



Strategic Staffing and Budget Planning

Jeremy J. Batchelor
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The Presenter

- **YCSD Superintendent- 2023-present**
- **YCSD Chief of Staff/Deputy Superintendent -2020-2023**
- **East HS Principal (YCSD)- 2018-2020**
- **20 total years in administrative experience in urban, rural, and suburban districts**



Our Story

Recent History:

HB 70

HB 110


[Article on Legislation](#)




YCS D  **FACTS**



LEADERSHIP
Jeremy J. Batchelor,
Superintendent
Bryan Schiraldi,
Treasurer



ADDRESS
20 W. Wood St.
Youngstown, OH 44503-
1028 Phone (330) 744-6900


 Population 60,068


 84.5% of Population
Graduated High School

DISTRICT PROFILE
Youngstown City Schools is in Mahoning County. According to the United States Census Bureau, the estimated population of Youngstown as of 2020, was 60,068. Approximately 84.5 percent of the population graduated from high school. The median household income in Ohio is \$31,020.

 **OUR STUDENTS**
Enrollment - 4700
Attendance Rate -
84% Graduation Rate -
85% Number of Schools
- 14 including PK Center

 **OUR STRATEGIC EMPHASIS**
Governance
Diversity, Equity, and Inclusion
Community Partnerships
Talent and Leadership
Data and Accountability

 **OUR TEACHERS**
Attendance Rate - 92.1%
Average Salary - \$53,292
Salary Range - \$35,360 - \$78,782
Average Years of Experience - 11
Hold Advanced Degrees - 38.6%

 **OUR STAFF (# EMPLOYED)**
Administration - 74
Support Staff - 819
(full and part-time)
Teaching - 453

YOU Belong in Youngstown City School District—Welcome to the #YCSDFamily



The What?

eHCLE Domain:

Talent Acquisition

eHCLE Standards:

PP.1

Forecast talent needs and evaluate forces impacting talent availability to build a workforce plan.

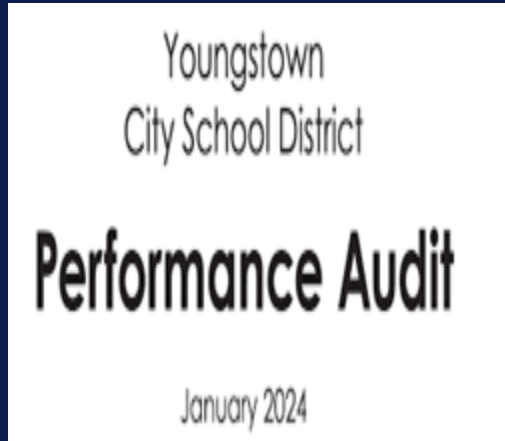
PP.4

Have a clearly defined position control process, aligned with organizational priorities, that is used to make staffing decisions.

Strategic Staffing and Budget Planning Tools to utilize in the Youngstown City School District. The Strategic Budgeting and Trade-off Decision Making Process Facilitation will be created and put into practice within the district. It will also create a financial modeling that will allow for enhanced forecasting. Based on strategic budgeting conversations with YCSD leadership and a school improvement partner, Project Evident a multi-year financial model will be created that will run financial scenarios for staffing and school budgets through formulas. Then potential funding and capacity limitations will be identified. This will allow the district to forecast the cost of strategies, programs, and/or interventions prioritized through continuous improvement efforts. From this, district and school budget allocations will be provided and drive staffing in the district. Additionally, a budget guide will be developed to assist district central office and principals in adequately and accurately staffing buildings and programs appropriate to the needs and strategies of the district. District Academic Improvement Plan goals will be met and the district will avoid any fiscal watch or emergency designation from the State of Ohio now and in the future by implementing this work with fidelity.



