats ● Budget
 Organizational/Special Meeting □ Conferences/Conventions
 Work Session & Board Meeting ● Public Hearings

School Board meetings are televised live and rebroadcast on NNPS-TV.

NNPS Budget Timeline

- **November 2020**

Budget requests due to Budget Department.

- **November-December 2020**

Budget Office reviews budget requests and completes spending projections.

- **February 16, 2021**

Estimate of needs presented to School Board, NNPS Administration Building, 5 p.m.

- **March 9, 2021**

Presentation of Superintendent's Proposed Budget to the School Board, NNPS Administration Building, 6:30 p.m.

- **March 16, 2021**

School Board Public Hearing on Superintendent's Proposed Budget, NNPS Administration Building, 6:30 p.m.

- **March 23, 2021**

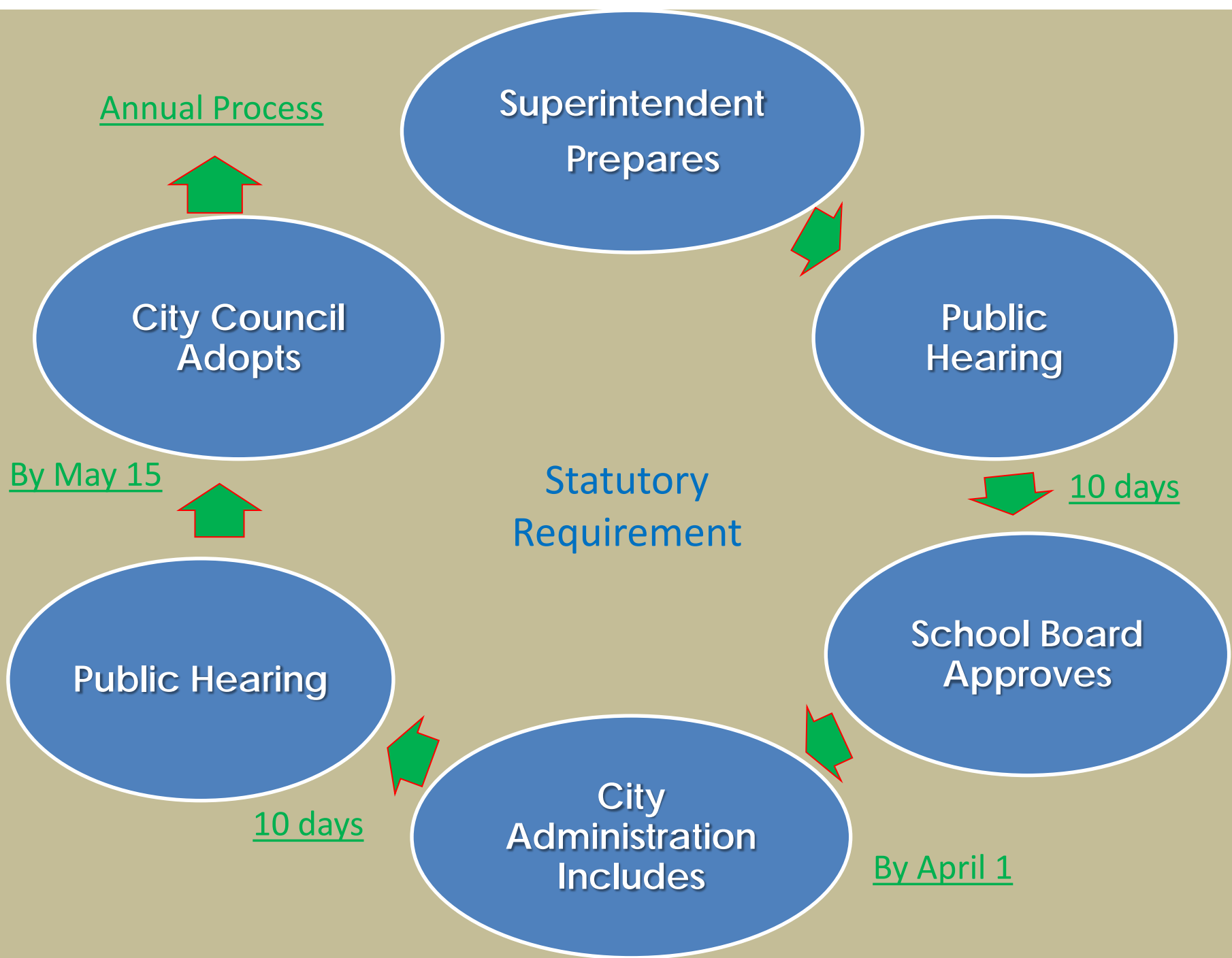
School Board Meeting and Budget Approval, NNPS Administration Building, 6:30 p.m.

- **April 2021**

City Council conducts two public hearings on proposed budget.

- **May 2021**

City Council appropriates funds for School Operating Budget (Code of Virginia §22.1-93).



MAYOR'S PROPOSED FY2020 - 2021 BUDGET

ANNUAL BUDGET PROCESS AND CALENDAR – FOR PUBLIC

Month	Activity
July	<p>The Department of Budget and Strategic Planning (DBSP) issues the current adopted budget document. City departments and agencies initiate the implementation of services, programs and projects in the adopted budgets. Annual performance reporting period also begins.</p>
August	<p>DBSP continues implementing Outcome Based Budgeting with migration toward a Performance and Priority based Strategic Management System. DBSP assists departments with the enhancement of departmental missions, program goals and program/service measures.</p>
September	<p>DBSP develops and issues instructions for the Multi-Year Forecast Process (expenditures and revenues). Departments are encouraged to submit information regarding regulatory requirements, legislative changes, contractual increases, demographic impacts and any other changes impacting revenues and expenditures. DBSP begins formulating preliminary guidelines for the upcoming capital and operating Budgets.</p> <p>End of FY2019 First Quarter.</p>
October	<p>DBSP prepares and finalizes the budget guidelines and the upcoming operating and capital budget instructions for FY2020/2021. DBSP analyzes Multi-Year Forecast submissions and develops initial recommendations for review by the Mayor and senior leadership.</p> <p>DBSP initiates review of citywide personnel and submits instructions to departments to review all positions (FTEs) and position allocations in preparation for “Budget Kickoff”.</p> <p>Notices of applications for requests of city funding – Non Departmental – are placed in local print media outlets indicating the date in which applications will be made available to the public.</p> <p>DBSP initiates capital “Budget Kickoff” – Distribution of instructions and guidelines to agencies for submitting capital requests for FY21 – FY25.</p>
Late October - Mid November	<p>DBSP formulates agency’s FY21 personnel budgets from returned personnel validations. Personnel budgets loaded in budget module.</p> <p>DBSP finalizes budget forms in budget module in preparation for operating budget kickoff.</p>

MAYOR'S PROPOSED FY2020 - 2021 BUDGET

Month

Activity

Non-Departmental applications are made publicly available on City website (both for general fund and federal funds).

Mayor, CAO, and DBSP initiate "Budget Kickoff" whereby the Mayor's priorities are articulated and submission guidelines and instructions are reviewed with departments.

DBSP facilitates departmental training on the budget submission forms and budget process.

Agencies begin preparing operating budget submissions/requests for FY21.

Mayor works with City Council to solicit feedback on their budget priorities for FY21.

Mayor works with RPS to solicit feedback on their budget priorities for FY21.

Late
November -
December

Departments submit capital budget requests to DBSP for review and analysis.

DBSP forwards all CIP project request to DPW for project costing verification.

December

Agencies continue to prepare operating requests.

Departments operating requests due to DBSP.

DBSP staff reviews the operating budget submissions – for alignment with Mayoral priorities - and makes initial recommendations to DBSP leadership for funding decisions.

DBSP meets with Finance staff to determine Debt (capital) affordability and reviews capital budget submissions.

DPU submits capital and operating budget requests to DBSP including any proposed rate changes.

Capital budget submissions for previously appropriated projects due.

DBSP provides preliminary capital budget funding recommendations for review to the DCAO for Finance and Administration, DCAO for Operations, and CAO.

