

Goal Setting and Strategic Budgeting for FY 26

Summer Institute
July 12, 2024

What We Will Cover:

- ❑ Why We Set Goals
- ❑ Developing Goals
- ❑ Implementing and Monitoring
- ❑ Moving into Budgeting
- ❑ Making Tough Choices
- ❑ What Do We Know on FY26 and
When

Why Set Goals?

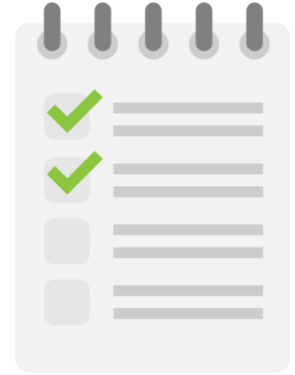


- Keep your Committee on Track
- Align the Committee with the Superintendent
- Align the Committee and Superintendent with the District
- Lets stakeholders know your District is functional
- If you don't do it, someone else will!

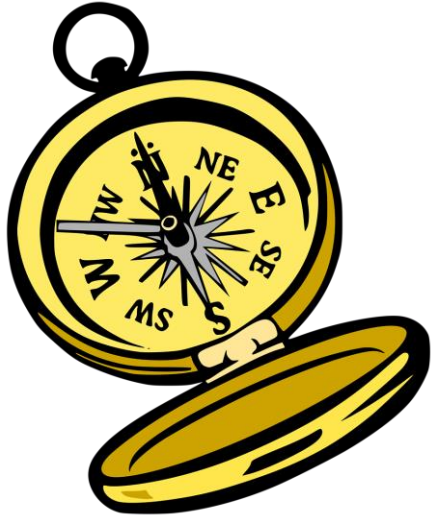
Where Do We Start?

Start With a Review of Your:

- Self Evaluation
- Superintendent's Evaluation
- Strategic/District Improvement Plan
- Mission/Vision/Core Values
- Portrait of a Graduate



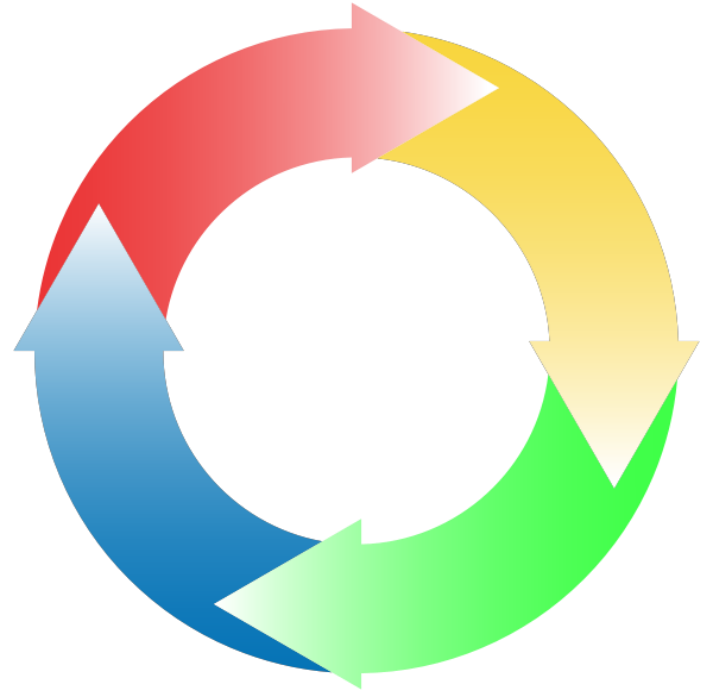
What Do We Do With All That Data?



- ❑ Meet as a Committee WITH your Superintendent
- ❑ Align to the Superintendent Evaluation Cycle
- ❑ Vote to Adopt the Goals
- ❑ Set Operating Protocols
- ❑ Create a Year Long Agenda

Ok, Now What?