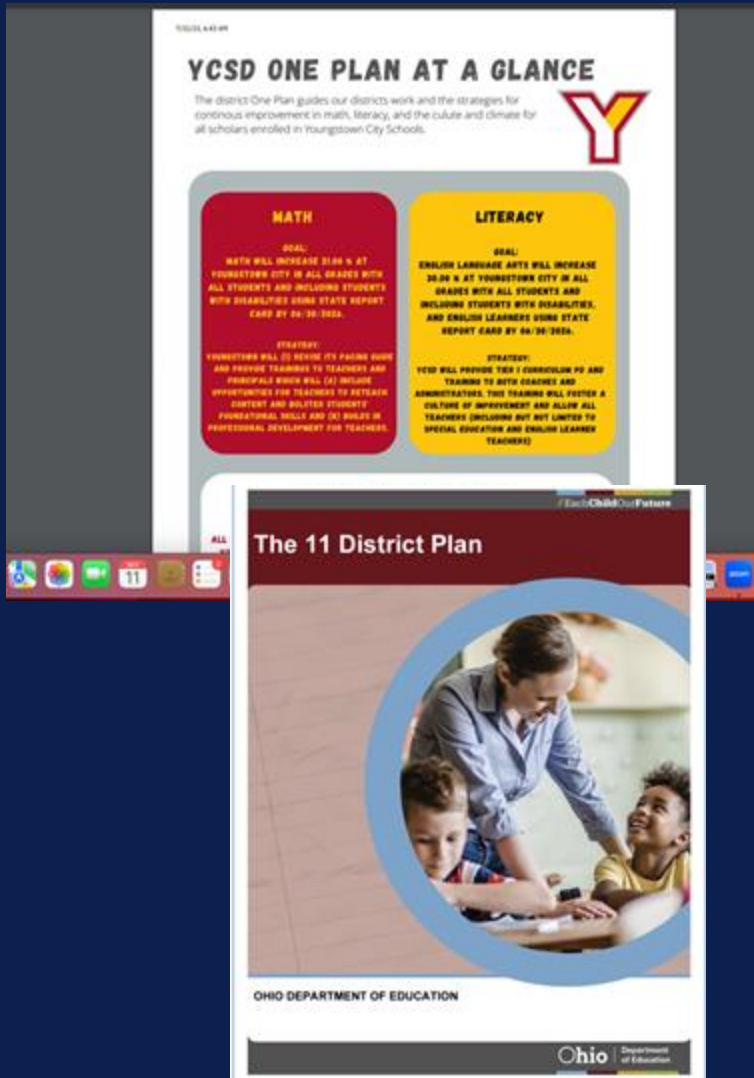
The Why?



- **The financial forecasts submitted in November of 2022, May of 2023, and November of 2023 as required by Ohio law, illustrate projected deficit spending and potential fund balance depletion by Fiscal Year 27 and a projected fund balance deficit of almost \$17 million dollars.**
- **District under HB 110 three year Academic Improvement Plan in order to retain local control**



The Why? (continued)

