

HISD BUDGET WORKSHOP: #3

March 31, 2022

*Millard House II
Superintendent, Houston Independent School District*

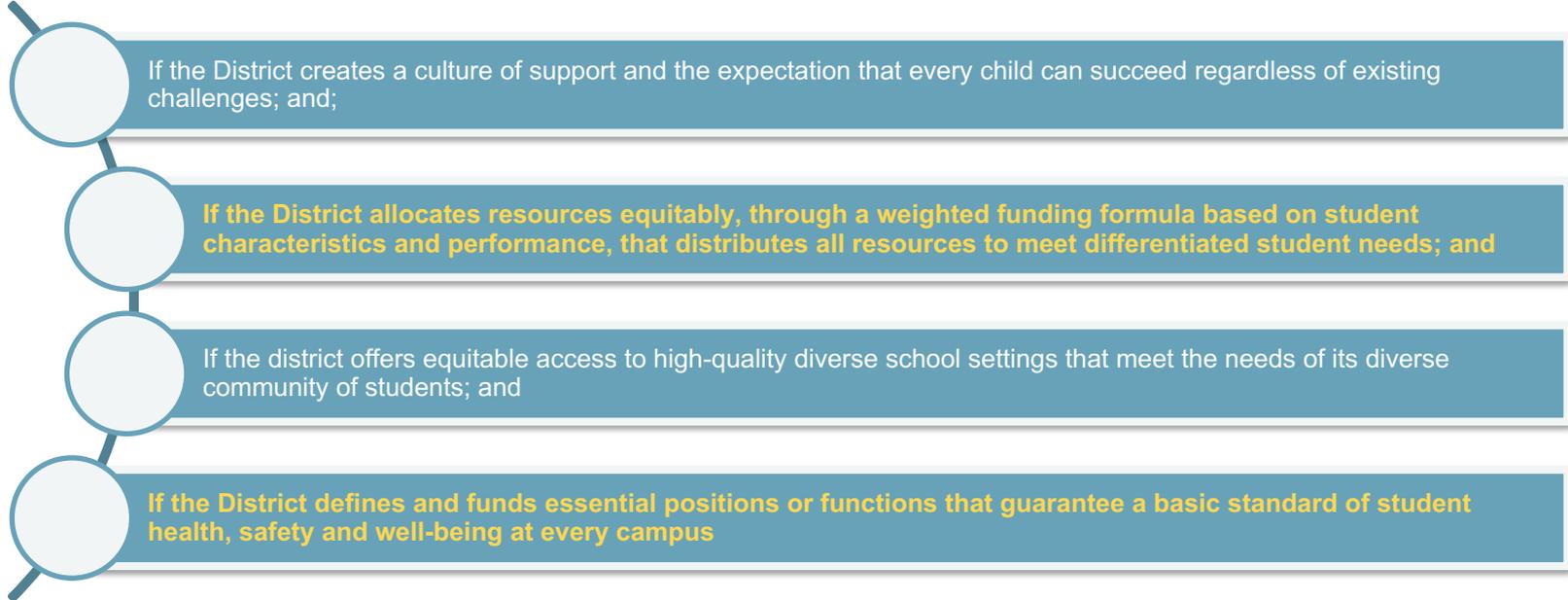


Board Vision

Every child shall have **equitable opportunities** and **equal access** to an effective and personalized education in a nurturing and safe environment. Our students will graduate as critical thinkers and problem solvers; they will know and understand how to be successful in a global society.



Alignment to the HISD Board Theory of Action



...Then campuses will be able to accomplish the Board's student outcome goals while honoring the Board's constraints

~ Board Policy AE(LOCAL)

Agenda

- 1. Overview of Hybrid Staffing/Funding Model**
 1. Components
 2. Research
 3. Benefits
- 2. Baseline Staffing Model Specifics**
 1. Process/Methodology
 2. Ratios
- 3. Discretionary Funding Specifics**
 1. Various Funding Sources
- 4. Campus Examples**
 1. Elementary
 2. Middle
 3. High School
- 5. Financial Landscape**
 1. Updated Projection for 2022-2023

OVERVIEW OF STAFFING/FUNDING MODEL

Characteristics of Current Model



CAMPUS-BASED AUTONOMY IN
BUDGETING, STAFFING, AND
CURRICULUM/PROGRAMMING



PER-UNIT-ALLOCATION
FUNDING MODEL IS AT THE
CORE OF DECENTRALIZATION

- Schools receive most of their funding through the PUA, a financial allocation determined by school size and student characteristics.
- Almost all characteristics of a school (teachers, classes/programs offered, athletics, support services, etc.) are dependent on two things:
 - Whether the school has sufficient funding
 - How the principal chooses to utilize the funding

Strengths and Weaknesses of Current Model

Strengths

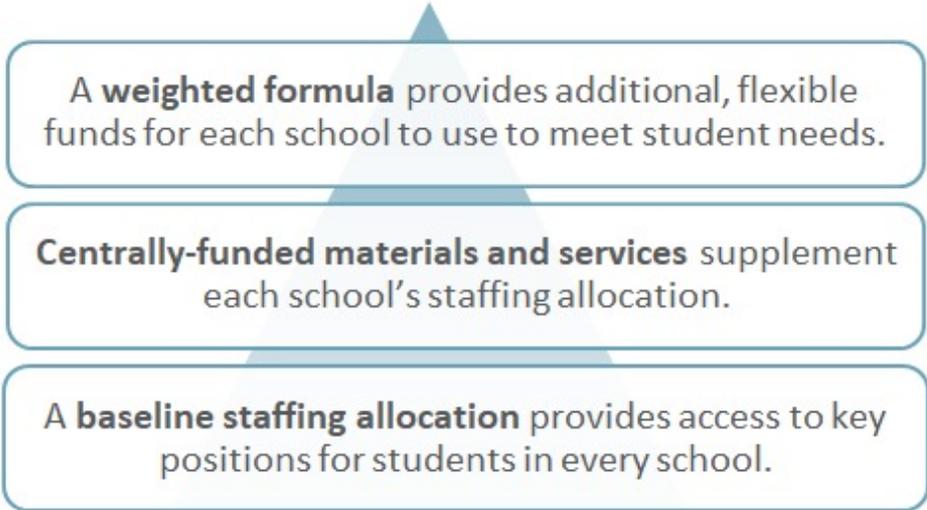
- * Allows for flexibility and innovation
- * Campus-level accountability
- * Incentivizes focus on student enrollment
- * Sites can adjust nimbly

Weaknesses

- * Students often lack access to key supports and experiences, especially at schools that have limited financial resources
- * Teacher-student ratios can be very high
- * Lack of adequate student support services (counseling, nursing, college/career advising etc.)
- * Lack of fine arts, athletics, and enrichment
- * Principals cannot focus on instructional leadership
- * Financial inefficiencies and mismanagement
- * Principal turnover creates greater instability
- * Critical items not part of accountability get overlooked
- * Vulnerable student populations, including mobile students, ELL, and students with disabilities, detrimentally impacted by variation in programming
- * Smaller schools don't benefit from economies of scale and are more expensive to operate.

