

# FCSC Project Charter: Budget Reduction

**Project Name:** Budget Reduction  
**Project Sponsor:** David Clendening  
**Project Leader:** Jeff Mercer

**Date:** Sept. 15, 2009

**Program Owner:** Jeff Mercer

## Problem Statement(s)

The general fund operating balance has declined each year for the past nine years. There is a projected budget shortfall of \$1,450,000 in 2010, and left unchecked the resulting deficit will place the Franklin Community School Corporation perilously close to a zero operating balance by December 2010.

## Goal Statement(s)

By December, 2009 the newly created Finance Advisory Committee will provide a recommendation to the Superintendent, and subsequently to the Board of School Trustees for approval of budget reductions in the general fund in the amount of \$1,450,000 in the 2010 calendar year.

## Business or Educational Impact

- General fund will achieve a balanced budget status.
- The general fund operating balance will begin to grow to the desired 5%-7% range.
- By balancing the budget all new dollars can be more easily allocated to programs targeted as corporation priorities.
- Good stewardship of taxpayer dollars.
- Decreased pressure to deplete the corporation Rainy Day Fund

## Project Scope

A complete analysis of the General fund and subsequent budget reductions for 2010 in the amount of \$1,450,000.

## Project Timeline

- Project Kick-Off: September 10, 2009
- Committee led Data Collection November 24, 2009
- Analysis of Data December 4, 2009
- Present First Draft to School Board January 11, 2010
- Final School Board Approval February 8, 2010
- Control Plans and Communication February 16, 2010

## Team Selection

Project Leader: Jeff Mercer (Administrative/Parent)

Will Freeman (IT)

Mary Beth Hensley (Community/Parent)

Dale Ludwig (Teacher)

Vita Viviano (Teacher/Parent)

Craig McCaffrey (Principal)

Paige Banos (Community)

Doug Dickinson (Operations/Parent)

Jerry Wolford (Counselor)

Mark Heiden (Principal)

Christina Culp (FCSC Secretary/Parent)

Ryan Dunfee (Teacher)

Pam Millikan (Principal)

# Developing our Guiding Principles

## What are Guiding Principles?

The principles we select should reflect our beliefs about how the corporation prioritizes our investment in the educational process. The principles guide what we do, why we do it, and how we do it.

## Guiding Principles selected list and definitions:

1. **Financial solvency** – Ability to cover budgeted expenditures while adhering to all governmental compliance issues.
2. **Maintaining facilities** – Ability to provide for students and staff a safe, clean, and comfortable teaching and learning environment through reasonable and prudent operational upkeep.
3. **Student achievement** – Continued pursuit of our targeted academic objectives.
4. **Learning experiences which augment student achievement** – Opportunities from which students can grow that are outside of the typical academic experience.
5. **School/Community climate** – Ability to deliver an outstanding educational experience that will result in the collective vesting of all stakeholders united in a common cause.
6. **Positive work environment** – Recognition that in order to attain our student achievement objectives we must foster a work environment where members of the team are united in our pursuit to deliver educational excellence.

# Organizing our Process

## Identifying our budget reductions categorically:

1. Level 1 – Spending efficiencies by sub-group
2. Level 2 – Non-personnel reductions by sub-group
3. Level 3 – Personnel reductions by sub group

# Assigning our Sub-Groups and Collecting Data

\* Disaggregated data from Employee Survey and Community input along with Sub-Group suggestions were analyzed as identified below. Committee members then reviewed Sub-Group recommendations and voted to **Accept, Reject or Modify** each of the 81 items.

**Operations** – Grounds, custodial, maintenance (non-administrative personnel), utilities – electricity, gas, water and sewer, trash, pest control

**Certified educational framework** – Certified teachers, teaching supplies, professional development, etc.

**Non-Certified educational framework** – All building level support staff outside of the Operations group above (classroom assistants, secretary's, etc.)

**Administrative educational framework** – Central Office, department and building administrators, grants (Title), ECA



# Delivering the Committee Recommendations

## Steps involved in delivering the recommendation:

1. Recommendation document compiled and delivered to Dr. Clendening on December 18th
2. Meetings held to share recommendation findings with Board members, administrators, teachers and support staff representatives
3. Rough draft recommendation document presented at the January Board meeting
4. Community forums to be held on January 14<sup>th</sup> and 20<sup>th</sup>
5. Final recommendation approved at the February Board meeting