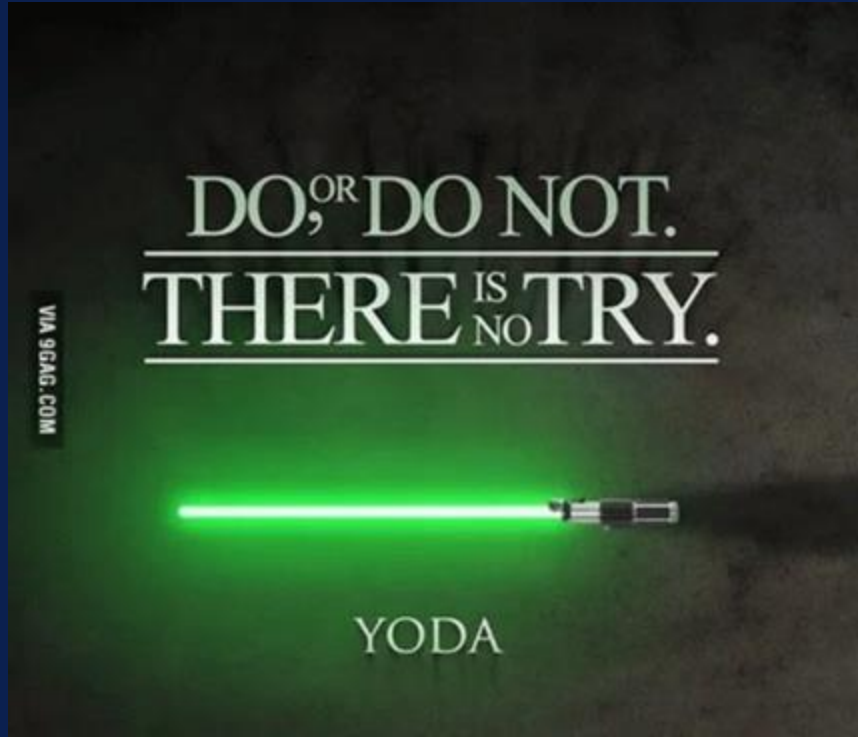


The district has numerous plans it must adhere to based on numerous reasons that all speak to the performance of the district and its impact on scholars.





Theory of Action



IF we create a strategic staffing and budgeting process for our district, THEN our district's staffing will be better aligned to our enrollment and budget forecast, allowing us to ensure we are using resources in ways that positively impact our continuous improvement efforts academically and fiscally, and THEN we will have a plan that can be utilized by districts with similar enrollment and academic needs.



The Approach



- Introduction to Project Evident at OAASFEP Fall Conference in 2022
- Past similar experiences
- Connect the work



The Approach: Our three-year vision for our budgeting process

SY 2023-2024

- Review our staffing allocations based on student enrollment
- Review student performance data and develop simulations to help inform trade off decisions

SY 2024-2025

- Develop a budgeting process and calendar.
- *Develop / finalize a student funding formula for general and grant funds*
- *Create & publish the guide to school budgets*
- Train central office and school leaders on the budgeting process
- Develop a school-level budgeting process
- Engage principals in a budget process with financial guardrails.
- Central Office departments will also engage in its own budget review

SY 2025-2026

- Principals are engaged in the school-budgeting process that is informed by student performance.
- Central office are engaged in the school budgeting process and uses student performance data to inform resource allocation decisions.



The guiding values that will inform our budget

Values	Description & Implications
Student Achievement	<ul style="list-style-type: none">• Description: While we have focus areas each year, we are trying to improve student performance across grades K-12.• Implications: There will be a “baseline” level of funding for K-12, but for our areas of focus during a particular year, we will allocate more of our funding and time (e.g., resources) to accelerate improvement in those areas.
Equitable Staffing	<ul style="list-style-type: none">• Description: We will ensure that all schools have equal level of staffing based on student enrollment and will prioritize our hiring and placement efforts based on student needs.• Implications:<ul style="list-style-type: none">○ We will have a baseline staffing model for each school based on student enrollment, additional positions will be based on student need and our instructional design.○ We will prioritize our staffing decisions as follows: core vacancies are filled before other academic positions; lower performing schools filled before other schools (students who need more get more)
Fiscal Accountability	<ul style="list-style-type: none">• Description: We will ensure a balanced budget that is aligned to our priorities AND the strategic use of resources will be the shared responsibility across our staff (central office and principals).• Implications: We will develop a consistent allocation formula for select set of funding streams (e.g., general funds, Title I, and IDEA), provide resources to ensure clear guidance, and build our central office and school leaders’ capacity to use evidence in their resource allocation decisions and hold them accountable for student outcomes.



Example of Priorities: SY24-25 Priorities

Academic Improvements

- Early Literacy (K-1)
- K-5 Math
- **6-8 Math**
- Algebra I
- K-5 Attendance
- 6-8 Attendance
- 9-12 Attendance

Process Improvements

- MTSS Implementation
- Specialized Services Improvement
- Improved data routines and data use as part of our OIP process

Student & Staff Experience

- Students have rosters by the end of the year for the next school year
- Principals have an academic and PD calendar by May
- Summer school programming is completed by February to ensure appropriate staffing for programs
- Schools have staffing plans by March 2025 and spending plans by June, ensure that students will have teachers & the resources they need when they enter the classroom.



Goals of the Project

Goal 1: By Fall of 2024, we will complete the development of a budgeting process and train central office and school leaders on the budgeting process.

Summative Metric: Accurate staffing aligned to district academic improvement goals where all schools are staffed equitably as measured by the district One Plan at a 90% rate (leaving room for superintendent/board discretionary positions for extraneous circumstances).