Proposed Hybrid Model

- Administration is proposing a hybrid model where schools maintain a significant level of autonomy and flexibility layered on top of a core baseline set of expectations and equitably distributed resources.



A **weighted formula** provides additional, flexible funds for each school to use to meet student needs.

Centrally-funded materials and services supplement each school's staffing allocation.

A **baseline staffing allocation** provides access to key positions for students in every school.

Characteristics of Proposed Hybrid Model

- Schools receive discretionary funding from multiple sources to ensure that they maintain flexibility and autonomy and that there is joint accountability between campuses and district leadership.
- Schools receive a baseline of staffing that factors school size and grade-levels served.
- To ensure equitable access, the district centrally funds core student experiences and services, including athletics, fine arts, and advanced coursework.

Hybrid Staffing/Funding Model Comparison

	PUA Model	Hybrid Model	FTE Model
Resourcing <i>(How are funds distributed?)</i>	<ul style="list-style-type: none"> Majority of resources are allocated based on weighted factors 	<ul style="list-style-type: none"> Majority of resources allocated for required staffing based on enrollment and grade configuration Additional discretionary funds allocated by weighted factors 	<ul style="list-style-type: none"> Nearly 100% of resources are allocated centrally, with a very small amount of funds distributed directly to schools for use at the Principal's discretion
Staffing <i>(How are staffing levels at each school determined?)</i>	<ul style="list-style-type: none"> Decisions made by Principal with very few guidelines 	<ul style="list-style-type: none"> Majority of positions pre-determined with flexibility for some baseline positions Some discretionary funds may be used by Principal to add positions to the baseline 	<ul style="list-style-type: none"> All campus-based positions are allocated by the district Historically, decisions for hiring were also often centrally made

What Hybrid Model Makes Possible

- **The hybrid model results in increased financial efficiencies that will allow us to cover \$26 million of the \$56 million proposed compensation increase for teachers, principals, and other campus-based staff.**
- **Essential Positions** – Students at all schools will have access to supports and services provided by essential personnel, including teachers, counselors/social workers, nurses, librarians/media specialists, college/career advisors and other critical positions.
- **Teacher: Student Ratios** – The hybrid model ensures that every school offers adequate teacher to student ratios. For example, elementary schools will be staffed at a 22:1 ratio in grades K-4. Schools may choose to further reduce these ratios using their discretionary funding.
- **Early Childhood** – Early childhood classrooms will be staffed at an 11:1 adult: student ratio.
- **Fine Arts** – In addition to ensuring there are fine arts teachers at all schools in the district, the hybrid model allows the district to invest \$11 million annually for art supplies, equipment, uniforms, etc.
- **Technology** – The hybrid model ensures there will be a dedicated device support technician at the secondary schools and a shared device support technician at the early childhood / elementary schools to support the technology in schools.
- **Athletics/UII** - The hybrid model sets aside \$17.4 million to cover the costs for campuses to participate in athletics or UII activities.
- **Advanced Course Offerings** – The hybrid model enables the district to centrally cover the costs associated with international baccalaureate and dual credit programs, including annual fees, textbooks, and professional development.

Future Challenges in Continuing the Current Funding Model

- **Revenue is projected to decline in future years, and expenditures may increase due to external costs beyond our control such as recapture and benefits.**
 - Declining revenue and expenditures will mean that the district could have less funding available to support campuses through our PUA, cuts to PUA leave principals with more limited flexibility to meet student needs.
- **The district currently has 126 campuses that qualify for a small school subsidy at a total cost of approximately \$34M per year and given enrollment trends the number of small schools may increase in future years.**
 - We currently provide a subsidy to small campuses to meet their needs. If the number of small schools increases, it could mean an increased need for subsidies, or alternatively, shifting dollars away from schools with higher need populations to meet the subsidies.
- **District enrollment has declined over the past few years and is not projected to increase above pre-pandemic levels.**
 - While central office cuts have been the answer the last few years, these cuts continue to impact the support that can be provided to schools and families. There is only so much that can be cut centrally before it impacts critical support functions.

WHAT RESEARCH SAYS

Theory of Change



(De Grauwe, 2005)

Impact on Student Achievement

- "As such, we find no narrowing of the Black/white or Hispanic/white achievement gaps that can be attributed to the use of Weighted Student Funding (WSF). In fact, we found some evidence of *widening* achievement gaps." (Edunomics, 2020)
- "Decentralization [in HISD] was not associated with increases in TAAS pass rates three years after the reforms were fully implemented. Decentralization was not associated with increases in TAAS pass rates for [HISD] black students, Hispanic students, or economically disadvantaged students." (Stroub, HERC, 2019)
- While the intended purpose of decentralization is to boost student outcomes, there is not a correlation (Rodriguez, 2000).
- A meta-analysis of 83 studies that examined the relationship between decentralization and student achievement found "no firm, research-based knowledge about the direct or indirect effects of site-based management on students" and that the "effects on students are just as likely to be negative as positive." (Leithwood & Menzies, 1998).
- HISD has been decentralized for 20+ years, yet academic achievement gaps are still significant.

Support of Hybrid Model

- "Equity can be defined in terms of inputs or outcomes. If defined in terms of inputs, an equitable education finance system would be one in which all schools have equal – or equivalent – packages of educational inputs." (Ladd, 2005) This is known as *horizontal equity*.
- "When equity is designed in terms of the equality of outcomes, a distributionally equitable education system would, in theory, be one in which all schools have sufficient resources to achieve similar educational outcomes...Thus what matters is not only the characteristics of the individual students but also their concentration within a school." (Ladd, 2008) This is known as *vertical equity*.
- "There is mounting evidence that individual schools, especially schools serving low-performing students, are not able to succeed on their own. Instead, they need substantial support from intermediary institutions such as districts." (Ladd, 2008)
- "Many studies have acknowledged that investigations of resource distributions within districts must take into account both horizontal equity (equal treatment of equal students) and vertical equity (Requiring higher spending for students with greater needs)." (Miles & Roza, 2006)

BASELINE STAFFING MODEL SPECIFICS

Process Timeline of Planning & Feedback

November- January 2022

Considered shareholder feedback from listen & learns and surveys in the development of strategic plan.