MAYOR'S PROPOSED FY2020 - 2021 BUDGET

Month	Activity
January	<p>Superintendent presents Richmond Public Schools' (RPS) budget to School Board – to include local funding request from the City.</p> <p>DBSP leadership reviews staff recommendations on operating budget submissions and makes recommendations.</p> <p>Individual departmental work sessions are held with Mayor, CAO, DCAOs, and departments to review submissions and DBSP initial recommendations.</p> <p>Citywide stakeholders – CAO and DCAOs – review funding recommendations (operating and capital) from DBSP and from departmental work sessions and begin to formulate operating budget funding recommendations for the Mayor's review.</p> <p>Draft CIP recommendation is presented to the Mayor.</p> <p>Work sessions are held with the Mayor to discuss major funding issues and review CAO and staff's initial recommendations – both operating and capital. Discussions center on the inclusion of priority budget items, major unfunded issues, and balancing strategies, etc.</p> <p>Multi-Year (5 Year) Revenue and Expenditure Projections presented to City Council.</p>
February	<p>Continued work sessions with the Mayor to discuss major issues, balancing strategies, and make funding decisions for both the operating and capital budgets. Final funding decisions are completed for both the operating and capital budgets.</p> <p>RPS School Board adopts budget and presents local funding request to the Mayor.</p> <p>Final decisions by Mayor on operating, capital, and Non-Departmental budget are obtained.</p> <p>Completion of typing, editing, and proofing of recommended operating and capital improvement plan budget document.</p> <p>Completion of the CIP presentation for the Planning Commission.</p> <p>Printing and binding of budget documents.</p>
March - April	<p>On or before March 6th, the proposed capital budget is presented to the City Planning Commission. The Mayor later presents the proposed operating, capital, and other funds (by March 6th) to the City Council. DBSP distributes proposed budget documents to City Council, departments, and the public.</p>

MAYOR'S PROPOSED FY2020 - 2021 BUDGET

Month

Activity

City Council facilitates public budget work sessions to provide budget briefings to review the Mayor's proposed budgets.

April - May

Additional City Council public budget work sessions.

Public hearings are held on the proposed budgets.

City Council introduces amendments to the budgets – for all funds - and adopts the General Fund (no later than May 31st), Special Fund, Enterprise Fund, Capital, Debt Service, Richmond Public Schools, and Internal Service Fund budgets. City Council also adopts the Federal Funds budgets (CDBG, HOPWA and ESG.) separately.

June

DBS modifies all budgets in accordance with all of City Council's adopted amendments.

DBSP completes final revisions to the budget documents and prepares the new fiscal year budget to load into the financial system prior to July 1st.

		Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
SCHOOL BUDGET PROCESS														
Budget Work Sessions														
	Arlington											CIP WS	CIP WS	
	Fairfax*			9/17/20 Priorities WS 9/10/20 Priorities WS		11/4/20 Fiscal Forecast WS		1/5/21 CIP WS 1/12/21 CF WS 1/27/21 CF WS	2/16/21 CF WS			5/4/21 WS 5/18/21 WS		
	Alexandria Richmond		8/27/20 SB Retreat	9/17/20 Fiscal Forecast WS	10/1/20 Adopt Priorities	11/16/20 CIP WS 11/23/20 CIP WS	12/9/20 CIP Add/Delete ("+-") 12/15/20 CIP +/-	1/14/21 WS CF 1/28/21 WS CF	2/10/21 CF +/- 2/16/21 CF +/-			5/6/21 CF, CIP WS 5/20/21 CF, CIP +/- (+ 5/27 if needed)		
Public Hearings														
	Arlington													
	Fairfax							1/7/21 CIP 1/26/21 CF (+1/27 if needed)				5/11/21 CF (+ 5/12 if needed)		
	Alexandria Richmond				10/1/20 CF, CIP 10/19/20 Bug. Forum	11/23/20 CIP		1/21/21 CF	2/4/1 CF			5/20/21 CF, CIP		
	Newport News									March 16, 2021 Public Hearing				
Board Budget (CF)														
	Arlington								2/25/2021 Spdt's Proposed Budget		4/8/2021 SB Proposed Budget	5/6/2021 (SB Approved CF Budget)		
	Fairfax							1/7/21 Spdt's Proposed Budget	2/18/21 Budget Adopted			5/6/21 Prop. Budget to SB 5/20/21 Budget Adopted		
	Alexandria							1/7/21 Spdt's Proposed Budget	2/18/21 CF Budget Adopted			5/6/2021 Spdt's Adj. Proposed CF Budget	6/3/2021 Final CF Budget Adopted	

			Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
	Richmond								1/21/21 and 1/28/21 Budget Work Sessions	2/4/21 - Public Hearing Superintendent's Budget Presented to Board so it can be included in Mayor's Budget Submission in March 2/23/21 Last Meeting			Final Budget for Richmond Public Schools must be adopted by School Board NLT May 31st		
	Newport News						Budget Requests due to budget department	Budget Office Reviews and completes spending projections		Estimate of needs presented to School Board 2/16/21	Presentation of Superintendent's Proposed Budget to School Board 3/9/21 and Subsequent School Board Budget Approval March 23. 2021				
Board Budget (CIP)															
	Arlington												5/6/2021 Spdt's Adj. Proposed CIP Budget	6/24/21 SB Adoption of CIP Budget	
	Fairfax*							12/17/20 Proposed CIP		2/4/21 CIP Approved					
	Alexandria						11/12/20 Proposed CIP	12/17/20 CIP Adopted						6/3/2021 Final CIP Budget Adopted	
	Richmond								Draft CIP recommendation is presented to the Mayor	CIP Budget Presented to Planning Commission					
Joint SB and CC/CB Work Sessions															
	Arlington							JWS - CB/SB						JWS - CB/SB	
	Fairfax						11/24/20 JWS Fiscal Forecast				3/2/21 JWS Budget/Tax Rate	4/13/21 SB Present. to BOS			
	Alexandria				10/21/20 JWS CIP				2/22/21 JWS - CC/SB	3/4/21 JWS - CC/SB	4/26/21 JWS - CC/SB				
CITY/COUNTY PROCESS															
City/County Adoption of Budget															
	Arlington								County's Proposed Budget			County Adoption of Budget		TBD CB Adoption of CIP Budget	

		Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
	Fairfax								2/23/21 Cty Exec Proposed Budget	3/9/21 Advertise Tax Rate	4/13-15 Public Hgs	5/4/21 Adopt Budget, Tax Rates, Xfr to FCPS		
	Alexandria					City Manager Guidance			2/16/2021 City's Proposed Budget	3/12/21 Advertise Tax Rate	City Council Adoption of CF and CIP Budgets			
	Richmond				Citywide Budget Kickoff October 26, 2020				Budget adopted by school board before submission to City Council for inclusion in Mayors March budget	Mayor presents proposed operating, capital, and other funds by 3/6 to the City Council	Additional City Council public budget work sessions (Note, not School Board Sessions) - Public Hearings April and May	City Council introduces amendments to the budgets – for all funds - and adopts the General Fund (no later than May 31st) including Richmond Public Schools, City Council appropriates funds for School Operating Budget		
	Newport News										City Council hosts Public hearings			

Budget Work Sessions	Arlington	6
	Alexandria	10
	Fairfax*	7-12
CIP Work Sessions	Arlington	3
	Alexandria	4
	Fairfax	1
Public Hearings	Arlington	3
	Both CF and CIP Alexandria	5 plus budget forum
	Public Hearings CF (2- Fairfax)	3-5
Joint WS - CB/CC	Arlington	2
	Fairfax	3
	Alexandria	4

		Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
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*Fairfax does 2 work sessions before budget release, 3 b/f SB approval, 2 later after City budget # final. They also have 5 "Program

*Fairfax CIP funding appears to come from Bond Funding (\$180M/year); FCPS Operating Funds (routine maintenance/overcrowding

Budget Process Report, Considerations and Recommendations

ACPS – Budget Advisory Committee (BAC)

School Board Budget Work Session
May 20, 2021

Essential Questions

- How can the sequencing of the review and approval of the School Board and City Council budgets improve the School Board's authority and autonomy?
- How can the Board develop a more streamlined, efficient budget process?
- How can community engagement and feedback on budget-related issues be improved?

Background

- During 2019-2020, BAC surveyed School Board Members in an effort to more fully inform BAC’s 2020-21 Scope of Work and to find ways BAC could support the Board in its budget work.
- The School Board identified sequencing of the review and approval of the Board’s and City Council’s budgets as an issue for the following reasons:
 - Any Board vote adjusting the Superintendent’s proposed budget *after* the City Manager’s budget is released would be practically difficult to implement;
 - The current sequencing of the budget decisions undermined one of the primary roles and functions of the Board, to review and approve the Division’s budget; and
 - The City Manager publicly stating that he’s met ACPS’ funding request *before* the Board has approved the ACPS budget diminishes the Board’s role and autonomy.

Goals

- To develop a more streamlined, efficient budget process
- To explore issues within the budget process, such as:
 - Identify sequencing concerns between ACPS & the City's budget calendar;
 - Explore impediments to aligning the Board and City budget calendars;
 - Compare ACPS' budget calendar to other jurisdictions; and
 - Identify recommendations for a more streamlined and efficient budget process, with the related costs/benefits identified.
- Provide Budget Staff with information to inform development of several FY23 budget calendar options for the Board to review in June 2021

Components of the Budget Process

- Budget calendar, w/ attention to these key dates:
 - Superintendent release of proposed budget
 - School Board vote on Superintendent's Proposed Budget
 - Release of City/County proposed budget by the City Manager
 - City County Vote on the Final Budget
- Formal exchange between School Board and City/County around budget setting (e.g., joint budget work sessions, meetings, etc.);
- Level of public engagement during School Board budget process
 - Public Hearings and Community Forums
- Rules of engagement for budget process; and
- Whether, how and when budget priority setting is made and how it is incorporated into budget planning and decision making.

