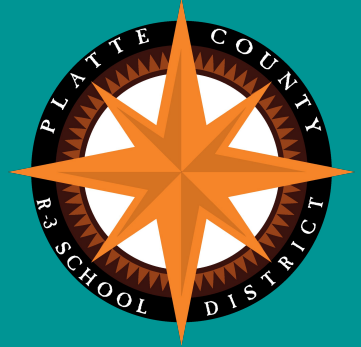




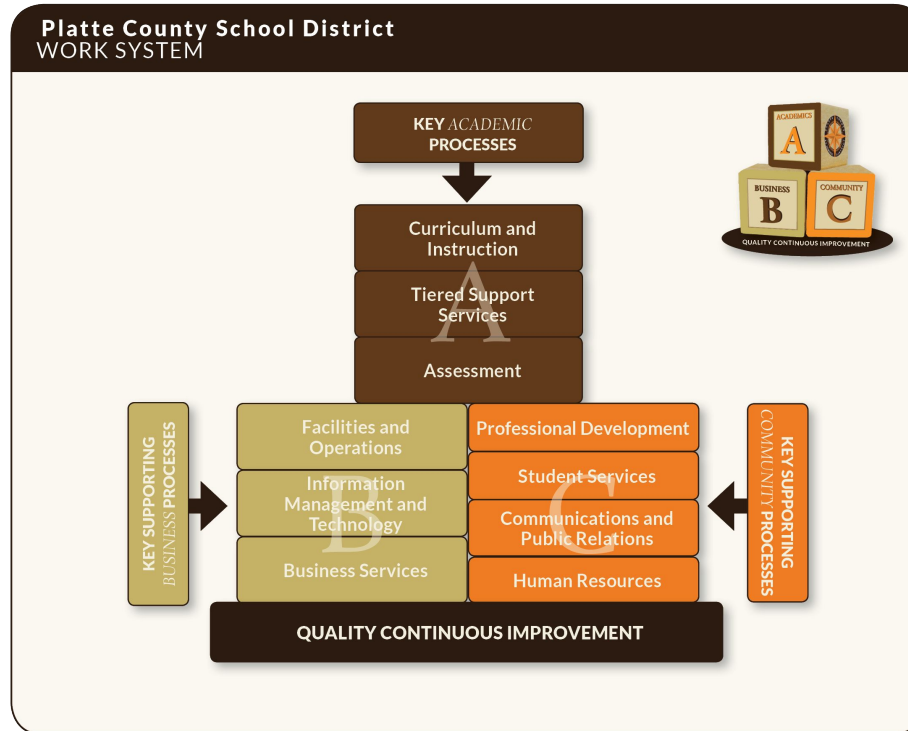
KEY PROCESS UPDATE

Business Services

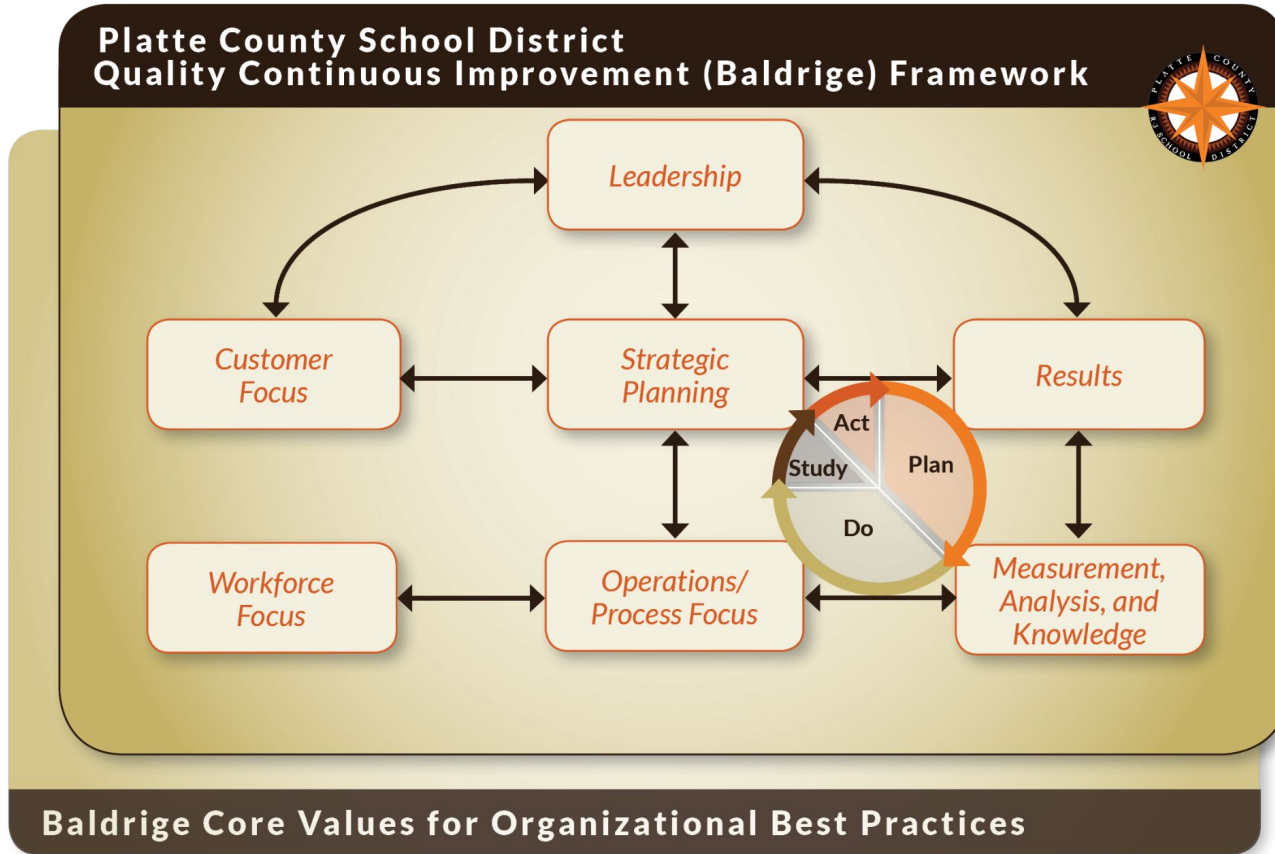
June 2024



WORK SYSTEM



QCI FRAMEWORK



LEADERSHIP

- **Business Services Team Members**

- Dr. Jay Harris – Superintendent
- Dr. Drew White - Deputy Superintendent
- Wayne Krueger – Interim Executive Director of Business Services
- Brian Noller - Incoming Executive Director of Business Services
- Emmy Brown – Business Services Manager
- Lynda Cowan – Accounts Payable/Receivable Specialist
- Teri White - Payroll Specialist
- Kari Lasley - Payroll Specialist
- Cheryl Spears - Interim Business Services Support

The purpose of Business Services is to proactively and responsibly manage district finances to support student success.



CUSTOMER FOCUS

- Parents and Community (from our 2021 Stakeholder Requirements Survey)

“What should the financial priorities be for our school district?”

- Attract and retain quality staff by providing competitive salaries and benefits
- Maintain manageable class sizes
- Maintain up-to-date technology
- Provide students and staff with quality educational supplies, materials and resources in the classroom
- Maintain clean, well-repaired, secure buildings

Our primary customers are our students and community. However, in our daily operations, we serve our staff.

Therefore, we have a multi-faceted responsibility to proactively and responsibly manage District finances for the success of our students, establish and maintain the trust of our community, and meet the needs of our staff.



CUSTOMER FOCUS

- **Students (*from our Focus Groups*)**
 - Quality teachers
 - Meaningful connections and experiences with staff and other students
 - Real World Learning - engaging and relevant experiences and access to resources
 - Co-curricular and extra-curricular opportunities
 - Safe and caring environment
 - Equitable experiences (ex. Middle School alignment)

Our primary customers are our students and community. However, in our daily operations, we serve our staff.

Therefore, we have a multi-faceted responsibility to proactively and responsibly manage District finances for the success of our students, establish and maintain the trust of our community, and meet the needs of our staff.



CUSTOMER FOCUS

- Staff (from our Focus Groups)
 - Quality Professional Development
 - Behavior Management
 - Competitive salary & benefits for our staff

Our primary customers are our students and community. However, in our daily operations, we serve our staff.

Therefore, we have a multi-faceted responsibility to proactively and responsibly manage District finances for the success of our students, establish and maintain the trust of our community, and meet the needs of our staff.