- Assembled a cross functional team.
- Built understanding of current model, policy, state guidelines
- Learned from other staffing/budget models across the country
- Created an initial draft of a budget/staffing model
- ★ **Solicited an initial round of feedback & made adjustments**

Process Timeline of Planning & Feedback

February 2022

Ongoing
Principal
Engagement
&
Adjustments

- Solicited feedback from principals at February 3 Superintendent Leadership Collaborative
- ★ **Made adjustments to the model**
- Hosted a principals' Listen and Learn Lunch on February 18 for additional feedback
- ★ **Made adjustments to the model**
- Met with Superintendent Leadership Council on February 23 to gather additional feedback
- Engaged individual and small groups of principals
- ★ **Made adjustments to the model**

Process Timeline of Planning & Feedback

March 2022



Ongoing
Principal
Engagement
&
Adjustments

- Principals received first school specific allocations on March 2, engaged in workshop, and provided feedback
- ★ **Made adjustments to the model**
- Continued to engage individual principals on impacts/needs
- ★ **Made adjustments to the model**
- Principals received a second iteration of staffing/budget allocations week of March 21
- Principals provided feedback
- ★ **Made additional adjustments**
- Principals received finalized staffing/budget allocations week of March 28

Changes Made Based on Principal Feedback

- Decreased middle school ratio to lower class size.
- Decreased clerical ratio to ensure adequate secretarial support.
- Allowed for continued use of Teacher Specialists to serve as evaluators for an additional year.
- Provided flexibility to reallocate some baseline positions.
- Increased budgetary allocations through Title I and ESSER.
- Increased ESSER flexibility to allow funding of positions.
- Allotted a discretionary IB monetary allocation.
- Supplemented positions for small/specialty school/programs.

Baseline Staffing: Allocated Positions



General Education Teachers



Librarian or Media Services Specialist



Administrative Assistant

ALL SCHOOLS



Nurse or Associate Nurse



Student Information Representative



Clerical Worker(s)



Assistant Principal(s) or Dean(s) or Teacher Specialist(s)



Physical Education Teacher(s)



Wraparound Specialist(s)



Counselor(s) or Social Worker(s) or SEL Campus Specialist(s)



Fine Arts Teacher(s)



Principal

MIDDLE AND HIGH SCHOOLS ONLY



College and Career Advisor(s)

HIGH SCHOOLS ONLY



Health Assistant



High School Campus Testing Coordinator



Registrar

ELEMENTARY SCHOOLS ONLY



Pre-K Teaching Assistant(s)

Baseline Staffing: Required vs. Flexible Positions

Required	Flexible
<p>The number of positions in this category may not be reduced from the baseline staffing allocation.</p>	<p>Any of these allocated positions may be reallocated if the principal demonstrates how they will meet related programmatic requirements and the intended purpose in another way.</p>
<ul style="list-style-type: none"> • Teachers* • Teaching Assistants • Principal • Administrative Assistant • Registrar • Librarian/Media Services Specialist • Nurse/Associate Nurse • ROTC Positions • Counselor/Social Worker/SEL Campus Specialist • College and Career Advisor • Wraparound Specialist 	<ul style="list-style-type: none"> • Clerical Worker • Health Assistant • Teachers (Flex) • High School Campus Testing Coordinator • Student Information Rep • Assistant Principal/Dean of Instruction/Teacher Specialist**

**excluding those allocated as “Flex”*

***subject to additional restrictions*

Librarians/Media Services Specialists



Every elementary, middle and high school in the district is allocated a librarian/media services specialist to ensure that students develop a passion and aptitude for reading, research, and critical thinking skills.

Nurses



Every school is allocated a nurse/associate nurse position. Both positions are medical providers licensed to work with children in schools.

Large high schools are also allocated a health assistant.

Teaching Assistants

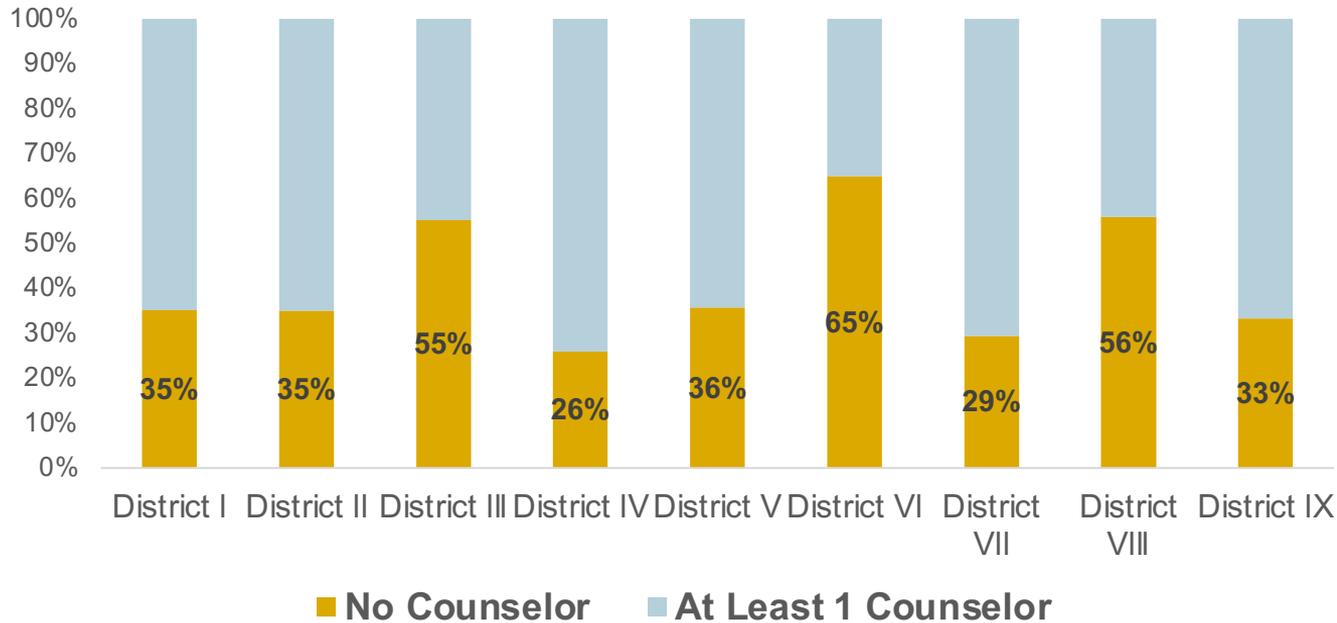


Our staffing model prioritizes teaching and learning. In pre-K, this includes the smallest student-to-adult ratio of any grade level to support early learning.

Pre-K staffing allocations are based on a 22:1 student-to-teaching assistant ratio and a 22:1 student-to-teacher ratio. Together, these allocations provide for an 11:1 student-to-adult ratio for pre-K classrooms.

School Counselors: Positions in FY22

Schools by Trustee District in Fiscal Year 2022



At least 146 schools will have more Counselor positions from General Funds next year than they do today.