Goal 2 : By May of 2024, we will complete and implement a staffing funding formula for general and grant funds that will be evidenced by each school's FTE (full time teaching equivalency) staffing aligning to its allocated budget. (Education Management Information System (EMIS) reports will show this as will budget reports).

Summative Metric: Decrease the overstaffing in schools (cost savings of 5% per school)



Ratios

- **Principals:** 1 per school
- **APs*:** 1 (not mandatory)
- **Deans*:** 500+ = 1 (not mandatory)
- **Teachers:** Student-level enrollment by grade level (and add'l if needed to meet grad requirements)
- **Counselors:** 1:250 (500 mandatory); *min 1 each school with a counselor (round to whole)*
- **Attendance EA*:** 1:500 (1 min per school)
- **Intervention Specialists:** 1:16 (ES); 1:16 (MS/HS) →
- **Social Workers:** 0.5 min; 500+ = 1
- **Secretaries:** min 1 in each school; 500+ students = 2
- **Instructional Coach*:** 0-500 = .5; 500+ = 1
- **Note: WE COULD BE EVEN LOWER, BUT THESE ARE DISTRICT DECISIONS BASED ON OUR DISTRICT DATA PROTOCOLS AND NEEDS TO ACHIEVE OUR GOALS**





**SY25-26 Budget Timeline &
Budgeting Process**



Central Office & School Processes

- **Central Office (almost-full autonomy)**
 - Senior Leader/Department Heads will receive a \$ allocation and information about current staff structure; for the most part, it is their decision on how you want to spend it – staffing, materials & supplies, PD, etc., to fulfill the obligations of their department.
 - Funding for specific investments, e.g., curriculum adoption, cannot be traded in.
 - Any requests for additional funding beyond your allocation must be submitted as a written request. Form & guidance are forthcoming.
- **Schools (partial autonomy)**
 - We will provide the core staffing structure for a school with some discretionary funds using our general funds. They will have some autonomy over the discretionary funds.
 - They will have full autonomy over their federal funding, we will be transparent about the formula and the positions that have been purchased for their schools using the funding, but the decision to keep or trade-in the position will be theirs.

Results



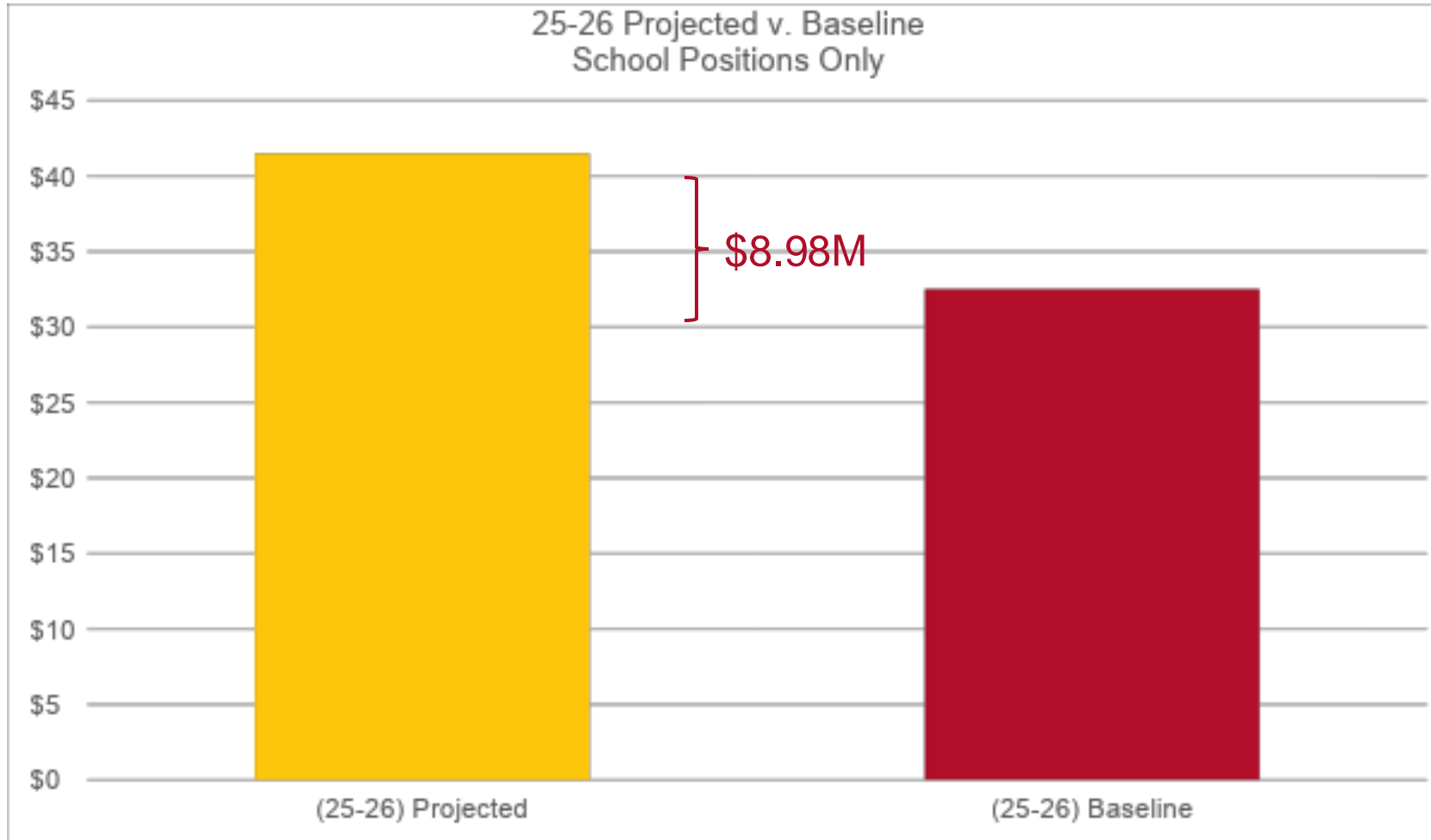
What successes have we seen?

