

Knox County Schools

Spending Money Smartly – Resource Alignment Initiative in Collaboration with the Bill and Melinda Gates Foundation

List of Major Deliverables by Month (July 2013 – October 2014),

Outcome	July 2013	August 2013	September 2013	October 2013	November 2013	December 2013
Outcome 1: <i>Knox County Schools adopts a 2014-15 budget that reflects significant steps to align resources needed to implement the instructional strategies desired by the KCS leadership</i>	1. Preliminary district financial summaries (analysis of operating expenditures across coded account categories) 2. Stakeholder engagement plan 3. Creation of simple website to share progress updates (Strategic Plan and Resource Alignment work) and an email hotline for collecting input	1. Overall district financial summaries (spending and staffing patterns across ERS coded categories), including benchmarking against other districts (e.g., central office spend, etc.) 2. Analysis of how elementary schools use resources to serve student needs (e.g., by instructional model of service) 3. Per pupil financial summary (equity by student type and equity by school) 4. Finalized time audit survey	1. Preliminary themes from stakeholder engagement to date 2. Time audit survey results 3. Presentation created for “change management” meetings with stakeholders (format of meeting, key topics for discussion, supporting analysis) 4. Assessment of existing personalized learning models (benefits, fit with Knox, cost implications)	1. Additional themes from stakeholder engagement to date 2. ROI analysis results (where data was available to calculate ROI) 3. Presentation for “change management” meetings with stakeholders modified as appropriate based on initial meetings 4. Summary assessment of KCS’ current capabilities in personalized learning and potential gaps	1. Additional themes from stakeholder engagement to date 2. Analysis of how secondary schools use resources to serve student needs (e.g., by instructional model of service) 3. Identification of areas which receive additional investment vs. are deprioritized/ discontinued	1. Additional themes from stakeholder engagement to date 2. Draft recommendations for inclusion in preliminary 2014-15 budget (investment priorities and resource alignment opportunities that will be reflected in 2014-15 budget)
Outcome 2: <i>Knox County Schools develops a 3- to 5-year strategic finance plan that incorporates the district's programmatic priorities, the cost of implementing these priorities, and has a clear implementation plan to achieve these priorities within a 5-year timeframe (including key activities and activity owners).</i>			5. Initial prioritization of resource alignment opportunities based on analysis conducted to date (financial, student performance, time audit)	5. Prioritization of resource alignment opportunities updated to reflect ROI analysis	4. Estimate of costs associated with rolling out a personalized learning strategy across the district over the next 5 years 5. Summary of all cost implications of any other recommended changes (besides personalized learning)	3. "Phasing" plan for the resource alignment opportunities (when each opportunity will be addressed in the 5-year plan) 4. Draft outline of 5-year finance plan that includes: phasing of the resource alignment opportunities, associated costs, and implied implementation plan (high-level)
Outcome 3: <i>The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.</i>	4. Summary organizational themes from leadership/ management interviews 5. Overview of current planning and budgetary processes, with pain points identified 6. “Pulse survey” template (leadership attitudes toward resource allocation work, level of understanding of what needs to be done, and perceptions of individual and team ability to get the work done)	5. “Pulse” survey results from July 6. Summary of potential staffing needs (short-term and longer-term) 7. KCS capacity-building plan	6. Identification of any of data items, through the ERS Strategic Mapping Process, that should be retagged (using standard ERS coding) to enable comparable analysis in future years	6. “Pulse” survey results from September and potential impact on capacity-building plan 7. Identification of priority metrics that will be tracked annually to inform resource alignment over time 8. Preliminary recommendations re: changes to existing planning/ budgetary processes	6. Summary documents that outline approaches/ methodologies of various analyses conducted throughout the project 7. Refined recommendations re: changes to existing planning/ budgetary processes (after vetting with leadership)	5. Analyses (data files) and methodology summaries handed off to the KCS 6. Training delivered to targeted number of designated KCS staff on analyses and methodologies 7. Draft job descriptions for any new staff positions 8. Redesigned processes