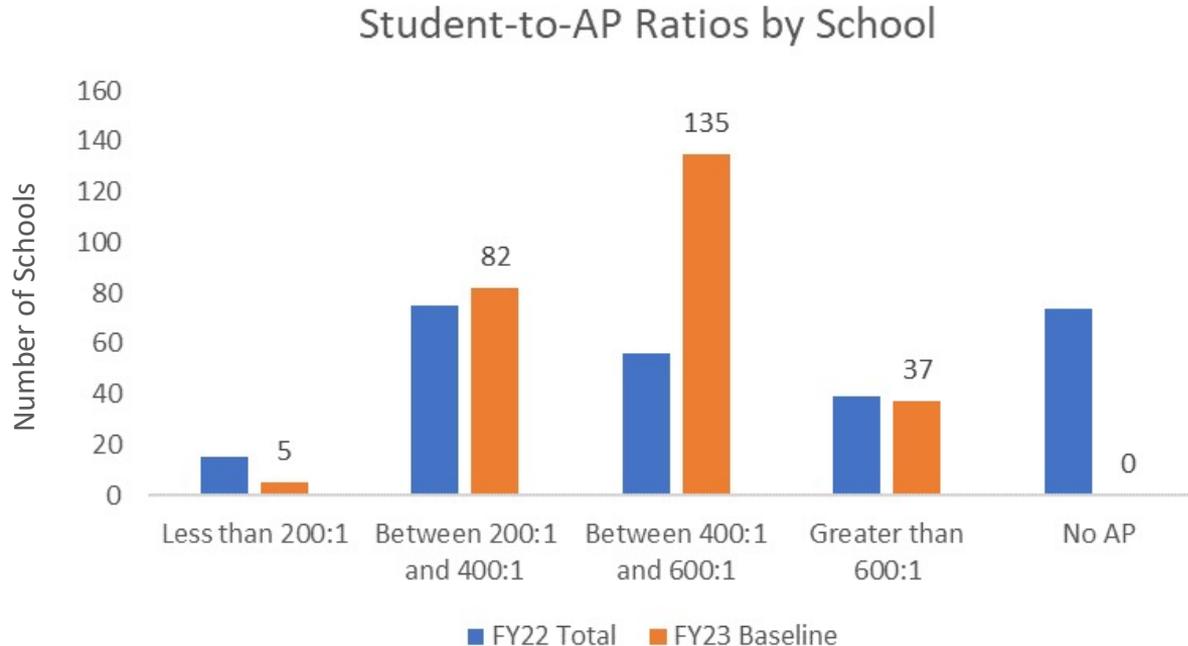
School Counselors: Baseline Staffing Allocations

	Elementary	Middle	High
Baseline Staffing Model Position Allocation	<ul style="list-style-type: none"> • ½ Counselor for <250 students • 1 Counselor for 250-750 students • 2 Counselors for >750 students 	500:1 student to Counselor ratio <i>plus</i> 1 College and Career Advisor per school	450:1 student to Counselor ratio <i>plus</i> 450:1 student to College and Career Advisor ratio
Projected SY 2022-2023 Ratio from Baseline Positions Alone	461:1	296:1 (combined)	214:1 (combined)

Assistant Principals: Sample Comparison Districts

HISD Baseline Staffing Model	"District 1"	"District 2"	"District 3"
<p>Elementary:</p> <ul style="list-style-type: none"> • 500:1 student to AP ratio <p>Middle and High:</p> <ul style="list-style-type: none"> • 450:1 student to AP ratio <p>Overall projected SY 2022-2023 ratio of 452:1 from baseline positions alone</p>	<p>Elementary:</p> <ul style="list-style-type: none"> • 600-900 students: 1 • >900 students: 2 <p>Middle and High:</p> <ul style="list-style-type: none"> • 300:1 student to AP ratio 	<p>Elementary:</p> <ul style="list-style-type: none"> • 0-1,350 students: 2 • >1,350 students: 3 <p>Middle:</p> <ul style="list-style-type: none"> • 0-1,700 students: 3 • >1,700 students: 4 <p>High:</p> <ul style="list-style-type: none"> • 0-1,199 students: 3 • >1,199 students: 4-8 	<p>Elementary and Middle:</p> <ul style="list-style-type: none"> • 550-849 students: 1 • >849 students: 2 <p>High:</p> <ul style="list-style-type: none"> • 0-549 students: 1 • 550-999 students: 2 • >999 students: 3

Assistant Principals: FY22 Total and FY23 Baseline



Sample Baseline Staffing Model: Elementary School

Position	Fixed	Minimum	Ratio (rounded to nearest 1 position)
Principal	1		
Administrative Assistant	1		
Librarian/Media Services Specialist	1		
Student Information Rep.	1		
Nurse (RN)/Associate Nurse (LVN)	1		
Assistant Principal/Dean of Instruction/Teacher Specialist	11) Click to add text	1	500:1
Pre-K Teacher		1	22:1
Pre-K Teaching Assistant		1	22:1
Teacher (Grades K-4)		1	22:1
Teacher (Grade 5)		1	27:1
Teacher – Fine Arts		1	450:1
Teacher – PE		1	450:1
Clerical (General Clerk II): One 12M; others 11M		1	300:1
Counselor/Social Worker/Social and Emotional Learning Campus Specialist		0.5	1-249 = 0.5 250-750 = 1.0 751+ = 2.0

Note: Earlier versions of baseline staffing models for all grade configurations were previously provided in the Board Q&A for March 10, 2022.

Baseline Staffing Model: Early Childhood Campus

Position	Fixed	Minimum	Ratio (rounded to nearest 1 position)
Principal	1		
Administrative Assistant	1		
Assistant Principal/Dean of Instruction/Teacher Specialist	1		
Librarian/Media Services Specialist	1		
Student Information Rep.	1		
Nurse (RN)/Associate Nurse (LVN)	1		
Counselor/Social Worker/Social and Emotional Learning Campus Specialist	1		
Clerical (General Clerk II): One 12M; others 11M	1		
Teacher – Fine Arts	1		
Teacher (PK, K, and 1)		1	22:1
Pre-K Teaching Assistant		1	22:1

Baseline Staffing Model: Pre-K – Grade 8 School

Position	Fixed	Minimum	Ratio (rounded to nearest 1 position)
Principal	1		
Administrative Assistant	1		
Librarian/Media Services Specialist	1		
Student Information Rep.	1		
Nurse (RN)/Associate Nurse(LVN)	1		
Assistant Principal/Dean of Instruction/Teacher Specialist		1	500:1
Pre-K Teacher		1	22:1
Pre-K Teaching Assistant		1	22:1
Teacher (Grades K-4)		1	22:1
Teacher (Grade 5)		1	27:1
Teacher – Fine Arts (Grades PK-5)		1	PK-5: 450:1
Teacher – PE (Grades (PK-5)		1	PK-5: 450:1
Teacher (Grades 6-8)			Core MS Staffing Calculation based on 26:1 ratio
Teacher – Art (Grades 6-8)		1	<i>Built into Core Staffing Calculation (no additional allocation)</i>
Teacher – Music (Grades 6-8)		1	
Teacher – PE (Grades 6-8)		1	
Clerical (General Clerk II): One 12M; others 11M		1	300:1
Counselor/Social Worker/SEL Campus Specialist		1	350:1
College & Career Advisor	1		