- Budget Management: Successfully ending the year with a budget surplus demonstrates effective financial management and strategic allocation of resources.
- Alignment with District Goals: We have been able to tie budget planning directly to key goals, such as the development of MTSS and improvements in student growth support and curriculum adoption.
- Team Development: The leadership team is gaining confidence in using resource allocation as a tool for driving academic outcomes and operational efficiency. There's growing buy-in around the budget planning processes, especially the 80% spending target by October.
- Operational Efficiency: We have refined the OIP process alignment to better support budgeting decisions at the school level.
- **Salary and Benefits reduced by (1,568,020) from FY23 to FY24, projections are in line for a similar or increased reduction for FY25 (3.3% reduction in Year 1 where we were just building the process out),**





Meeting the projected service ratios will cost YCSD an additional ~\$9M.



Results



"I CAN HONESTLY SAY THAT I WAS INITIALLY CONCERNED WHEN I HEARD ABOUT THE PLAN FOR REALLOCATING STAFF, BUT I MUST ADMIT THAT THE PROCESS HAS FORCED MYSELF TO MAKE SURE THAT I AM STRATEGICALLY UTILIZING MY STAFF IN A WAY THAT MAXIMIZES OUR EFFICIENCY IN THE BUILDING. IN A DISTRICT WHERE WE HAVE A LOT OF RESOURCES AND I THINK OVER TIME THEY HAVE BEEN MISUSED, THIS FORCES THOSE IN LEADERSHIP TO MAKE SURE THEY ARE UTILIZING EVERY STAFF MEMBER IN THE MOST EFFICIENT WAY POSSIBLE." MICHAEL SAUNER, CHANEY MS PRINCIPAL

Our work in strategic resource allocation and budgeting has proven to be a game changer...the work we've engaged in has truly opened my mind to continually evaluating, considering, and making every decision based upon our core values and goals while continually considering the future of our district. Our work continues to reinforce that a strong and prioritized strategic budget truly is the key to long term success of any organization.- Aaron Bouie, III, Chief Academic Officer





Resources

[Relevant Legislation Information](#)

[Performance Audit Highlights](#)

[Performance Audit and District Response](#)

[Ratio Worksheet](#)

[Five Year Forecasts](#)

[Performance Audit](#)

[Project Evident](#)

[CO Budget Process Forms](#)

[Spring 2025 Survey](#)