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Outcome	January 2014	February 2014	March 2014	April 2014	May 2014	June 2014
Outcome 1: <i>Knox County Schools adopts a 2014-15 budget that reflects significant steps to align resources needed to implement the instructional strategies desired by the KCS leadership</i>	1. Strategic Plan outline reflects core district priorities that are driving the 2014-15 budget recommendations and the 5-year finance plan 2. Themes from ongoing stakeholder engagement	1. State of the Schools Address reflects that are driving the 2014-15 budget recommendations and the 5-year finance plan 2. Strategic Plan full draft 3. Themes from ongoing stakeholder engagement	1. Strategic Plan incorporating core district priorities finalized and shared with the Board of Education 2. Draft 2014-15 budget submitted to the Board (incorporates a substantial portion of resource alignment opportunities identified through analyses and stakeholder engagement)	1. Strategic plan adopted by the Board 2. Draft 2014-15 budget proposal approved by the Board and submitted to the County Mayor	1. Identification of potential revisions to KCS proposed budget (resulting from County Commission review and public budget hearings) 2. Impact of these revisions on the overall resource alignment plan for 2014-15	1. KCS 2014-15 budget approved as part of the county-wide budget and capital plan
Outcome 2: <i>Knox County Schools develops a 3- to 5-year strategic finance plan that incorporates the district's programmatic priorities, the cost of implementing these priorities, and has a clear implementation plan to achieve these priorities within a 5-year timeframe (including key activities and activity owners).</i>			3. Stakeholder engagement plan for “Phase 2” (implementation planning)	3. Updates from implementation planning process	3. Draft implementation plan (to execute Strategic Plan and 5-year Strategic Finance Plan)	2. Finalized Implementation plan finalized based on stakeholder engagement process (with greater level of detail for 2014-15 and lower level of detail for the years beyond 2014-15) 3. Finalized 5-year strategic finance plan resource alignment roadmap, costs, implementation plan and owners
Outcome 3: <i>The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.</i>	3. December “pulse” survey results and potential impact on overall capacity-building plan and process design 4. Training of designated KCS staff on tools/methodologies (as needed)	4. Training of designated KCS staff on tools/methodologies (as needed)	4. Training of designated KCS staff on tools/methodologies (as needed)	4. March “pulse” survey results and potential impact on overall capacity-building plan and on process design 5. Training of designated KCS staff on tools/methodologies (as needed)	4. Training of designated KCS staff on tools/methodologies (as needed) 5. Finalized job descriptions for any incremental staff who will be hired in the new fiscal year (2014-15)	4. Training of designated KCS staff on tools/methodologies (as needed) 5. Posting of job descriptions for any new positions 6. Changes previously proposed to existing processes (planning, budgetary) adopted for fiscal year 2014-15

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Outcome	July 2014	August 2014	September 2014	October 2014
Outcome 1: <i>Knox County Schools adopts a 2014-15 budget that reflects significant steps to align resources needed to implement the instructional strategies desired by the KCS leadership</i>	1. Updates on early implementation of resource alignment opportunities specified in the 2014-15 adopted budget (what’s going well, challenges, etc.)	1. Updates on early implementation of resource alignment opportunities specified in the 2014-15 adopted budget (what’s going well, challenges, etc.)	2. Updates on early implementation of resource alignment opportunities specified in the 2014-15 adopted budget (what’s going well, challenges, etc.)	1. Updates on early implementation of resource alignment opportunities specified in the 2014-15 adopted budget (what’s going well, challenges, etc.)
Outcome 2: <i>Knox County Schools develops a 3- to 5-year strategic finance plan that incorporates the district's programmatic priorities, the cost of implementing these priorities, and has a clear implementation plan to achieve these priorities within a 5-year timeframe (including key activities and activity owners).</i>	2. Refinements to Strategic Plan and Strategic Finance Plan implementation roadmap, as implementation unfolds	2. Refinements to Strategic Plan and Strategic Finance Plan implementation roadmap, as implementation unfolds	2. Refinements to Strategic Plan and Strategic Finance Plan implementation roadmap, as implementation unfolds	2. Refinements to Strategic Plan and Strategic Finance Plan implementation roadmap, as implementation unfolds
Outcome 3: <i>The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.</i>	3. June “pulse” survey results and potential impact on overall capacity-building plan and process design 4. Training of designated KCS staff (and any new hires) on tools/methodologies (as needed)	3. Training of designated KCS staff (and any new hires) on tools/methodologies (as needed)	3. Preliminary district financial summaries (analysis of operating expenditures across coded account categories) 4. Training of designated KCS staff (and any new hires) on tools/methodologies (as needed)	3. September “pulse” survey results and potential impact on overall capacity-building plan and process design 4. Training of designated KCS staff (and any new hires) on tools/methodologies (as needed)