Baseline Staffing Model: Middle School

Position	Fixed	Minimum	Ratio (rounded to nearest 1 position)
Principal	1		
Administrative Assistant	1		
Librarian/Media Services Specialist	1		
Student Information Rep.	1		
Nurse (RN)/Associate Nurse (LVN)	1		
College & Career Advisor	1		
Assistant Principal/Dean of Instruction/Teacher Specialist		1	450:1
Teacher			Core Staffing Calculation based on 26:1 ratio <i>Built into Core Staffing Calculation (no additional allocation)</i>
Teacher – Art		1	
Teacher – Music		1	
Teacher – PE		1	
Clerical (General Clerk II): One 12M; others 11M		1	300:1
Counselor/Social Worker/Social and Emotional Learning Campus Specialist		1	500:1

Baseline Staffing Model: Grades 6-12 School

Position	Fixed	Minimum	Ratio (rounded to nearest 1 position)
Principal	1		
Administrative Assistant	1		
Librarian/Media Services Specialist	1		
High School Campus Testing Coordinator	1		
Student Information Rep.	1		
Registrar	1		
Nurse (RN)/Associate Nurse (LVN)	1		
Health Assistant	1 for schools with >1,000		
Assistant Principal/Dean of Instruction/Teacher Specialist		1	450:1
Teacher			Core MS Staffing Calculation based on 26:1 ratio Core HS Staffing Calculation based on 27:1 ratio
Teacher – Art		1	<i>Built into Core Staffing Calculations (no additional allocation)</i>
Teacher – Music		1	
Teacher – PE		1	
Flex Teacher	3		
Clerical (General Clerk II): One 12M; others 11M		1	300:1
Counselor/Social Worker/Social and Emotional Learning Campus Specialist		1	500:1 MS 450:1 HS
College & Career Advisor		1	450:1

Baseline Staffing Model: High School

Position	Fixed	Minimum	Ratio (rounded to nearest 1 position)
Principal	1		
Administrative Assistant	1		
Librarian/Media Services Specialist	1		
High School Campus Testing Coordinator	1		
Student Information Rep.	1		
Registrar	1		
Nurse (RN)/Nurse Associate (LVN)	1		
Health Assistant	1 for schools with >1,000		
Assistant Principal/Dean of Instruction/Teacher Specialist		1	450:1
Teacher			Core Calculation based on 27:1 ratio
Teacher – Art		1	<i>Built into Core Staffing Calculation (no additional allocation)</i>
Teacher – Music		1	
Teacher – PE		1	
Flex Teacher			0-500 = 1 501-1,000 = 2 1,001-2,000 = 4 >2,000 = 6
Clerical (General Clerk II): One 12M; others 11M		1	300:1
Counselor/Social Worker/SEL Campus Specialist		1	450:1
College & Career Advisor		1	450:1

Supplemental Positions



**Allocation
of 83
additional
positions**

Multi-grade span schools and/or specialty program
Ensure enough high school core offerings to meet graduation requirements
Class size/teacher course reduction for small schools
Bilingual, dual language, and enrichment programs that require extra staffing to maintain programming

Baseline Staffing Model Takeaways

- We ensure that every student in every school has access to the essential positions or functions that **guarantee a basic standard** for student health, safety, and well-being at every campus. This addresses both academic and non-academic well-being.
- Most other districts allocate positions to schools, and even many with a PUA-like formula dictate positions a school must fund. Still, we implemented an **iterative process with repeated school feedback** to develop the hybrid model for FY23.
- Principals have the authority to make - and are responsible to make - staffing decisions for the positions they are allocated **and to supplement their baseline positions** with additional positions that meet the needs of their students.

DISCRETIONARY FUNDING SPECIFICS

Discretionary/Flexible Campus Funding

In addition to baseline positions and centrally funded materials and services, schools will receive the following discretionary funding:

- Non-Salary General Funds
- Weighted Funding General Funds
- Magnet General Funds ↑
- Non-Salary CTE General Funds
- Bilingual/ESL General Funds
- Title 1 Federal Funds ↑
- ESSER Federal Funds ↑

These flexible funds could be used for things such as:

- * Additional staff
- * Student experiences and enrichment
- * Materials and supplies
- * Specialized programs
- * Professional development
- * Student Interventions

Specifics

In addition to the staffing levels allocated by this model, schools will have access to these flexible, discretionary funds during the 2022-2023 school year:

Funding Source	Recurring Funds	One-Time Funds	Notes
Weighted General Funding	\$29.9 million	-	Based on at-risk indicators
Non-Salary General Funds	\$12.4 million	-	Based on enrollment size
Magnet Funds	\$21.8 million	-	Includes increased allocation to enable magnet expansion
Non-Salary CTE Funds	\$2.9 million		
Bilingual/ESL Funds	\$5.4 million		
Title 1 Funds	\$63 million	\$12 million	Reflects a \$10 million increase in recurring allocations and \$12 million in one-time funding
ESSER Funds	-	\$100 million	Reflects a \$50 million increase in campus discretionary funding. Allocation also planned for 2022-2023.
TOTAL	\$135.4 million	\$112 million	

On top of these discretionary funds, students/schools will receive \$61 million in additional and recurring direct centrally funded supports and resources.

Weighted Funding Allocation

To provide additional supports to schools based on the barriers to success at their campuses, HISD developed a new weighted allocation methodology to distribute State Compensatory Education (SCE) and ESSER funds in support of the staffing model.

Using analysis of instructional and social barriers (compiled by Research and Accountability) HISD identified 3 roughly similar sized groupings, and calculated per-student allocations to achieve the following goals

1. All schools will receive some level of discretionary funding allocated through these formulas
2. Funding levels increase based on campus need (to compensate for the removal of weighted funding in the PUA model)
3. Highest need schools receive the highest levels of this funding
4. Funding levels scale based on number of students

The table below summarizes how ESSER and State Compensatory Education (SCE) funds will be distributed across schools based on these tiers.

Student Barrier Level	Average of Barrier Scores	# of schools in each category	\$ per student (ESSER)	Total Funds (ESSER)	\$ Per Student (SCE)	Total Funds (SCE)	Total Funds (ESSER + SCE)
Tier I	2 to .1	89	\$150	\$10,430,250	\$90	\$6,310,502	\$16,740,752
Tier II	.1 to -.4	89	\$300	\$18,992,100	\$180	\$11,520,669	\$30,512,769
Tier III	-.4 to -2	81	\$450	\$20,206,800	\$269	\$12,053,784	\$32,260,584
Totals				\$49,629,150		\$29,884,955	\$79,514,105

Centrally-Funded Materials and Services

ALL SCHOOLS



Fine Arts Programs



Athletic Programs



Employee Stipends



Copiers



Advanced Placement/
International Baccalaureate/
Montessori Program
Support



Career and Technical
Education Supports



Gifted and Talented
Programming



IT Resources
and Support



University Interscholastic
League Programs



Substitute Teachers



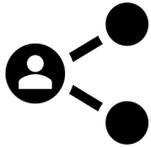
Special Education
Supports



Curriculum and Professional
Development

CAMPUS EXAMPLES

Principal Feedback



"Keep up the great progress as the updates to staffing are being received in a positive outlook from principals..."