General Observations re: Comparisons with Surrounding Jurisdictions

- Timeline is comparable for priority setting and Superintendent's release of their proposed budget
- Deliberation process is truncated in other jurisdictions
- Alexandria somewhat of an outlier in having the Board approve the Superintendent's proposed budget after the general budget is released by the City Manager/Executive
- Alexandria offers more public engagement and work sessions
- More formal City/Schools engagement in Alexandria

Recommendations:

School Board, City Council Budget Timing and Engagement

- The School Board should adopt a budget calendar that allows for a Board vote on the Superintendent's proposed budget prior to the City Manager's budget release to the Council
- The Board should continue to have robust engagement with the Council on budget related issues both before and during the budget process
- ACPS should consider preparing a list of "reach" items beyond the Superintendent's proposed budget that could be pursued with additional funding

Recommendations:

Public Engagement on Budget Issues

- The Board should revamp its public engagement on budget issues to be more equitably accessible, meaningful, and efficient, in keeping with the Board's stated equity and inclusion goal.
- ACPS and the Board should create a detailed and actionable communication plan related to budget-related engagement.

Recommendations: Public Engagement (cont.)

- This plan should include:
 - multiple modes of communication and engagement opportunities for the community (e.g., text, e-mail, in-person, video, audio) - both in sending out *and* in receiving information/feedback
 - collaboration and engagement with external stakeholders (e.g., FACE, PTAC, community organizations like Casa Chirilagua)
 - sufficient notice to the public for budget-related opportunities/events
 - use of online tools (e.g., survey, comment page on Division website)
 - continued improvements to the website in order to pair public engagement opportunities with robust public information
 - use short, digestible fact sheets to “tell a story” about the budget

Recommendations: Public Engagement (cont.)

- Other recommendations
 - Revamp the Community Budget Forum, traditionally held in October (consider goals, format, timing, partnership, Board participation)
 - Utilize BAC to solicit public feedback on the budget to submit to the School Board for consideration.
 - Instead of live, in-person commentary, use written and virtual commentary at Board meetings and public hearings. Consider tools like “Think Tank” that promote interactive
- Consider how engagement translates to community members who do not have family members enrolled in ACPS; emphasize the importance of investing in ACPS as a community good

Recommendations – Internal ACPS Process

- ACPS budget staff should develop a streamlined and simplified version of the Budget book without losing information and analysis needed by the School Board to make informed decisions.
- ACPS budget staff should propose several versions of the FY23 Budget Calendar for the Board to consider, consistent with the observations and recommendations included in this memo.

Recommendations - Internal ACPS Budget Process

Priority Setting, Rules of Engagement, and Initial Public Engagement Stage

- Reduce the budget-related work sessions in September to one work session to discuss the budget calendar, budget process resolution, rules of engagement, priorities, and fiscal forecast
- Replace the Community Budget Forum with alternative communication channels or vastly reformat the forum to ensure broader, more equitable public engagement
 - Consider combining the Community Budget Forum with a public hearing
 - Involve all Board Members as an opportunity to receive public comment
 - Eliminate a formal CIP/CF Public Hearing and pursue alternate channels to receive public comment

Recommendations - Internal ACPS Budget Process

– CIP and CF Process

- Consider sharing substantive work session presentations on the date that the Superintendent releases the proposed CIP budget and CF budget in an effort to accelerate questions and add/deletes.
- Hold a public hearing after substantive budget presentations to receive public comment, but pursue other engagement opportunities. Consider reducing the number of work sessions by combining with a public hearing.
- Reduce the two CIP and CF work sessions to one work session; consider whether these work sessions should happen before or after the Joint City Council/School Board Budget Work Sessions in November and March
- Reduce the two CIP and CF Add/Delete work sessions to one

Questions?

Budget Advisory Committee:

Erin Dahlin, Chair

Nancy Drane, Secretary

Selena El Hajji

Sean McEneaney

Sukumar Rao

Robert Easley, Director, ACPS Budget and Fiscal Compliance

robert.easley@acps.k12.va.us

Ramee Gentry, School Board Member

ramee.gentry@acps.k12.va.us

Superintendent

Dr. Gregory C. Hutchings, Jr.

School Board

Meagan L. Alderton, Chair
Veronica Nolan, Vice Chair

Cindy Anderson

Ramee A. Gentry
Jacinta Greene
Margaret Lorber

Michelle Rief

Christopher A. Suarez
Heather Thornton

APPENDIX 3: ACPS STAFF RESPONSE TO BAC MEMO (JUNE 2021)

BOARD BRIEF

Date: May 27, 2021

BOARD INFORMATION: X

MEETING PREPARATION:

FROM: Dominic B. Turner, Chief Financial Officer

THROUGH: Gregory C. Hutchings, Jr., Ed.D., Superintendent of Schools

TO: The Honorable Meagan Alderton, Chair, and
Members of the Alexandria City School Board

TOPIC: Staff Response to BAC Report

ACPS 2025 STRATEGIC PLAN GOAL:

Goal 4: Strategic Resource Allocation

SY 2020-2021 FOCUS AREA:

N/A

FY 2021 BUDGET PRIORITY:

All

BACKGROUND:

The School Board, on January 19, 2021 tasked the Budget Advisory Committee (BAC) with:

- Providing an overview of the ACPS budget calendar process and the identification of any and all sequencing concerns with the City budget calendar;
- Identification and exploration of the most significant impediments to aligning the School Board and City budget calendars;
- Comparisons from other neighboring or comparable jurisdictions;
- consideration of potential adjustments that could be made to align the sequencing, with an exploration of the pros and cons of each adjustment; and
- exploration of the efficacy of other budget-related events (e.g., Community Budget Forum) (as time allows).

On May 20, 2021 the BAC submitted their annual report to the School Board which included a list of ten (10) recommendations for the School Board to consider. In response to the report and recommendations that came from it, here are staff's comments.

SUMMARY:

ACPS staff would like to thank the BAC for their efforts in providing recommendations to the

BOARD BRIEF

School Board for how to alter the Budget Calendar. We appreciate the opportunity and the inclusion of some of staff's comments and concerns in their report, and consideration in their recommendations. Their recommendations will be used by staff to create multiple options for the School Board to consider prior to the adoption date in September 2021. We believe these options will provide the School Board with a calendar that will continue to provide for a robust public budget process.

Our response is to provide a correction to a few points within the body of the report, provide additional information where we believe it's needed, and state where we can pursue the same end-goal of the recommendation from a different perspective. As is customary for financial reviews (Annual Operating Fund audit, School Activity Fund Audit, etc.) staff submits the following management response.

Report

1. The report states that ACPS's Budget Book is longer than surrounding jurisdictions' School Division and Municipality's books combined. Our surrounding school divisions' books, in some cases dwarf ACPS (450 pages).
 - a. FCPS (1000+)
 - b. APS (roughly 600)
 - c. PGCPs (500+ combined operating and CIP)
 - d. PWCS (500+)
 - e. MCPS (450+ combined operating and CIP)
 - f. FCCPS (300+)

In addition, ACPS participates in both the Association of School Business Officials (ASBO) and the Government Finance Officers' Association (GFOA) programs for excellence in financial documents. These programs define what should be included for an accurate and accessible budget that provides transparency for the public.

2. The report reviewed the budget approval (by school boards) and proposal (by City Manager or County Executive) sequencing of four (4) other jurisdictions. Our review of the data provided in the report shows there is not one clear preferred sequence. The report itself states that two (2) school boards approve prior to their jurisdictions proposal and one (1) with the same sequencing of ACPS. The fourth jurisdiction reviewed was not included (Newport News City), in which their school board approves and the manager recommends on the same day. Therefore out of the five (5) jurisdictions, two (2) sequence prior, two (2) sequence after, and one (1) same day. Therefore, of the five jurisdictions researched, Alexandria is currently one of the three that approves the budget on the same day or after.

Recommendations

1. Recommendation 3 states- "**ACPS should consider preparing a list of "reach" items beyond the Superintendent's Proposed Budget that could be pursued with additional funding.**" Within this recommendation it is stated, "While this ensures a narrowly tailored..." and mentions that a "reach" budget "may better reflect the true budget

BOARD BRIEF

needs ACPS has assessed in order to maintain the type of school system it believes is in the best interest of the community.”

We would like to ensure the School Board, and the community that when the Superintendent proposes a budget it does indeed reflect the true needs of the school division. Working with our City counterparts to understand the fiscal constraints of the body that provides 82% of our funding, does not mean proposing a budget that doesn't address our true needs. In fact, the process that the current financial team has implemented has helped grow ACPS's share of the City's General Fund by more than 2% over the past few budget cycles, to support our students. In addition, this collaboration has led to introducing “outside the box” funding strategies to secure textbook funding, technology infrastructure improvements for our facilities, and funding to grow our human capital to support our growing CIP. This removes these items from having to compete with other priorities in the Operating Budget.