- ❑ Monitor
- ❑ Review
- ❑ Reset
- ❑ Repeat
- ❑ Here are some examples:




Q Search Agenda

1. Meeting Opening

- A. Roll Call
- B. Public Comments on the Agenda (approx. 7:05 pm)


2. Recognitions and Achievements

- A. Recognition of MPY Poster Project Winners
- B. Student/Athlete/Employee of the Month Recognitions 
- C. Student Representative Report

3. Consent Agenda

- A. Review of the February 2024 Accounts Payable and Payroll Warrant reports 

4. Action Items



- A. Minutes of the Working Session on the FY25 Budget of January 30, 2024.**
- B. Minutes of the Public Hearing on the FY25 Budget of February 6, 2024.
- C. Minutes of Regular School Committee Meeting of February 6, 2024.
- D. Approval of Items over \$50,000
- E. Approval of Update to Admissions Policy 2024-2025 JF (added to agenda unanticipated 48 hours, 3/12/24 at 11:10 am) 

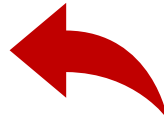
5. Principal's Report

- A. Cluster Chair Presentation
- B. SkillsUSA District Competition Kick Off



Agenda Item Details

Meeting	Mar 12, 2024 - School Committee Meeting at 7:00 PM - (posted on 3/8/24 at 5:15 PM)
Category	Action Items
Subject	Minutes of the Working Session on the FY25 Budget of January 30, 2024.
Access	Public
Type	Action, Minutes
Recommended Action	Move to approve the minutes of the Working Session on the FY25 Budget of January 30, 2024
Minutes	 View Minutes for Jan 30, 2024 - Working Session on the Budget 7:00PM (posted on 1.
Goals	 District Strategy Strategic Objective 3: Supporting Operational Effectiveness




Public Content

Administrative Content

Executive Content

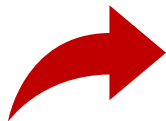
Motion & Voting

 Move to approve the minutes of the Working Session on the FY25 Budget of January 30, 2024

Motion by Karen Chapman - Townsend, second by Chris Prehl - Ayer.
Final Resolution: Motion Carries
Yea: Brian Fulmer - Shirley, Chris Prehl - Ayer, Lawrence MacDonald - Chelmsford, Robert Flynn - Groton, Samuel Poulsen - Chelmsford, Sheldon Chapman - Townsend, Alicia Mallon - Westford, Karen Chapman - Townsend, Charlie Ellis - Littleton, Pat Wojtas - Chelmsford, Paula Baldassari - Peppercorn

Linking agenda items to Superintendent/Committee goals keeps everyone focused and makes evaluations easier.

SMART goals with clearly defined actions are more effective.



School Committee Goals and Action Steps

Duty to Govern Established Policies and Oversee, Evaluate, and Monitor the Execution of Policies

By June 30th, 2024, the School Committee will conduct a review and update school committee policies that support the district plans to provide educational programming to be sure they are up-to-date and in compliance with state/ federal law and regulations. This goal will be measured by the changes made in identified policies and the clear communication of changes to the school community.

Action Steps:

1. The SC Policy Subcommittee shall continue to convene and review current policies and recommend adjustments/updates with appropriate central office staff.
2. Identify the policies that will be reviewed and adjusted
3. Publish final changes and communicate how the changes apply to the school community.

School Committee Goals and Action Steps (cont.)

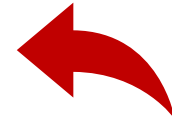
Committee Support of District Wide Efforts to Increase and Improve Communication

By June 30th, 2024, the School Committee will have developed and implemented a proactive communication plan that celebrates the successes of the district and that regularly updates the public regarding the district's challenges as measured by agenda items, meeting minutes and increased attendance of all committee members at district events.

Action Steps:

1. Through the Superintendent, collaborate on, and create, a platform for information sharing by November 1, 2023.
2. Through the Superintendent, identify the events and activities which prompt School Committee presence during the school year.
3. Individual members of the SC will consistently share updates and information on the subcommittees, advisory committees, and other relevant groups they are assigned to or involved with.