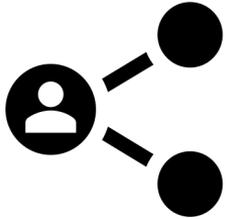
Everette Hare
Principal, Worthing High School
President of HASA

Principal Feedback

"I wanted to show my appreciation to the HISD Team for supporting Middle College High School at Fraga. I felt more comfortable with next year budget centralization after meeting today with Dr. Ponce, Mr. Chandler, and budget team. Our new plan will allow more full-time positions to accommodate the instructional need of our students.

The new model will provide stability to the team and has created an opportunity to reflect on next year's goals with the intention of empowering key members to embrace new roles to support teachers, students, and parents. The centralization of funds will support the principal on not spending too much time on office/accounting duties and will also create a check-in process with superiors to review progress, receive feedback and connect with district specialist/departments."

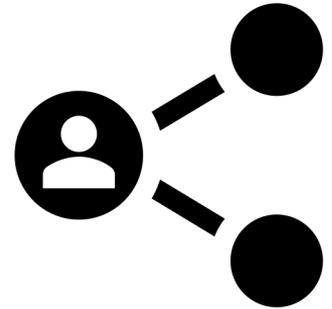
Principal Fraga Middle College



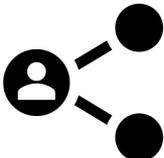
Principal Feedback

"I want to thank you for advocating for our campuses to receive equitable funding under the FTE model. I must admit that I was nervous about the move from the PUA as a new high school principal. However, after receiving my allocations on Wednesday and working through the complexities and flexibility with my HSO leaders and principal colleagues, I am confident that we can push Wisdom to the next level with this new funding model. Coupled with my external funds, we will more than be able support all of our campus needs. Thank you for listening to the HSO AdHoc recommendations."

**Kenneth Brantley, Principal
Wisdom High School**



Principal Feedback



"I wanted to take a moment to share my appreciation for the commitment in ensuring all HISD students have the equitable resources needed to be successful. When reviewing the current model for high schools, I recognize the priorities our district has in ensuring campuses have the staffing to support academics, physical and social-emotional wellbeing, and post-secondary success. Likewise, I respect our district's aim to support logistical campus and building needs as these types of supports provide more opportunity to focus on our primary task at hand, making sure students are learning and progressing at the highest level possible. I acknowledge the difficulties that may come with a change from our current financial model but do appreciate the opportunity to provide feedback. Likewise, I am thankful for the transparency that has been communicated regarding flexibility as the new financial model is adjusted."

**Luis Landa, Principal
Chavez High School**

School-Level Budget & Staffing Allocation: Sheet Overview

School Overview

School Overview	
Select School Name:	Berry ES
School Number:	109
Projected Enrollment:	740
Assistant Superintendent:	Shana Perry

School Enrollment by grade level

Demographer Projected Enrollment by Grade	
EE	1
PK	97
KG	105
01	105
02	100
03	120
04	101
05	111
06	-
07	-
08	-
09	-
10	-
11	-
12	-
Total	740

Discretionary Funding

- Non-Salary
- Weighted Funding
- Magnet Allocation
- Bilingual Allotment
- ESSER
- Title I

Other Funding	
GF - Non-Salary	\$ 44,400
Fund Funding (SCE)	\$ 203,553
Non-Salary	\$ -
	\$ 223,193
	\$ 29,777
	\$ -
	\$ 263,505
her	
intervention MS & 6-12	\$ -
Time Funding	\$ 120,000
4545 Intervention	\$ 38,803
MR TSI	\$ -
MR Wraparound	\$ 53,791
ovation	\$ 10,272
cher	
Specialists/Intervention - ES & K-8	\$ 88,830
ESSER - Tiered Funding	\$ 333,000

Baseline Positions			
Positions	Snapshot	New	Change
Principal	1.00	1.00	-
AP/Deans/Teacher Specialist	1.00	1.00	-
Clerical	3.50	2.00	(1.50)
Administrative Assistant	1.00	1.00	-
Registrar	-	-	-
Librarian / Media Specialist	-	-	-
Nurse	1.00	-	-
Assistant Nurse	-	-	-
Total Admin	7.50	-	-
Classroom Teachers	37.25	-	-
Classroom Teachers (CTE)	-	-	-
Classroom Teachers (Flex)	-	-	-
Other Teachers	-	-	-
Teaching Assistants	3.00	-	-
Teacher Specialist	2.00	-	-
ROTC	-	-	-
Total Classroom	42.25	-	-
Counselors/Social Workers	-	-	-
College Advisor	-	-	-
Student Data Assessment Specialist	-	-	-
Student Information / Reps	1.00	1.00	-
Total Student Support	1.00	2.00	1.00
Total Other	2.50	-	(2.50)
Total From PUA/Staffing Model	53.25	50.00	(3.25)

Other Positions		
Position	Fund Source	Current
Teacher Specialist/Intervention - ES & K-8	ESSER	Current
Teacher Specialist/Intervention - MS & 6-12	Title I	New
Instructional Technologist (Verizon)	Title I - Partial	Current
	GF/ESSER	New
IT Customer Service Reps.		
Wraparound Specialists	GF	Current

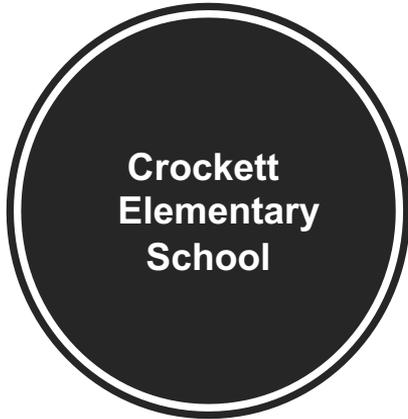
Notes:
 1. Current personnel includes PUA, A180, and one-time funded positions
 2. Magnet and Title I positions on page 2 must be paid for from FY23 allocation

Baseline Position Allocation

- January 2022 Staffed Positions
- New 2022-23 Position Allocation
- Fixed and Flexible Positions
- Art, Music & PE included in Classroom Teacher Allocation

Other Positions

- Wrap Around Specialists
- Interventions Specialists
- Instructional Technology Support



Crockett
Elementary
School

\$804K Discretionary
Funding

School Overview	
Select School Name:	Crockett ES
School Number:	135
Projected Enrollment:	533

Increase of Librarian/Media
Specialist Position

PK	38
KG	76
01	87
02	88

Reduction of 1 Teacher;
Increase of 1 Teaching
Assistant

08	-
09	-

Increase of Counselor

Other Funding	
GF - Non-Salary	\$ 31,980
GF - Weighted Funding (SCE)	\$ 48,645
GF - CTE Non-Salary	\$ -
GF - Magnet	\$ 279,132
GF - Bilingual	\$ 12,925
GF - IB Pr	
60%)	
Title I - Re	
Title I - Teacher	
Specialist/Intervention MS & 6-12	\$ -
Title I - One-Time Funding	\$ 80,000
ESSER - HB4545 Intervention	\$ 37,116
ESSER - CCMR TSI	\$ -
ESSER - CCMR Wraparound	\$ 18,642
ESSER - Innovation	\$ 7,120
ESSER - Teacher	
Specialist/Intervention - ES & K-8	\$ 88,830
ESSER - Tiered Funding	\$ 79,950