If the School Board has a desire to increase the requested City Appropriation (for any reason), we have a process for doing so included in the “Budget Rules of Engagement” and “Budget Process Resolution”. If the desire is to have a list of items/programs that would be “wish-list” items, but not needed items, in the event additional funding is received this can be provided. Our recommendation to do this would be to provide it during the first work session. This will provide a framework for potential add/delete requests School Board members could propose, and seek additional funding for, or alter the Proposed Budget to include.

2. Recommendation 9 states- **“In consultation with the Board, ACPS budget staff should examine developing a streamlined and simplified version of the Budget book without losing the necessary information and analysis to make informed decisions.** The development of the budget book requires significant staff time. Further, at nearly 500 pages, the budget book is challenging for the public (and presumably Board members) to digest. Streamlining this document should have the additional benefit of freeing up budget staff to work on the development of the Combined Funds budget.

While we appreciate the desire to reduce the size of the Budget Book to free up staff time, our book includes the items needed to be recognized as an excellent budget document by both ASBO and GFOA. Our staff continues to seek ways to improve the efficiency of publishing the document, but want to maintain an accurate and accessible budget document that provides transparency to the public. To assist with the understanding of the budget, our team has implemented the “Bite, Snack, Meal” approach that was presented as an effective strategy as a part of the ACPS communications audit. Our “Where the Money Goes” document is the “bite”, “Budget in Brief” the “snack”, and our Budget Book is the “meal” for those individuals that want

BOARD BRIEF

a deep dive into the information. We will continue to refine how we present information as we stay on our journey of continuous improvement.

Again we want to thank the BAC for the time and effort spent in developing this report. Their recommendations will be used in developing our next Budget Calendar and for process improvement.

RECOMMENDATION: The Superintendent recommends that the School Board review this information.

IMPACT:

ATTACHMENTS:

CONTACT:

Dominic B. Turner

Dominic.Turner@acps.k12.va.us

APPENDIX 4: BAC MINUTES 2020-2021

**Budget Advisory Committee
June 22, 2021 at 7PM**

Location: Zoom

MINUTES

Budget Advisory Committee Members Present: Erin Dahlin (Chair); Nancy Drane (Secretary); Selena el Hajji; Sukumar Rao; and Ryan Reyna (new BAC member)

ACPS Staff Liaison Present: Robert Easley, Budget Director (arrived late)

School Board Liaison Present: Ramee Gentry, Board Member

Also in Attendance: Susan Neilson, Board Clerk

We were joined by the newest BAC member, Ryan Reyna. Chair Dahlin started the meeting with a round of introductions to introduce everyone to Ryan.

Approval of Prior Meeting Minutes – Approval of our May 2021 minutes was tabled. Minutes will be circulated via e-mail for approval.

Staff Report

- ACPS staff was not in attendance at the time of the staff report, so this agenda item was mostly tabled. Ms. Gentry will ask ACPS staff to provide a written report to BAC in lieu of attendance.
- Ms. Neilson mentioned that the Board will have its first work session on the budget on September 9, and will settle on a FY22 budget calendar at that time. The Board reviewed three options for the FY22 budget calendar at a recent School Board meeting. Those options were developed by ACPS staff, and directly influenced by the BAC memo that our committee produced. Two of the three calendar options explicitly had Board approval *before* the City Manager issues his budget, in response to BAC's memo and concerns raised by some Board members.

American Rescue Plan Resources

- The School Board will have a public hearing on August 3 regarding ARP resources. ACPS will provide a report at that time on proposed spending for ARP resources coming to ACPS.
- One BAC member inquired as to the deadline for ACPS to submit its ARP plan. Ms. Gentry believes it is in September.
- Ms. Gentry shared that ACPS may focus on one-time costs because ARP funds are relatively time-limited funds.

Follow-up on BAC Report and Subsequent ACPS Response

- This was intended to be an opportunity to debrief the memo that was submitted by BAC and the formal response from ACPS staff with ACPS, but ACPS staff was not present.
- Ms. Dahlin emphasized that the process of developing the memo was inclusive and collaborative, where ACPS staff had an opportunity to weigh in, suggest changes, etc. Because of that, the ACPS response was surprising and frustrating.
- Some of the ACPS response focused on things that were corrections and/or disagreements with language in the memo. It was disappointing to receive that in a formal memo, as opposed to through the process that pre-dated the issuance of the memo – especially knowing that ACPS staff had the opportunity to comment in advance.
- ACPS staff did acknowledge and thank us for our work, which we appreciate, but we would've liked concerns aired within the committee as opposed to via formal exchange of memos.
- Other BAC members similarly expressed the view that they saw this as a collaborative process, and have enjoyed the dialogue with Dominic and Robert throughout the process. There was some frustration at seeing a formal response from staff disagreeing/correcting some of the content of the memo when staff had ample opportunity to comment before it was submitted to the Board. It is not the substance of the comments that were concerning – it was the process. And it had the potential to undermine the committee and its work.
- BAC members felt that going forward, we should avoid this type of process issue. If there are areas of disagreement we cannot resolve, we can note those – but we should communicate on those before formal communication to the Board.
- Ms. Gentry shared similar concerns with the Superintendent and the CFO. Ms. Gentry's view is that if ACPS staff wanted a "wall" like you'd find in an audit where they withhold comment until after the report is issued, staff should express that from the beginning.
- Ms. Gentry wants to seek real clarity on what the staff's role will be going forward. Even if there is disagreement – there should be an opportunity to talk those through and if there is an inability to reach consensus, then to note the disagreement.
- Before the work session where the ACPS staff report was released, Ms. Gentry reached out to entire School Board to be sure that they were aware of the opportunity for ACPS staff to provide feedback prior to the issuance of BAC's report.
- As far as the Board is concerned, Ms. Gentry has received nothing but raves about the memo and that this is a model for what they want all School Board Advisory Committees to do.
- Chair Dahlin intends to send a formal response to Dr. Hutchings, Dominic, and Robert to share our experience and feedback on the process. The goal of the response is to also emphasize ensuring two-way communication going forward (e.g., sharing information, etc.)
- The good news is that there is an Ad Hoc Committee working on better defining the role of School Board Advisory Committees. Ms. Gentry will be passing along some feedback to Dr. Rief, who is Chairing the Ad Hoc Committee.

- On substance – BAC noted that while the calendar issues were an initial focus of the memo, there are numerous recommendations regarding communications and public engagement. How is ACPS is going to move those forward?
- ACPS staff discussed how BAC can help with implementing elements of the BAC memo, which is great. We need guidance from staff, however, and a fuller complement of members to take on a more active role.
- Ms. Gentry shared that the Communications staff reorganization has just concluded, meaning this is a good time to move forward with these budget engagement issues. We can express this in a proposed Scope of Work for 2021-2022.

Leadership of BAC Going Forward

- Chair Dahlin shared that her BAC term is expiring, and she will be transitioning off the committee. She would like to propose transitioning leadership to BAC Secretary Nancy Drane. There was a motion to elect Nancy Drane as Chair that was seconded and voted on unanimously.
- BAC Secretary position remains to be filled.
- We need a strategy to build membership, and need School Board help in recruiting members.
- With the City equivalent, BFAAC, each Council member is responsible for recruiting and securing a member. Could School Board take a similar approach?

Next Steps

- Ms. Nielsen suggested that BAC do a very brief End of Year Memo that would summarize its 2020-2021 activities.

Adjournment

- With that, the meeting was adjourned at 8:08 p.m.

**Alexandria School Board
Budget Advisory Committee**

May 18, 2021 - 7PM

Location: Zoom

MINUTES

Budget Advisory Committee Members Present: Erin Dahlin (Chair); Nancy Drane (Secretary); Selena El Hajji; and Sukumar Rao.

ACPS Staff Liaison Present: Robert Easley, ACPS Director of Budget and Fiscal Compliance

Alexandria School Board Liaison Present: Alexandria School Board member Ramee Gentry; Susan Neilson, Clerk, Alexandria City Public Schools School Board

Meeting was called to order at 7:04 p.m.

Sean McEneaney has resigned his position on BAC, effective immediately. He wanted to express his gratitude for the experience of participating in BAC. Chair Dahlin expressed her appreciation for his work and contributions.

Approval of Prior Meeting Minutes

A motion to approve the minutes was made and seconded, with all present approving adoption of these minutes.

Staff Report

- Budget Work Session on May 20 will include:
 - BAC Report and Presentation
 - Funding update (will review Federal funding opportunities)
 - New item – City Council added \$400K to ACPS budget to fund the early college program, partnering with Alexandria City High School. This was a bit of a surprise. Apparently there was some funding available in the City’s CIP budget that had some relationship to NOVA that wasn’t needed, so they determined they’d turn those over to ACPS.
 - BAC members did raise a process question. Did ACPS request these funds? Are there concerns about this being Council mandate to ACPS re: programming through the provision of the budget?
- Add/Deletes – there are 3 items that were submitted by Board members
 - Add – Technology audit
 - Add – ½ time Admin Support for CTE program

- Delete – MAP testing funding
- SRO funds – ACPS must develop a plan by July 6 of how they'd use those funds for mental health-related funding.