(5.25.16)	Agenda Item	Time Alloc.	Category	Action***
11-Jan	Inauguration and Swearing In of City of Melrose Officials	1.5 hrs	Joint	As noted in program
12-Jan	6:45 HS Students 7:00 Formal Election of SC Chair/Vice-Chair School Committee Spotlight - Lincoln School MS School Choice Technology Plan Minutes/Fld Trips/Maint/Personnel/Budget Summary/Warrants BOY Subcommittee Statements Special Education Staff MHS Past (< 2 yrs.) Class Funds Policy Subcommittee Assignments and Liaison Positions SC Norms Liaison Reports Action Item Progress Report	15 Chair 5 Supt 10 Supt 5 Supt 5 Supt 5 Consent 15 Each 5 EPP 5 FF 5 PP 5 Chair 30 Chair 5 Chair 10 Chair	Meeting As required in By-Laws One school each month Vote on Public Hearing Report: rollout Vote Report: subcomm plans for the year Vote Report: review of process Vote: 1st reading Announce subcomms/vote liaison positions Facilitation by D. Presser (MASC) Report: member participation Report: progress, etc.	
26-Jan	6:00 ES - Deployment of Security 7:00 SEEM Annual Report Minutes/Warrants/Revolving Accts/Policy (2nd Rdg) BOY EP&P Subcommittee statement MHS - Tuition based Foreign Students FY17 Budget Message FY16 Mid-Year Budget Update Rolling Agenda Liaison Assignments Proposed Revised Norms Committee Calendar: Add EP&P Subcomm+Mar/Apr Budget Mtgs. Liaison Reports	55 Chair 10 Supt 5 Consent 5 EPP 15 EPP 30 FF 5 FF 5 Chair 5 Chair 10 Chair 5 Chair 5 Chair	xxx Report Vote Report: EP&P subcomm's 2016 plans Report: (spkrs) Report: per Budget Timeline Vote Report Report Vote Vote Report: member participation	
9-Feb	7:00 MVMMS School Choice School Committee Spotlight - Roosevelt School Minutes/Field Trips/Cafeteria/Personnel/Budget Summ/Warrants School Business Official Position OCR Compliance Campus Kids Fees Updated Budget Timeline Committee Calendar: Add EP&P Meetings Proposed Revised Norms Liaison Reports Action Item Progress Report including Glossary ES: Discuss Strategy with Respect to Collective Bargaining ES: Minutes of 12/8 & 1/26 Meetings	15 Chair 10 Supt 5 Consent 10 EPP 10 EPP 15 FF 10 FF 5 Chair 15 Chair 5 Chair 5 Chair 10 Chair 5 Chair	Public Hearing One school each month (spkrs) Vote Report: process and timeline Report: training, etc. Vote (spkr) Report: discussion dates/topics Vote Vote Report: member participation Report: progress, etc. xx Vote	



**Clearly defined actions on
agendas help stakeholders
know what is informational
and
what requires committee votes.**



Translating Into Dollars and Cents



- ❑ Where is the District on implementation of your goals and plans?
- ❑ What is needed in order to continue to move forward?

Making the Tough Choices

- ❑ When there needs to be a trade-off, consider what is not in line with your goals.
- ❑ What is most valued? What is valued less?
- ❑ Be creditable and share real data.



What Do We Know on FY26?

- ❑ Fifth year of implementation of the Student Opportunity Act
- ❑ Contractual obligations
- ❑ Projections of other cost centers



What Don't We Know on FY26?

- ❑ Inflation rate* (can be calculated this fall)
- ❑ Enrollment (October 1)
- ❑ Local Contribution % (maybe - January 2025)
- ❑ Municipal Revenue Growth Factor (January 2025)



*be sure you've reviewed MassBudget's recent report on this!

Budget Related Things to Include in Your Year Long Agenda:

Your district's budget adoption timeline

- Relevant subcommittee meetings
- Town meetings
- Regional agreements
- City/town election cycles

Preliminary budget presentation

- Link to goals

Quarterly reports, approximately:

- September, January, April, June

Fee and salary schedule approvals

August

- District-Wide Goals, first reading
- K-12 School Improvement Plans
- Adoption of handbooks
- Appointment of Delegate and Alternate to MASC Annual Business Meeting
- Approval of Home School Proposals
- Release of Executive Session Minutes

September

- Introduce new administrator staff
- Opening of Schools Report
- Review of Summer Programs
- Review of Summer Professional Development
- Student Services Update
- Adoption of District Goals
- Adoption of K-12 School Improvement Plans
- Approval of Home School Proposals

October

- MASS Certificate(s) of Academic Excellence
- October 1 Enrollment Report
- Superintendent presents Professional Practice Goal
- Presentation of Curriculum & Instruction Priorities
- Presentation of Student Achievement Data

November

- DanversCARES update
- Town of Danvers Budget Policy/Timeline
- Annual review of Safety policies

December

- Student Services Update
- Educator Evaluation System/PARCC/DDMS
- Annual Evaluation of Superintendent
- Danvers High School Program of Studies, first reading
- Wellness update

Massachusetts Association of School Committees

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