Increase of
Information Technology
Support

Office
Admin
Classroom
Student Support

Baseline Positions			
Positions	Snapshot	New	Change
Principal	1.00	1.00	-
AP/Deans/Teacher Specialist	1.00	1.00	-
Clerical	2.00	2.00	-
Administrative Assistant	1.00	1.00	-
Registrar	-	-	-
Librarian / Media Specialist	-	1.00	1.00
Nurse	1.00	1.00	-
Assistant Nurse	-	-	-
Total Admin	6.00	7.00	1.00
Classroom Teachers	26.00	25.00	(1.00)
Classroom Teachers (CTE)	-	-	-
Classroom Teachers (Flex)	-	-	-
Other Teachers	-	-	-
Teaching Assistants	1.00	2.00	1.00
Teacher Specialist	-	-	-
ROTC	-	-	-
Total Classroom	27.00	27.00	-
Counselors/Social Workers	-	1.00	1.00
College Advisor	-	-	-
Student Data Assessment Specialist	-	-	-
Student Information / Reps	1.00	1.00	-
Total Student Support	1.00	2.00	1.00
Total Other	-	-	-
Total From PUA/Staffing Model	34.00	36.00	2.00

Other Positions			
Position	Fund Source	Current/New	Value
Teacher Specialist/Intervention - ES & K-8	ESSER	Current	1
Teacher Specialist/Intervention - MS & 6-12	Title I	New	0
Instructional Technologist (Verizon)	Title I - Partial	Current	0
	GF/ESSER	New	Shared
IT Customer Service Reps.			
Wraparound Specialists	GF	Current	1

- Notes:
1. Current personnel includes PUA, A180, and one-time funded positions
 2. Magnet and Title I positions on page 2 must be paid for from FY23 allocation



Neff Early Childhood Center

\$836K Discretionary Funding

School Overview

Select School Name:	Neff ECC
School Number:	209

Increase of Librarian/Media Specialist Position

EE	-
PK	190
KG	185
01	190

Reduction of 1 Teacher; Increase of 9 Teaching Assistants

07	-
08	-
09	-
10	-

Increase of Counselor

Other Funding	
GF - Non-Salary	\$ 33,900
GF - Weighted Funding (SCE)	\$ 152,934
GF - CTE Non-Salary	\$ -
GF - Magnet	\$ -
GF - Bilingual	\$ 36,730
GF - IB Program (Coordinator 60%)	\$ -
Title I - Reg	\$ -
Title I - Tea Specialist/	\$ -
Title I - One-time Funding	\$ 120,000
ESSER - HB4545 Intervention	\$ -
ESSER - CCMR TSI	\$ -
ESSER - CCMR Wraparound	\$ 38,732
ESSER - Innovation	\$ 10,086
ESSER - Teacher Specialist/Intervention - ES & K-8	\$ -
ESSER - Tiered Funding	\$ 254,250

Increase of Information Technology Support

Baseline Positions			
Positions	Snapshot	New	Change
Principal	1.00	1.00	-
AP/Deans/Teacher Specialist	-	1.00	1.00
Clerical	4.00	1.00	(3.00)
Administrative Assistant	1.00	1.00	-
Registrar	-	-	-
Librarian / Media Specialist	-	1.00	1.00
Nurse	1.00	1.00	-
Assistant Nurse	-	-	-
Total Admin	7.00	6.00	(1.00)
Classroom Teachers	27.90	27.00	(0.90)
Classroom Teachers (CTE)	-	-	-
Classroom Teachers (Flex)	-	-	-
Other Teachers	-	-	-
Teaching Assistants	-	9.00	9.00
Teacher Specialist	2.00	-	(2.00)
ROTC	-	-	-
Total Classroom	29.90	36.00	6.10
Counselors/Social Workers	-	1.00	1.00
College Advisor	-	-	-
Student Data Assessment Specialist	-	-	-
Student Information / Reps	1.00	1.00	-
Total Student Support	1.00	2.00	1.00
Total Other	10.00	-	(10.00)
Total From PUA/Staffing Model	47.90	44.00	(3.90)

Other Positions			
Position	Fund Source	Current/New	Value
Teacher Specialist/Intervention - ES & K-8	ESSER	Current	0
Teacher Specialist/Intervention - MS & 6-12	Title I	New	0
Instructional Technologist (Verizon)	Title I - Partial	Current	0
Customer Service Reps.	GF/ESSER	New	Shared
Wraparound Specialists	GF	Current	1

- Notes:**
1. Current personnel includes PUA, A180, and one-time funded positions
 2. Magnet and Title I positions on page 2 must be paid for from FY23 allocation

Arabic Language Immersion

School Overview	
Select School Name:	Arabic Immersion
School Number:	478
Projected Enrollment:	468

Increase of Librarian/Media Specialist Position

EE	-
PK	66
KG	74
01	76
02	62

Increase of 3 Teachers and 2 Teaching Assistants

07	-
08	-
09	-
10	-

Increase of Counselor & College Career Advisor

Other Funding	
GF - Non-Salary	\$ 28,860
GF - Weighted Funding (SCE)	\$ 40,477
GF - CTE Non-Salary	\$ -
GF - Magnet	\$ 131,360
GF - Bilingual	\$ 31,168
GF - IB Prog (60%)	
Title I - Regu	
Specialist/Intervention MS & 6-12	\$ -
Title I - One-Time Funding	\$ 80,000
ESSER - HB4545 Intervention	\$ 14,315
ESSER - CCMR TSI	\$ -
ESSER - CCMR Wraparound	\$ 16,072
ESSER - Innovation	\$ 5,580
ESSER - Teacher Specialist/Intervention - ES & K-8	\$ 88,830
ESSER - Tiered Funding	\$ 70,200

Increase of Information Technology Support

\$584K Discretionary Funding

Baseline Positions			
Positions	Snapshot	New	Change
Principal	1.00	1.00	-
AP/Deans/Teacher Specialist	-	2.00	2.00
Clerical	1.50	2.00	0.50
Administrative Assistant	1.00	1.00	-
Registrar	-	-	-
Librarian / Media Specialist	-	1.00	1.00
Nurse	1.00	1.00	-
Assistant Nurse	-	-	-
Total Admin	4.50	8.00	3.50
Classroom Teachers	22.18	24.00	1.82
Classroom Teachers (CTE)	-	-	-
Classroom Teachers (Flex)	-	-	-
Other Teachers	-	1.50	1.50
Teaching Assistants	0.68	3.00	2.32
Teacher Specialist	1.00	-	(1.00)
ROTC	-	-	-
Total Classroom	23.86	28.50	4.64
Counselors/Social Workers	0.60	2.00	1.40
College Advisor	-	1.00	1.00
Student Data Assessment Specialist	-	-	-
Student Information / Reps	-	1.00	1.00
Total Student Support	0.60	4.00	3.40
Total Other	0.09	-	(0.09)
Total From PUA/Staffing Model	29.05	40.50	11.45

