

DATE: June 7, 2023

TO: Members of the Alexandria City School Board

FROM: School Board Budget Advisory Committee
Nancy Drane (Chair); Selena el Hajii; Jenica Patterson; Bill Pfister; Ryan Reyna (Vice Chair); Bridget Shea Westfall (Secretary); Lillian Vagnoni

SUBJECT: BAC End of Year Report and Recommendations 2022-2023

CC: Robert Easley, Director, Budget & Fiscal Compliance (ACPS Staff Liaison)
Kathy Stenzel, School Board Representative, BFAAC

The Alexandria City School Board Budget Advisory Committee (“BAC”) is pleased to submit this report summarizing its 2022-2023 activities and with a set of final recommendations to the School Board (“Board”).

Summary of 2022-2023 Activities

BAC met 8 times during the 2022-2023 year: October 4, 2022; November 1, 2022; December 8, 2022; January 11, 2023; February 8, 2023; April 12, 2023; May 3, 2023; and June 7, 2023.

BAC submitted a 2022-2023 Scope of Work to the Board in February 2023 (link [HERE](#)) that principally directed BAC to follow up on recommendations made in its June 2022 memo on Budget Communications (link [HERE](#)). To that end, BAC drafted an additional memo with recommendations related to the Community Budget Forum (link [HERE](#)) and presented to the Board on March 30, 2023 (link [HERE](#)) outlining key recommendations from its June 2022 report.

BAC also worked closely with its counterpart, the [City Council Budget and Fiscal Affairs Advisory Committee \(BFAAC\)](#) on a joint memorandum to City Council and School Board elected leaders with recommendations for strengthening city-wide collaboration (link [HERE](#)). That memo was informed by and followed meetings with elected leaders and key City and ACPS staff.

According to the Board’s [Advisory Committee Handbook](#), committee bylaws should be reviewed or affirmed by each committee annually, and must be approved by the Board every three years, or at least once during each Board term. Upon investigation, BAC learned that its bylaws were last approved in 2016, with such review long overdue. BAC voted to support the affirmation of the existing bylaws, with a few amendments to provide more direction on committee composition and to ensure BAC bylaws tracked language in Board policy and regulations. These Bylaws are being presented to the Board for approval under separate cover.

Finally, BAC engaged in regular conversation with ACPS staff and its Board liaison on budget-related issues and developed recommendations to be considered by the Board.

Each of these activities will be discussed in more depth below under [Recommendations](#).

Observations

During the course of the 2022-2023 academic year, BAC observed a heightened level of public engagement and interest in the budget development process, a very positive development in our view. However, how this engagement played out underscored the need for more robust and intentional community education on budget-related issues, particularly those issues that attract significant community attention, such as enrollment and capacity. This foundational information sharing should occur *before* the height of the budget season. This need was discussed at length in BAC's June 2022 Budget Communications memo, with detailed recommendations for ways to strengthen budget-related community education. In our view, public engagement is undermined if community members lack the accessible information they need to ensure their advocacy is well-informed. Having a common understanding within the community on foundational budget issues will promote more efficient, targeted, and ultimately valuable public feedback. Several of our recommendations below are directed towards advancing these principles.

Recommendations

BAC has submitted a series of detailed memos over the past several years containing specific recommendations aimed at strengthening the budget process and community engagement on budget issues. BAC strongly recommends that Board members carefully review these recommendations with an eye towards implementation. In some areas, the Board should consider providing direct guidance to the Superintendent and ACPS staff on recommendations it wishes to see implemented by ACPS, and how. As always, BAC is available to provide support as helpful. Specific ways the Board can move these recommendations forward are as follows:

Community Engagement on Budget Issues

1. **The Board should request a budget-related communications plan from ACPS Communications and Finance staff.** This plan should be presented during the Board's budget-related retreat and/or work sessions in Summer/early-Fall 2023. The plan should include clear deliverables, action steps, and timelines for a budget-related communications strategy and process, pulling out key recommendations from [BAC's June 2022 Budget Communications](#) memo. The plan should specifically identify and detail a package of digestible, bite-sized communications tools (i.e., budget-at-a-glance, one-page summaries on budget topics) and a timeline for drafting and publication that ensures they are released in tandem with other, denser budget documents (i.e., budget book). BAC also recommends the inclusion of a dynamic FAQ page on the ACPS website that staff can update throughout the budget process to capture Board member and community questions (and staff response). BAC is available to provide feedback or work in partnership with ACPS staff on the development of this plan if helpful, and BAC recommends the Board invite BAC to participate in the Board discussion and review of the communication plan. (This is in line with BAC Recommendation #8, below.)