American Rescue Plan Resources

- Ms. Dahlin had a conversation with Kathy Stenzel, who is the Board's representative to BFAAC. BFAAC is providing some recommendations to the City Council re: use of the City's American Rescue Plan funds. BFAAC is recommending that the City Council work closely with the School Board re: identifying expenditures that would benefit from this funding and in particular, shared use spaces that City funding could be utilized, but with a dual purpose to serve the schools.
- Important to recognize that this is "once in a generation" funding to benefit our schools.
- Education-specific ARP funds have not yet been designated by ACPS. ACPS has a deadline of September 1 to apply for these funds through the State of Virginia. ACPS is putting a team together to do a "deeper dive" on the potential use of the funds.

Discussion about final Memo and Presentation for School Board

- Thanks to BAC members who contributed to the development of the memo.
- Ramee plans to send a message to the Board tomorrow to preview the BAC presentation. She will let Board members know that the focus of the discussion will be on the recommendations portion of the memo.
- Important to remind the Board that we've asked ACPS budget staff to develop several calendar options for its review, incorporating our recommendations. Those will go to the Board in the June time frame. The Board will thus have another opportunity to have a more detailed discussion of the pros and cons on various budget timing choices. Tonight – we're focusing a bit higher level on our general recommendations, observations, and themes that emerged.
- We should plan on a high level overview – run through the recommendations. We can group the recommendations in three sections and have brief slides for each to frame the discussion:
 - Introduction – Goals and Our Process (Erin)
 - School Board and City Council Engagement and Timing (Selena)
 - Budget decision alignment; ongoing engagement; "reach" budget
 - Public Engagement on ACPS Budget (Nancy)
 - Public engagement; Community Budget Forum; website/communications/fact sheets; etc.
 - Internal ACPS Budget Process (Sukumar)
 - Budget book development; propose several budget calendars; efficiencies that could be gained through budget revisions (less

add/deletes, more substantive presentations at budget release sessions, etc.)

- Q&A (We will tag team)
- We should plan on starting at 7:00 p.m., but it could be later than that. We should email Ramee our cell phone number so she can reach out for timing updates.
- Susan will send us Zoom invitation for the meeting.

Other Business

None

With that the meeting was adjourned at 8:12 p.m.

**Alexandria School Board
Budget Advisory Committee**

**April 20, 2021 - 7PM
Location: Zoom**

MINUTES

Budget Advisory Committee Members Present: Erin Dahlin (Chair); Nancy Drane (Secretary); Salena El Hajji; and Sukumar Rao. Sean McEneaney was unable to attend the meeting.

ACPS Staff Liaison Present: Robert Easley, ACPS Director of Budget and Fiscal Compliance

Alexandria School Board Liaison Present: Susan Neilson, Clerk, Alexandria City Public Schools School Board. Alexandria School Board member Ramee Gentry was unable to attend the meeting.

Meeting was called to order at 7:04 p.m.

Approval of Prior Meeting Minutes

A motion to approve the minutes was made and seconded, with all present approving adoption of these minutes.

Staff Report

With respect to Federal funding, a reminder that ACPS already received CARES Act (ESSER 1) funding (\$3.7M). A previously submitted Board brief¹ covered these expenditures. The ACPS budget team recently submitted its application for ESSER 2 funding (\$15.5M) and is in the process of preparing an application for the ESSER 3 funding (a/k/a American Rescue Plan) (\$34.8M). Generally, ACPS will be focused on doing more of what they did with the first rounds of funds (e.g., technology, SEAL supports, PPE, infrastructure improvements). But they also anticipate making some additional adjustments to account for other potential expenditures, as there is a limit to the utility of some of the prior expenses (i.e., you can only purchase so many computers). There was a question about what “infrastructure” means. They are working on identifying other non-technology infrastructure needs and formulating how they’d be paid for. Funds could be used to pursue physical space for additional, temporary capacity if needed (e.g., learning cottages or leasing building space). They may also have some FY21 savings that can be utilized to purchase air purifiers for buildings. These may not require Federal funds, but it frees up those Federal funds for other uses.

¹ https://alexandriapublic.ic-board.com/public_itemview.aspx?ItemId=14432&mtgId=1777

There was a question about how the total \$50M (from ESSER 2 and 3) will be utilized, knowing that the funds will likely far exceed what they need for the items listed above. Can these funds be used as an opportunity to accelerate investments in infrastructure improvements, deferred maintenance, etc. – especially around HVAC? How much of those details need to be in the applications they filed or are planning to file? ACPS is still working on planning out how to use the funds through an iterative process. The applications are due with a very short turnaround time, but they have two years to spend the funds and an opportunity to amend their original applications to account for additional/more specific expenditures. So, this is still a work in progress.

For FY22 budget planning, they are formulating the budget based on an expectation of a 5 day a week, in-person learning environment. However, they will maintain the ability to pivot if necessary (especially if they need to maintain 3 feet social distance). However, that's when learning cottages or other physical space comes in. They hope to have parent return-to-school surveys in hand as they are doing this budgeting to account for the students who intend to return physically to the classroom, which will then let them know what level of virtual supports will continue to be needed.

ACPS budget staff anticipate some forthcoming adjustments to the Superintendent's proposed budget. These will be shared with the Board on May 6. These changes reflect additional state revenue (about \$2M) to support compensation increases. The City is set to adopt their budget in early May, and will reflect those changes. The adjusted budget changes only include revenue coming from outside of the City appropriation (e.g., State).

Finally, with respect to FY21 budget – they are starting the year-end closing process now that they are moving in Q4. It was a “healthy” year with respect to budget v. actuals because of unintended budget savings arising out of the remote learning environment. These savings were “significant” from a budget perspective. As a result, ACPS does not intend to dip into its fund balance, and may actually add to the fund balance. And – as described above – some of these savings may be reprogrammed for air purifiers.

Discussion of Proposed Budget Process Memo

We will be presenting our budget memo and recommendations at an upcoming May Board meeting – the May 20 Budget Work Session. The goal of the meeting tonight will be to go through the draft memo and share reactions and potential edits. The memo will have to be submitted to the Board in early May, well in advance of the Board meeting at which we will present.

These comments supplement those made directly into the draft memo document:

- There could be some opportunities for streamlining during the priority setting/rules of engagement process in August/September/October – although the ACPS budget team's sense is that this is “time well spent” since the work done here settling on priorities is

important background for the rest of the budget process and the work done here reduces time needed in future stages of the process. It may seem prolonged, but there is considerable time spent going through potential priorities (there could be numerous ones identified) and then settling on a tight set of agreed upon budget priorities.

- The budget calendar document itself could be presented differently. The level of detail lends to completeness, but may make the process appear more complicated than it is. Even consolidating events that happen on the same date to one single item might be an improvement.
- The Community Budget Forum may be a missed opportunity. It is intended to be an educational opportunity members to explain the budget process. However, it is not traditionally well attended by the community. Could it be reformed, replaced with other more targeted engagement opportunities, etc.?
- The time that the ACPS budget team takes to confer with ACPS staff is important; it avoids a situation where the budget is rushed and there is a feeling that the ACPS budget team has created it in isolation, without broader ACPS staff input.

Next Steps

- Erin will follow up with Ramee Gentry to get her feedback since she was unable to attend the meeting tonight
- BAC will aim to complete its budget memo by early May for circulation to the Board
 - BAC committee members are asked to make all comments/edits to the draft budget memo by Tuesday, April 27
 - Nancy will then review and make final edits to synthesize comments, etc.
- BAC will provide recommendations to the School Board on May 20. The presentation (about 10 minutes in length plus 5+ minutes for Q&A) will cover:
 - BAC goals for this process
 - High level observations from comparative review of other jurisdictions
 - *Consider whether this could be incorporated into the BAC Recommendations piece (i.e., our suggestion for a Board vote b/f the City Manager budget release is in line with the other jurisdictions reviewed)*
 - BAC recommendations
 - Next steps
- Erin will prepare a document with draft talking points for the presentation and a draft set of slides (the context will be lifted from the final budget memo)
- We will identify a date for BAC members to connect and prep for the Board meeting presentation

With that the meeting was adjourned at 8:36 p.m.

**Alexandria School Board
Budget Advisory Committee**

**March 16, 2021 - 7PM
Location: Zoom**

MINUTES

Budget Advisory Committee Members Present: Erin Dahlin (Chair); Nancy Drane (Secretary); Sean McEneaney, Sukumar Rao

ACPS Staff Liaison Present: Robert Easley, ACPS Director of Budget and Fiscal Compliance

Alexandria School Board Liaison Present: Ramee Gentry, Alexandria School Board; Susan Neilson, Clerk, Alexandria City Public Schools School Board

Public Participant: Selena El Hajji (potential BAC member)

Meeting was called to order at 7:04 p.m.