Other Positions			
Position	Fund Source	Current/New	Value
Teacher Specialist/Intervention - ES & K-8	ESSER	Current	1
Teacher Specialist/Intervention - MS & 6-12	Title I	New	0
Instructional Technologist (Verizon)	Title I - Partial GF/ESSER	Current	0
		New	1
IT Customer Service Reps.			
Wraparound Specialists	GF	Current	1

Notes:

1. Current personnel includes PUA, A180, and one-time funded positions
2. Magnet and Title I positions on page 2 must be paid for from FY23 allocation



\$2.9 M Discretionary Funding

School Overview	
Assistant Principal	-

Reduction of 1 Assistant Principal

Demographer Projected Enrollment by Grade	
EE	-
PK	-
KC	-
06	-
07	-
08	-

Increase of 11 Teachers

Other Funding	
GF - Non-Salary	\$ 165,840
GF - Weighted Funding (SCE)	\$ 375,694
GF - CTE Non-Salary	\$ 115,170
GF - Magnet	\$ 281,577
GF -Bilingual	\$ 44,993
GF - IB Program (Coordinator 60%)	
Title I - Regu	
Title I - Teach	
Specialist/Intervention - MS & 6-12	
Title I - One-Time Funding	\$ 80,000
ESSER - HB4545 Intervention	\$ 429,185
ESSER - CCMR TSI	\$ 40,738
ESSER - CCMR Wraparound	\$ 73,881
ESSER - Innovation	\$ 32,065
ESSER - Teacher Specialist/Intervention - ES & K-8	\$ -
ESSER - Tiered Funding	\$ 621,900

Increase of 2 Counselors and 5 College Advisors

Increase of 2 Information Technology Support Positions

Admin/ Front Office

Class

Student Support

Baseline Positions			
Positions	Snapshot	New	Change
Principal	1.00	1.00	-
AP/Deans/Teacher Specialist	6.00	5.00	(1.00)
Clerical	11.00	7.00	(4.00)
Administrative Assistant	1.00	1.00	-
Registrar	1.00	1.00	-
Librarian / Media Specialist	1.00	1.00	-
Nurse	1.00	1.00	-
Assistant Nurse	-	1.00	1.00
Total Admin	22.00	18.00	(4.00)
Classroom Teachers	68.00	74.00	6.00
Classroom Teachers (CTE)	16.00	14.88	(1.12)
Classroom Teachers (Flex)	-	6.00	6.00
Other Teachers	-	-	-
Teaching Assistants	-	-	-
Teacher Specialist	5.00	-	(5.00)
ROTC	2.00	2.00	-
Total Classroom	91.00	96.88	5.88
Counselors/Social Workers	3.00	5.00	2.00
College Advisor	-	5.00	5.00
Student Data Assessment Specialist	-	1.00	1.00
Student Information / Reps	4.00	1.00	(3.00)
Total Student Support	7.00	12.00	5.00
Total Other	8.00	-	(8.00)
Total From PUA/Staffing Model	128.00	126.88	(1.12)

Other Positions			
Position	Fund Source	Current/New	Value
Teacher Specialist/Intervention - ES & K-8	ESSER	Current	0
Teacher Specialist/Intervention - MS & 6-12	Title I	New	0
Instructional Technologist (Verizon)	Title I - Partial	Current	0
	GF/ESSER	New	2
IT Customer Service Reps.			
Wraparound Specialists	GF	Current	2

Notes:
 1. Current personnel includes PUA, A180, and one-time funded positions
 2. Magnet and Title I positions on page 2 must be paid for from FY23 allocation

Campus Allocations

- Visit www.houstonisd.org/strategicplan to see the allocation for every campus in HISD.

FINANCIAL UPDATES

FY 23 Budget

	FY23 Latest Thinking Forecast as of 3/3/2022	Headquarters Cost Take Out	Increased Vacancy Rate	FY23 Latest Thinking Forecast as of 3/31/2022
<i>\$ in millions</i>				
Total Estimated Revenues	1,852	-	-	1,852
Total Estimated Expenditures	(2,047)	60	30	(1,957)
Operating Surplus (Deficit)	<u>\$ (196)</u>	<u>\$ 60</u>	<u>\$ 30</u>	<u>\$ (106)</u>

Other Potential Adjustments include:

- **Enrollment changes:** \$8M for every 1,000 students



Key Assumptions:

1. Revenues and appropriations shown net recapture of \$256 million.
2. Total Estimated Expenditures is appropriations adjusted for *estimated* fallout.
3. Assumes estimated cost of compensation plan and healthcare cost increase.

FY 23 Budget: Use of Funds

ESSER Indirect Costs (IDC) One-Time Funds

Available Fund Balance

\$ in millions

**FY23 Latest
Thinking
Forecast**

ESSER IDC One-Time Funds Summary

Beginning Balance	\$ 130
Use of ESSER IDC Funds	(50)
Ending Balance	\$ 80

\$ in millions

**FY23 Latest
Thinking
Forecast**

Available Fund Balance

Beginning Balance	\$ 243
Decrease (Increase) in HISD Board Reserve	(19)
Budget Surplus (Deficit)	(56)
Ending Balance	\$ 169

Use of Sources to Fund the Operating Deficit:

$$\rightarrow (\$50) + (\$56) = (\$106) \leftarrow$$

Note: Changes in FY22 revenues based on State Hold Harmless, or changes in year-end fallout may materially change beginning balance.

Key Financial Takeaways

- Without making any changes to the way we currently operate, the estimated budget deficit for 2022-2023 is \$109M
- With implementation of the strategic plan, the estimated budget deficit decreases by \$3M to \$106M currently included in the latest thinking forecast.
 - \$83M of this is attributed to compensation increase
 - \$60M in savings due to central office cuts
 - \$26M cost savings due to reduce costs of the hybrid model
- For the short-term, the district will cover the \$106M budget deficit through a combination of fund balance and ESSER indirect funds.
 - \$56M in fund balance
 - \$50M in ESSER indirect costs
- With implementation of the strategic plan, the amount of funding allocated to campus-level expenditures in 2022-2023 will increase by \$107M.
 - \$30M in General Funds
 - \$27M in Title I Funds
 - \$50M in ESSER funds
- The district will convene a committee in summer 2022 to examine the best ways to address the structural deficit and make recommendations to the Superintendent and Board to act on in spring 2023. An outside school restructuring study will also be conducted.

Strategic Plan Town Hall Series

01

Building Trust and
Reliability for Our
Families and
Community

02

Providing
Equitable
Opportunities
and Resources
at Every School

03

Ensuring Great
Schools and
Programs in
Every
Community

04

Promoting High-
Quality Teaching
and Learning

05

Delivering
Effective Services
and Supports to
Students with
Exceptional
Needs

06

Cultivating
World-Class
Talent at
All-Levels

Looking Ahead

- **Budget Workshop #4**
 - **Thursday, April 7, 2:00 P.M.**