2. **The Board should assume joint ownership of the Community Budget Forum along with ACPS Finance staff and BAC**, with delineated roles and responsibilities for each in event planning and execution based on [BAC's February 2022 Community Budget Forum recommendations](#). ACPS staff has already reached out to BAC to partner on Community Budget Forum planning, and we look forward to collaboration with the Board as well.

School Board Operations and Calendaring

3. **The Board should schedule a standalone work session in the Fall (*before the height of the budget season*) focused on enrollment, capacity, school assignment, and staffing issues – including topics like class size and assignment of specialized staff like ELL, *encore*, etc.** BAC's view is that more public education on these issues will facilitate better informed advocacy during the budget season. This work session should be framed as a '101' type overview of key considerations, procedures, and timelines related to these issues to orient the Board and community prior to the release of the Superintendent's proposed budget. The focus should be on *how* these decisions are made – not what these decisions may be in the future. This work session should be broadly communicated to encourage public viewing, with the content designed to be accessible to a public audience. The Board should consider engaging BAC as the work session is planned. Finally, BAC also recommends that digestible written materials be available to accompany the work session, to then be available publicly thereafter. For example, in the area of staffing, staff might consolidate information currently available in the budget book about various funding formulas and present it together as a comprehensive "[planning factors](#)" document.
4. **The Board should continue to provide feedback to ACPS staff on the budget calendar (2023 [HERE](#))**, returning to [BAC's May 2021 Budget Calendar recommendations](#) as appropriate. ACPS staff should be applauded for its work to modify the budget calendar to address Board requests. Two calendar issues that may require attention include:
 - a. This year a Joint Council-Board CIP work session was held on October 18, *before* the Superintendent released her proposed CIP budget on November 10. BAC received feedback that having the joint work session before the proposed CIP was released may have limited the efficacy of the joint session, or potentially given the misimpression that the CIP was fully developed at the time of the joint session. If the timing cannot be adjusted, care should be taken to ensure participants have clear expectations on the status of the developing CIP budget and possibility of changes subsequent to the joint work session.
 - b. This year, ACPS staff and the Board had only a few hours between the Council's budget vote on May 3, the Superintendent's revised CF/CIP budget release on May 4, and a May 5 at Noon deadline to submit budget questions. When the exact date of the City Council's budget adoption is determined, care should be taken to ensure ACPS staff and the Board have adequate time to respond.

5. **During its budget retreat, the Board should encourage ACPS staff to identify areas where the Board needs to provide direction or guidance to staff, especially in balancing (and potentially ranking) competing priorities.** For example, in an environment of limited funds, how should ACPS balance a desire to keep class sizes low while also ensuring staff compensation remains competitive – knowing that doing both might push ACPS beyond its financial capacity?

City Council-School Board Relations

6. **Board leadership should work with City Council leadership to arrange a late-Summer Joint Leadership Summit,** consistent with detailed joint recommendations outlined in the [May 2023 Joint City Council Budget and Fiscal Affairs Advisory Committee and School Board Budget Advisory Committee joint memo](#).

Stronger Utilization of BAC

7. **The Board should adopt BAC's recommended amendments to its bylaws.** This includes BAC's recommendation that each Board member nominate a BAC member. This model aligns with the way the [City Council directs membership of its Budget and Fiscal Affairs Advisory Committee](#) and should promote more robust utilization of BAC by the Board.
8. **The Board should consider including BAC in its annual retreat and/or in the series of budget priorities work session(s) held in August and September,** with thought towards what type of BAC involvement would most benefit the Board (e.g., as a way to incorporate community feedback into the discussion). This is consistent with BAC's bylaws, which direct BAC to “[make] recommendations to the School Board on budget priorities before the Board gives its annual budget direction to the Superintendent and at other times as appropriate.” For example, the City Council invites its BFAAC to attend its annual budget retreat, with BFAAC being a formal part of the agenda ([see November 2022 agenda, item VII](#)).

BAC appreciates the 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.