Approval of Prior Meeting Minutes – Motion to approve the minutes was made and seconded, with all present approving adoption of these minutes.

Ms. Dahlin oriented attendees for our agenda tonight (after staff report) – to discuss our comparison of budget calendar as between Alexandria and a few other jurisdictions.

Staff Report

There is not much to report as far as a budget update. The budget is now with the City and going through its normal process. They are working on some reallocations among ACPS individual schools based on revised enrollment numbers.

As far as forthcoming American Rescue Plan (ARP) funds, ACPS hopes that the State will provide guidance and information to them by the end of the week on amounts and allowable usage. ACPS expects receiving about \$30M, with 2 years to spend it. (This is significant, since prior allocations had shorter time lines. ACPS is also anticipating a second round of CARES ACT/Elementary and Secondary School Emergency Relief Fund (ESSER) funding of about \$15M. Application for those funds is due on April 1. Broadly speaking, ESSER funds are focused on infrastructure (including technology infrastructure). The State doesn't want to see more laptops, but instead wants to see HVAC, ventilation, facility type upgrades; bottle fillers (to avoid contact bubblers); technology infrastructure in the classroom; etc. The American Rescue

Plan is much broader. It is still a little early to know where they'll focus with ARP funds. It could be staff hires for temporary staff (since these are one-time funds); facility upgrades/modification (e.g., spacing, air filtration systems); learning loss services; etc.

Staff was asked whether there are glaring holes in the proposed FY22 budget that these funds might address? Biggest gain could be in the ability to expand capacity (e.g., add facilities or buildings they can utilize for expanded capacity). They've engaged with owners/operators of Victory Center on Eisenhower to discuss potential use of that space. There have also been several meetings between the City Manager, Council, and School Board about potential use of city-owned space. Absent the ESSER and ARP funding, it would be challenging to pursue those options.

Staff was also asked whether there has been any "after action" analysis of how stimulus and emergency funds have been used thus far (e.g., usability of packets, other materials sent home, etc.) Not as of yet.

Discussion of Other Jurisdictions Budget Process

BAC members then turned to a discussion of research conducted about the budget process in other jurisdictions. Each BAC member summarized the information contained in the Google docs chart and made some additional comments:

Fairfax County

- Similar timeline but School Board approves its budget before the County Executive issues proposed budget to the Board of Supervisors
- Alexandria has more work sessions and public hearings than Fairfax County
- CIP seems to be a completely separate process

Arlington County

- School Board proposes budget before the budget is presented to Arlington County Board, but the School Board approves the budget after the final budget is proposed by the Arlington County Board
- Arlington has less work sessions and public hearings – and has less combined work sessions

City of Richmond

- There are 6 levels of engagement between school and city
- School Board approves budget w/in about one month and then it goes to the Mayor, so appears to be a more truncated process than Alexandria

- For public engagement, there is one hearing at school board level – but other opportunities for public engagement through the city budget process
- The “budget book” appears to be about ½ the size of Alexandria’s materials

City of Newport News

- Seems like the School Board and City processes are well aligned
- Public information is sparse, but appears that there are two joint meetings with respect to the budget and 1-2 public hearings; no obvious add/delete process

After the reports out, BAC members engaged in further discussion and covered the following points:

- Key questions presented:
 - Is there a way for the School Board, as a governing body, to pursue a more streamlined, efficient budget process in Alexandria?
 - Note that while the impetus for this examination may have been desire to re-align timeline for School Board’s budget approval vis-à-vis the release of the City Manager’s budget, we took this as opportunity to look at the budget process more broadly
 - Alignment is one thing, but it is also about efficiency and “working smarter, not harder.” A simpler process leads to better engagement.
 - Are there costs and benefits to pursuing a more streamlined, efficient budget process and if yes, what are they?
 - Are there lessons from other jurisdictions that we can learn from?
- Observations:
 - Alexandria does appear to be an outlier in having the School Board’s initial vote to approve its budget come after the budget release of the City/County executive
 - We appear to have *more* work sessions and public engagement opportunities than other jurisdictions; a look at our calendar makes it appear quite complex compared with other jurisdictions.
 - Query: are the public engagement opportunities we have meaningful?
 - Note: there is a requirement to have 1 public hearing for CIP and 1 public hearing for Combined Funds.
- Potential recommendations – there are opportunities for BAC to recommend a more efficient public engagement process, such as:
 - More targeted public engagement opportunities
 - School Board could have less formal public budget hearings throughout its budget calendar, but increase the methods it uses to engage the community on budget issues (“work smarter, not harder”)
 - Use online tools like survey/comment page on Division’s budget page (e.g., Fairfax County and Newport News)

- Engage w/ FACE Center or PTAs on pushing out budget information and/or getting budget feedback
- A lot of people have taken advantage of submitting written comments (in addition to live testimony) during COVID
- Equity demands engagement opportunities other than a formal public hearing
- Pair more targeted public engagement opportunities with more robust public information (e.g., more interactive and educational materials on ACPS budget web page)
- Potential to use BAC to solicit public feedback on the budget and then submit to the School Board

Next Steps

- BAC will provide recommendations or present options to the School Board in May. ACPS staff will consider these and come to the School Board in June with several options to consider, building on information we've shared in our memorandum and reference materials.
- BAC April Meeting (April 20) – we will review a draft outline/template together, including ideas about other engagement opportunities.
- Goal would be to finalize memo by May, with final review at our May meeting (May 18)
- We will present our findings to the School Board in May – Ramee and Susan will discuss getting it on the School Board agenda (possibly May 20 or June 3)

With that the meeting was adjourned at 8:35 p.m.

**Alexandria School Board
Budget Advisory Committee**

**February 23, 2021 - 7PM
Location: Zoom**

MINUTES

Budget Advisory Committee Members Present: Erin Dahlin (Chair); Nancy Drane (Secretary); Sean McEneaney, Sukumar Rao

ACPS Staff Liaison Present: Robert Easley, ACPS Director of Budget and Fiscal Compliance

Alexandria School Board Liaison Present: Ramee Gentry, Alexandria School Board; Susan Neilson, Clerk, Alexandria City Public Schools School Board

The meeting was called to order at 7:05 p.m.

Welcome, Public Comment, and Preliminaries - The meeting began with a welcome from Chair Dahlin.

There were no public participants, and thus no public comment period was needed.

The committee tabled consideration of the January meeting minutes to the March meeting.

Ms. Drane inquired about the BAC End of Year Report (2019-2020) and BAC Scope of Work (2020-2021). Those were recirculated to Mr. Easley to then be reviewed by Superintendent Hutchings and then presented to the School Board under the consent calendar.

ACPS Staff Report - Mr. Easley provided a staff report to all present.

The School Board approved the Superintendent's proposed Combined Funds budget last week. There were a few adjustments that were made after the Superintendent first presented the proposed budget to the board. \$2.1M of additional revenue from the State of Virginia was incorporated into the budget. Equivalent expenses included staffing (a senior buyer position) and compensation increases (1% increase to eligible employees to offset increased employee benefit expenses and about \$200,000 in order to raise base compensation for positions that were deemed to be "below market" in a recent compensation study). There will be a joint budget work session between the City Council and School Board on Wednesday, March 3.

There has been some activity at the State level with respect to teacher salaries. There are competing proposals in the House and Senate to incentivize increases in teacher compensation,

5% or 3%, respectively. The idea is that the state would match the additional cost if a local jurisdiction committed to the salary increase – although that match would be only a portion of the funds needed to realize the full increase (with the balance having to be raised by the local jurisdiction). In the case of ACPS, they'd need to either reprogram funds to be made available, or ask the City to provide additional funding. This is still being negotiated at the state level, so there is not yet sufficient clarity on the financial implications – but more to come.

ACPS is also considering other potential Federal funding opportunities. Additional CARES Act funding could translate to an additional \$15M, with additional funding opportunities through the proposed American Recovery Act. Once confirmed, ACPS might be able to reprogram expenses currently in the combined funds budget to be offset by these Federal funds, opening up additional funding for other priorities. There are lots of moving parts that will have to be worked out. Generally, these Federal funds can support a broad range of expenses including supporting the unique needs of low-income, ELL, racial minorities, foster youth; emergency preparedness and response; sanitation training and supplies; technology; mental health supports; programs to address learning loss; facilities repairs and improvements; and increased social/emotional learning. ACPS has not yet made priorities as to how these funds might be expended, but will try to target one-time, surge type expenses since these will be one-time funds. Some examples include the classroom monitors being hired during hybrid learning and additional support to help with the feasibility of offering SEAL Mondays during hybrid learning.

