

. (See Memorandum attached.) That recommendation was not taken. We repeat this recommendation as generally sound, but we could await full implementation while pandemic economics settle.

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Superintendent as part of our end of year report.

The BAC spends the first part of its school year preparing to review a budget and the second part in concentrated review of the budget. With five of our fifteen members newly appointed, we organized a careful course for preparation to review the Budget that would come at the end of February. We commenced a tutorial covering three monthly meetings and conducted by Leslie Peterson (Assistant Superintendent for Finance and Management Services and our Staff Liaison) on the construction and content of the Budget Document, as well as the relevant resources available online. In retrospect, this mostly prepared us to review budgets like the last several

At our January meeting, the BAC further learned from Leslie Peterson (APS) about the recent history of cost-of-living increases and step increases. We also received the union perspective on the same from Josh Folb from the Arlington Education Association. Compensation represents 78% of the operating budget. The BAC believes the compensation study will provide valuable perspectives and insights to aid decisions on salary adjustments, pay scale reformation, and the competitive condition of APS in the Northern Virginia area.

In December Robert Ruiz presented a briefing based on updated methodology for enrollment projections. The BAC learned that new projections show 3,200 fewer students than previously expected will be enrolled in APS by 2028. This good news will provide considerable relief to the Capital Improvement Plan and bond funding demands in the next several years.

For a second consecutive year, the BAC invited Kristen Haldeman to present the status of multi-modal transportation planning and initiatives. Noting that transportation and system, we have been very supportive of her novel strategies to leverage both APS and community resources to solve transportation problems.

The BAC was asked to provide comments on the Proposed Equity Policy, which are exhibited here as another attachment.

Further, we dedicated our February meeting to receiving a presentation from former School Board Member Abby Raphael entitled newly arrived APS Chief Diversity, Equity and Inclusion Officer.

For the past several years, increasing issues with equity implications have arisen for the school system to tackle. Drafting an Equity Policy and hiring a Chief Equity Officer are solid actions in

presentation to aid School Board decision-making. An Advisory Committee can be built. If it is not already, this should be a cross-disciplinary, multi sector body, with community, health, education, religious, police and other third-party provider stakeholders. We believe such a broad-based group can help the school system discern a path toward better budget and other program decisions.

Our March 4 meeting was our only discussion of it before it had to be abandoned. Our meetings of March 18 and April 15 were cancelled in compliance with government orders and quarantine procedure.

A Revised Budget Proposal was issued April 17 and the BAC scrambled to offer comments via a few charts submitted to the School Board during a two-minute public comment period. The comment charts are attached.

1. Reform the Operating Budget Process

The proposed Budget is prepared by APS staff under strict secrecy and released to the School Board and the Arlington public on a planned date in late February. There is no statute, policy, or implementation procedure that dictates such secrecy. The BAC presumes that this practice is established so the school

(e.g, transportation, energy, planning factors, options programs, etc.), bringing these issues fully into public view, and enabling APS staff, the Board, and community members to engage in robust dialog about what is important to our community and what we can afford before the hard decisions need to be made. This is where the BAC could make a significant contribution.

2. Presentation of Budget Documentation

of budget actions (likely due to its multitude of authors) where a proposed budget cut is sometimes articulated with words of support for the cut and sometimes worded in terms that argue against the cut. In reality, there are usually arguments both for and against such an action, but only one gets put into the document. Both sides of a proposition should be considered before an action is taken, and it will be a service to the School Board to present both sides in budget documentation.

The BAC therefore recommends a

because no budget action should be contemplated without being data-driven and benefitting from a reasonable degree of data analysis. A mockup of this format is attached to give visual substance to this recommendation

The BAC continues to endorse the sentiment of recent Budget Directions that instruct the Board to base budget decisions on data and to present both sides of a proposition. The BAC would prefer that this be better articulated as an instruction to

will exacerbate these projected deficits. In 2019, the Arlington County Board approved a 2-cent tax increase, three quarters of which went to the school budget to fill the then-forecasted deficit

describe how it partners directly with Fairfax County and Loudoun County schools for Family

so much about the budget, and arranged for others in the staff (named herein) to join our meetings and teach us about school division operations.

Finally, we want to thank _____ and _____, who are departing after six years on the BAC. They have both become exceedingly knowledgeable about the operations of the school district and our budget, and have consistently provided the sound advice and valuable insight. They will be sorely missed.

2019 - 2020 BAC Members and Colleagues

Memorandum October 3, 2019 RE: FY2021 Budget Direction, Five-Year Forecast

Memorandum October 30, 2019 RE: BAC Comments on Proposed Equity Policy

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Proposed Budget

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Mockup of Budget Action Presentation

MEMORANDUM

DATE: October 3, 2019
TO: APS School Board Members
FROM: Chair of the APS Budget Advisory Council, Robert Ramsey
RE: FY2021 Budget Direction

One purpose for the Budget Advisory Council (BAC) provided by the current APS Policy B-3.6.33 before the Board gives its annual budget direction to the Superintendent and at other times as a

MEMORANDUM

Budget Advisory Council
 Comments on the
 Revised Proposed Budget
 April 21, 2020

Bob Ramsey, Chair

Melanie Bowen, Vice-Chair	Cecilia Ciepiela-Kaelin, Past Chair
Lida Anestidou, 6-yr Term	Heather Jones, 6-yr Term
Lisa Blackwell	Juan Gordon
Wei Chen	Sheila Leonard
Katherine Christensen	Chuck Rush
Dedra Curteman	Erik Sullivan
Christina Diaz Torres	Jennifer Wagener, 3-term Secretary!

Leslie Peterson, Staff Liaison

Support Balanced Scenario 3

(No Compensation with Expenditure and Revenue Closures)

Compensation Scenarios 2 and 1

Scenario 3 is well-
 circumstances; some comments in later charts

Conceivable that economy will not remain in current condition and an

Some Comments

Compensation and Budget Studies were the subject of specific 2020 Budget line item attention and should not be cut

(frankly, should have received more aggressive staff action during the past year)

Partnership Coordinator position was also given specific 2020 Budget attention

Too much potential to reap greater bang for the buck from working with community

Vision is for partnerships with NVCC and GMU, leveraging both their and APS facilities

Seek delay and/or stretch implementation of the DoJ Settlement

Seems to be both expensive to the school division and of debatable efficiency

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- o implement the Department of Justice Settlement Agreement, including but not limited to phasing in over three to five years those recommendations with budget implications.

Explore long-term collaboration with the County for cost efficiencies on facilities, services, and service fees.

Explore partnerships with community organizations, such as Northern Virginia area educational institutions, for cost efficiencies, such as collaboration with facilities, and services.

Explore increases in revenue, including a review of all APS fees.

Consider recommendations from previous citizen advisory committee reports, program evaluations, internal audits, and other relevant reports.

Consider reserve funds for one-time costs in FY2022 in accordance with School Board practice.

Provide five-year forecasts of revenues and expenditures to gauge long-term financial sustainability.

Ensure that APS complies with all federal, state and local laws.

Arguments in Favor

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