Finally, Mr. Easley was asked whether the fund balance has been utilized during this time, and he confirmed that there has been no need to do that.

BAC Activities - The committee then turned to a discussion of executing our Scope of Work for academic year 2020-2021. Chair Dahlin reviewed next steps for our work. We identified six potential jurisdictions (below) that we might explore further:

City of Falls Church
City of Fairfax
City of Richmond
City of Fredericksburg
Arlington County
Fairfax County

There was some discussion about which made the most sense to pursue, with the additional jurisdictions of City of Newport News and City of Hampton Roads being suggested. In the end, we decided on 4 jurisdictions, with the following BAC members taking on the responsibility for initial research.

City of Richmond – Erin Dahlin
City of Newport News – Sean McEneaney
Arlington County – Sukumar Rao

Fairfax County – Nancy Drane

BAC members are being asked to at the very least, collect and explore the budget calendar(s) for their assigned jurisdiction and upload information into BAC's shared Google Drive no later than March 8. (BAC members may find it feasible to explore other issues, as outlined below.)

We will explore having a shared document that might allow for a presentation/comparison of each jurisdiction against Alexandria's budget calendar.

The collected materials will then be reviewed by BAC members during the March 16 meeting.

After reviewing this data at the March 16 meeting, we will develop a plan for further research and/or interviews. Mr. Easley may be able to assist with any needed requests for information.

The goals here are two-fold: (a) comparison of the sequencing of budget decision-making by School Board and City/County; and (b) efficiencies that other jurisdictions may have employed in the budget calendar in order to streamline the process (e.g., limited number of public engagement sessions; less add/delete sessions; etc.)

Topics that we might potentially want to explore in each jurisdiction include:

1. Budget Calendar(s): (a) School Board and (b) City/County
 - a. *Key dates*: release of proposed budget by Superintendent to School Board; School Board vote on proposed budget; release of City/County proposed budget by City Manager or equivalent; City/County vote on final budget
2. School Board composition/structure (including whether there is a BAC equivalent)
3. Formal interplay between School Board and City/County around budget setting (e.g., joint budget work sessions, meetings, etc.)
4. Level of public engagement during School Board budget process (e.g., community budget forum, # of public hearings, etc.)
5. Consideration of potential streamlining of some of the more time-consuming aspects of the budget process (e.g., development of budget book)
6. Rules of engagement for budget process (e.g., # of add/deletes, etc.)
7. Whether, how and when budget priority setting is made and how it is incorporated into budget planning and decision making.

To the extent we cannot glean this from publicly available information, Robert may be able to facilitate conversation with his counterparts in other jurisdictions. We could, for example, compile a memorandum with a list of questions or requests we'd like to pursue that he could pass along.

A rough timeline for our work is as follows:

March 8 – BAC members complete initial review of other jurisdictions

March 16 – BAC meets to review preliminary information

March-April – BAC members do additional research based on questions above or other issues raised during the March BAC meeting

April 13 – BAC members post additional information for review

April 20 (To be confirmed) – BAC meets to discuss additional information and brainstorm possible recommendations

April-May – BAC prepares memorandum to School Board

May 18 – BAC reviews and approves memorandum for submission to the School Board

June 3 – Memorandum placed on School Board Meeting agenda; BAC is available for questions

The meeting adjourned at 8:10 p.m.

**Alexandria School Board
Budget Advisory Committee**

**January 19, 2021 - 7PM
Location: Zoom**

MINUTES

Budget Advisory Committee Members Present: Erin Dahlin (Chair); Nancy Drane (Secretary); Sukumar Rao

ACPS Staff Liaison Present: Dominic Turner, ACPS Director of Financial Services; Robert Easley, ACPS Director of Budget and Financial Systems

Alexandria School Board Liaison Present: Ramee Gentry, Alexandria School Board; Susan Neilson, Alexandria City Public Schools School Board Clerk

The meeting was called to order at 7:06 p.m.

Welcome, Public Comment, and Preliminaries - The meeting began with a welcome from Chair Dahlin.

There were no public participants, and thus no public comment period was needed.

Mr. Rao moved to approve the December 2020 minutes as drafted by Secretary Drane. The motion was seconded by Ms. Dahlin. **VOTE:** All members present voted unanimously to approve the minutes.

ACPS Staff Report - Mr. Turner and Mr. Easley provided a staff report to all present.

The primary issue is that the School Board wishes to approve its budget in advance of the City Manager's issuance of his proposed budget. BAC is not coming to this with a point of view; rather, we've been charged with providing a comprehensive exploration of this issue for School Board review with the reasons why the calendar is the way it is.

Mr. Turner shared that some members want to move it ahead of the City Manager's proposal, but his view that the committee also look at moving *back* the approval date to allow for more time to deliberate. The time between the proposal and the approval is pretty compressed as it is. To be true to this process, he'd like to the pros and the cons to both moving it earlier or moving it later.

Mr. Turner reviewed the budget process. His staff starts the budget process in July. Not too much downtime in the budget office. (Really March and April are the only “down” time throughout the year.) During the month of August, they meet with school board members in 2x2 meetings to give a budget 101. There is a September meeting with school board to set budget priorities and rules of engagement. Thereafter, they begin to meet with ACPS principals and staff to work on requests to be received in October. Superintendent finalizes proposal and work on the book and the presentation in order to then present in January.

What would be the downside of shortening this timeline to align the decision-making as described above? If we shortened the budget time period, we might risk not having time for enough staff engagement.

We inquired whether there are other key data items that staff might need that come externally that they don't have as much control of. Enrollment projections are usually received the first or second week of November. (This year, received during last week of November/first week of December.) They do as much of the budget as they can without the projections, but need those to finalize the budget. The actual enrollment (ADM – average daily membership - 98% of enrollment) guides state funding. Get those in middle of October even though they are supposed to get them in late September. \$50M of total budget is state funds. City puts out their budget guidance at the end of October/beginning of November. They get info at City Council retreat – first Saturday in November. Need that information to formulate 75% of the budget. Health insurance costs – depends on revenue or increase. Summer – health benefits committee convenes to see if HR recommends any changes to plug into the budget. Work with a third party consultant in the Spring to refine projections w/r/t health benefits to project what will happen the following year. Benefits are based on actual claims – ACPS pays those actual claims – and dictates the premiums.

Mr. Easley – School Board policy DB – it references that the calendar and directs that the process shall include at least one work session to review budget and at least one public hearing. (To extent that we have multiple of each, we could reduce.) Add/deletes – take up several meeting dates, if we are looking to truncate. Sometimes the second add/delete is not necessary. Based on Code of Virginia, governing body (City) must approve educational budget by May 15.

Moving up the Superintendent's proposed budget it almost impossible. As it is, finance is the only office that works over the winter break to get it done by the early January date. Another factor is the sheer volume of the budget book/materials. Many people don't understand the time to produce 500 page book, every year; they don't even have time sometimes to catch typos. If they were to move it up to the last school board in December – taking almost a month of time – they'd only have 3-4 weeks from when they get projections to put together 75% of the budget and publish a 500 page document. Thanksgiving also happens during that time period. Mr. Easley also added that they might put themselves in a situation where they're not doing their due diligence, unable to offer complete justification for the budget year, and may

lose time to get additional input from stakeholders and do a true analysis. In sum, the quality of the budget might be compromised by pushing it back into December.

How do you reconcile the idea that there is little flexibility in the budget (because so much of it is compensation)? Could you move the parts that ARE flexible up in the calendar? If they were just data or formula driven, then could do this more quickly – but they try to move beyond nuances w/r/t staffing and individual school needs.

Public hearings are hard to place – if you do after add/deletes, doesn't give public much time to react. Wanted to do 2 this year, at least one before add/deletes. Public hearings are maybe not needed at all b/c there is ability to have public comment outside budget timeline. Don't get a lot of feedback at public hearings. (Perhaps one, well-timed public hearing would suffice.)

When does the Schools-City coordination begin? Superintendent meets with Mark Jinks bi-weekly. Dominic meets with Deputy City Manager (Laura Trigg) for periodic chats. Morgan Rolph (Dir of OMB) has meetings with them whenever needed. During October, there is an uptick in the conversation. City Council Retreat is in early October. They use ACPS fiscal forecast to inform their fiscal forecast (September) since ACPS is such a big part of City budget.

What is relationship with CIP. Not as much dramatic movement. Would it be better to have the CIP done earlier (usually done last meeting in December). Would that free up time for the operating budget? Yes – could free up some time. That could be a recommendation from BAC.

Are any other recommendations you'd make? They'd recommend looking at what things could be taken out of the schedule after the budget is presented in January that would allow for the approval date to move up earlier. In their view, it would be too hard to move Superintendent's proposal before the New Year. And on the other end, the Board approval would have to move up significantly to be meaningful. (In other words, if we move up the Board approval a day before City Manager – not meaningful; won't change anything.) ACPS represents 1/3 of the City's budget. City's proposed budget is done before the Superintendent proposes his budget. They're not likely to change anything unless significant lead time. For example, if Board asks for \$10M more than what they're working with, they're not going to make that change. That's too much \$\$\$. They'd need to approve that kind of increase/estimate in November. Once Superintendent presents budget, they have the opportunities to reallocate or identify revenue, however.

Other jurisdictions to look at for comparison? City of Richmond. Little bit larger, but a city vs. a county. (Counties work differently.) City of Falls Church (same reason). Is there enough of a difference in county that there is no value to consider? They recommend looking at them, but just recognize there is a difference. Counties can actually issue debt whereas city cannot. That is the biggest difference.

BAC Activities - The committee then turned to a discussion of the proposed End of Year Report and Scope of Work for academic year 2020-2021, as drafted and circulated by Ms. Drane. Chair Dahlin asked BAC members to share any comments or feedback on End of Year Report and Scope of Work by Thursday COB so Nancy can pass along to Susan for School Board review.

The meeting adjourned at 8:20 p.m.

**Alexandria School Board
Budget Advisory Committee**

**December 15, 2020 - 7PM
Location: Zoom**

MINUTES

Budget Advisory Committee Members Present: Erin Dahlin (Chair); Nancy Drane (Secretary); Sean McEneaney; Sukumar Rao

ACPS Staff Liaison Present: Robert Easley, ACPS Director of Budget and Financial Systems

Alexandria School Board Liaison Present: Ramee Gentry, Alexandria School Board; Susan Neilson, Alexandria City Public Schools School Board Clerk

The meeting was called to order at 7:01 p.m.

Welcome, Public Comment, and Preliminaries - The meeting began with a welcome from Chair Dahlin after the committee's COVID-related hiatus. (The committee's last meeting was in March 2020.)

There were no public participants, and thus no public comment period was needed.

Mr. McEneaney moved to approve the January 2020, February 2020, and March 2020 minutes as drafted by Secretary Drane. The motion was seconded by Mr. Rao. **VOTE:** All members present voted unanimously to approve the minutes.

ACPS Staff Report - Mr. Easley then provided a staff report to all present.

With respect to the fiscal year 2021 budget, ACPS is seeing some savings, specifically with building related costs (e.g., utilities) and extra staffing costs (e.g., substitute teacher). ACPS has benefitted greatly from CARES Act funding and State of Virginia pandemic-related funding. ACPS received \$3.7M in CARES Act funding and another \$2.8M in State of Virginia Coronavirus funds. ACPS front-loaded use of the Virginia state funding since it had to be expended by December 31, 2020. The funds were used for PPE, learning kits, etc. The vast majority of total CARES Act funding remains available, with a 2022 deadline for expending. This will be utilized as ACPS continues virtual learning and plans for reopening. Approximately \$450,000 of Alexandria CARES Act funding was allocated to non-public schools, per Federal mandate. ACPS worked closely with these non-public schools to identify eligible needs and to facilitate the reimbursement process.

As for fiscal year 2022, ACPS staff is in the midst of budget planning. ACPS staff are holding two-by-two meetings with School Board members to discuss budget strategy. The fiscal year 2022 budget theme is resiliency: *recover*, *retain*, and *reignite*. Funding priorities include areas to help students and staff *recover* from learning losses; strategies to *retain* staff (e.g., compensation enhancement); and ways to *reignite* learning and passion among students and staff.

In terms of timing, on Thursday, December 17, the School Board will adopt the 2022-2031 Capital Improvement Program (CIP). Goal of this particular CIP was to refocus on projects that can be accomplished now, including those projects with an unique window of opportunity because of pandemic-related school building closures. Other key fiscal year 2022 dates include:

- January 7 – presentation of Superintendent’s general operating budget to the School Board (School Board’s first glance at the comprehensive budget);
- January 14 – first School Board budget work session on combined funds budget; and
- January 21 – first public hearing on combined funds budget.

Committee members inquired of Director Easley about communications efforts around the public hearing. Director Easley reported that his team has met with the ACPS Communications team to talk about the roll out of Superintendent’s combined funds budget (“we want it to tell a story”) and a better way of communicating to the public about the contents of the budget. The strategies they discussed include an enhanced and dynamic website with information about the budget. Finally, Director Easley reiterated that he is happy to answer budget-related questions anytime. Committee members should feel free to reach out to him via e-mail.

BAC Activities - The committee then turned to a discussion of the proposed Scope of Work for academic year 2020-2021.

Chair Dahlin reminded committee members that a considerable amount of work was done before March 2020 to chart a path for the committee’s work. One clear issue that arose during the interviews with School Board members and, recently, in the development of the FY22 budget calendar, is the sequencing of decision-making by the Superintendent, School Board, and the City Manager. Several School Board members want to realign the sequencing of School Board and City decision-making regarding the ACPS budget. The specific point that has caused the most friction is the point where the School Board is poised to vote to approve the Superintendent’s proposed budget. What has historically happened is that the Superintendent shares his proposed budget with the City prior to School Board approval. The Superintendent’s proposed budget is considered by the City and incorporated into the City Manager’s proposed budget when released – all before the School Board officially votes on the Superintendent’s proposed budget (sometimes by just a few days). As a result, the School Board’s vote approving the Superintendent’s proposed budget can seem irrelevant. Some School Board members find the optics of the City Manager saying that he’s “met ACPS’ request 100%” upon release of his proposed budget problematic when the School Board has not actually approved the budget. Some Board Members find this particularly concerning when one of the primary roles and functions of the School Board is to approve the budget.

The School Board would like to task BAC with looking at the ACPS budget calendar with this and other concerns in mind, with the goal of developing a set of recommendations for addressing them. Ms. Gentry noted that over the years there have been adjustments to improve the sequencing of the calendar, but this one issue remains. She believes that this is the one point that has garnered the most focus, but that there could be other things we will discover about the sequencing writ large. BAC's effort will include an analysis of surrounding and/or comparable jurisdictions.

BAC is being asked to do the following:

- Provide an overview of the ACPS budget calendar process and identify any and all sequencing concerns.
- Identify and explore the most significant impediments to aligning the School Board and City budget development and decision points.
- Provide comparisons from other neighboring or comparable jurisdictions.
- Outline and/or propose potential adjustments that could be made to align the sequencing, with an exploration of the pros and cons of each adjustment.
- Explore the efficacy of other budget-related events (e.g., Community Budget Forum).

In order to advance this Scope of Work, BAC members will endeavor to study other jurisdictions. Recognizing that there is additional coordination that happens outside of the published calendar, BAC members will set up a time to talk to Dominic Turner and his counterpoint in the City.

Some brief discussion ensued. Ms. Gentry noted her impression that ACPS is usually the first of other neighboring jurisdictions in terms of budget release timing. Why is that? What are the real impediments to either moving ACPS decision-making up or giving ACPS more time to deliberate? A few things that have been raised: (a) enrollment numbers are "late" and push against budget development; and (b) City cannot push their timeline back because of external pressures they're under re: timing. These issues need to be explored. Another alternative Ms. Gentry hopes BAC can explore is, if the calendar sequencing cannot be resolved, whether there are communications-type strategies that can be implemented to clarify the role between the City and the School Board regarding budget approval. One BAC member asked how significant an issue this is for the School Board. Ms. Gentry shared that this has always been a problem for certain School Board members; that leaves a perception that the City Manager is telling the School Board what its budget should be instead of the School Board having that autonomy. Practically speaking, there may not have been significant problems with alignment between the Superintendent, School Board, and City Manager in recent years – but the process should accommodate either circumstance.

As far as jurisdictions to explore, the Dillon Rule sets Virginia apart from other jurisdictions, so looking at Virginia probably makes most sense. Ms. Gentry suggested City of Falls Church, Arlington County, Fairfax County or City of Fairfax, City of Fredericksburg, City of Richmond.

In terms of timing, the goal is to have a memo available to the School Board by May 2021 with recommendations for its consideration. This timing will allow the School Board time to deliberate before budget calendar(s) are proposed by ACPS in June 2021.

BAC Next Steps – The committee then discussed next steps for BAC activities.

Secretary Drane will draft a proposed 2019-2020 End of Year Report (outstanding because of the committee's abrupt interruption of activities) and a 2020-2021 Scope of Work for the committee's consideration. BAC will also need to develop a work plan for its 2020-2021 Scope of Work, with a list of questions for consideration, jurisdictions to be explored (with assignments to BAC members), and internal ACPS interviews (e.g., Mr. Turner, City staff). Ms. Dahlin will take a first stab at a list of questions and will invite Mr. Turner to the next BAC meeting. She will also ask Mr. Turner for a recommendation for a City counterpart to interview.

BAC Meetings – 2020-2021 - Finally, before concluding the meeting, Chair Dahlin asked committee members about preferred meeting dates/times for the remainder of the academic year. All decided to look at the third Tuesday of the month, with confirmation from the School Board Clerk re: availability.

The meeting adjourned at 8:13 p.m.