CUSTOMER FOCUS

- Staff (BST)

- Enhance the operational efficiency of Business Services by restructuring essential job functions
- Maintain reserve fund balance in the range of 18-22% in funds 1 and 2 (BOE Policy DIAA)
- Develop staff compensation plans to have all employee categories in the top 1/3 of Local 15 comparisons
- Focus on safety & security enhancements for all environments
- Ensure sufficient resources for tier 1, 2 & 3 strategies and instructional priorities aligned with CSIP and BSIP.
- Focus on funding programs and services based on student needs and outcomes
- Identify and investigate strategies to enhance revenue while being fiscally responsible with budgeted expenditures
- Cultivate Internal Controls to align with best practices

Our primary customers are our students and community, However, in our daily operations, we serve our staff.

Therefore, we have a multi-faceted responsibility to proactively and responsibly manage District finances for the success of our students, establish and maintain the trust of our community, and meet the needs of our staff.



RESULTS

- **Performance Measures**
 - Fund Balance
 - Bond Rating
 - Audit Results
- **Perception Measures**
 - Tax Levy By District
 - Stakeholder Survey - Value for Tax Dollars & Managing Enrollment Growth



RESULTS

Fund Balance							
	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
<i>Reserve Ratio</i>	14.00%	15.19%	18.13%	21.82%	28.14%	24.47%	27.1%

PCR-3 Bond Ratings		
Year	General Obligation Bond Rating	Leasehold Revenue Bond Rating
<i>2019-20</i>	AA	AA-
<i>2020-21</i>	AA	AA-
<i>2021-22</i>	AA	AA-
<i>2022-23</i>	AA	AA-
<i>2023-24</i>	AA	AA-

PCR-3 Audit Findings		
Year	Material Weaknesses	Written Findings for Federal Programs
<i>2019-20</i>	0	0
<i>2020-21</i>	0	0
<i>2021-22</i>	0	0
<i>2022-23</i>	0	0
<i>2023-24</i>	0	0



RESULTS

Tax Levy by District

Fort Osage	\$6.3700
Raytown	\$6.3200
Grandview	\$5.9557
Liberty	\$5.9277
Blue Springs	\$5.7286
North Kansas City	\$5.6663
Lee's Summit	\$5.4837
Independence	\$5.4371
Park Hill	\$5.3955
Excelsior Springs	\$5.2262
Platte County	\$5.0193
Grain Valley	\$4.9263
Smithville	\$4.8404
Kearney	\$4.7742
North Platte	\$4.7400
West Platte	\$3.9999

2023 tax rates per DESE



RESULTS

- Parent Survey

The District provides value for the tax dollars spent.

Cycle	Responses	Top Level(s) Percent	Neutral Percent	Bottom Level(s) Percent	Survey Performance Index (SPI)
2019-20	1258	70.19%	22.10%	7.71%	384.34
2020-21	1221	68.39%	21.95%	9.67%	375.18
2021-22	1138	66.61%	21.70%	11.69%	372.32
2022-23	1073	68.50%	21.71%	9.79%	378.56
2023-24	597	67%	23%	11%	367.34

The District is proactively and effectively managing student enrollment growth.

Cycle	Responses	Top Level(s) Percent	Neutral Percent	Bottom Level(s) Percent	Survey Performance Index (SPI)
2019-20	1254	59.89%	26.87%	13.24%	363.40
2020-21	1220	59.75%	28.34%	11.88%	362.30
2021-22	1135	59.12%	27.58%	13.30%	359.91
2022-23	1071	60.59%	28.10%	11.30%	366.01
2023-24	590	58%	29%	12%	353.22



RESULTS

- Certified Staff Survey

The District provides value for the tax dollars spent.

Cycle	Responses	Top Level(s) Percent	Neutral Percent	Bottom Level(s) Percent	Survey Performance Index (SPI)
2019-20	252	69.05%	21.83%	9.13%	368.65
2020-21	205	69.27%	24.88%	5.85%	378.54
2021-22	216	61.11%	26.39%	12.50%	358.31
2022-23	265	62.64%	27.92%	9.44%	366.42
2023-24	164	60%	30%	10%	360.67

The District is proactively and effectively managing student enrollment growth.

Cycle	Responses	Top Level(s) Percent	Neutral Percent	Bottom Level(s) Percent	Survey Performance Index (SPI)
2019-20	254	56.69%	25.59%	17.72%	344.88
2020-21	206	67.96%	19.90%	12.13%	366.99
2021-22	216	71.76%	18.06%	10.18%	371.30
2022-23	265	67.55%	23.02%	9.44%	370.94
2023-24	164	55%	21%	24%	339.63



RESULTS

- Classified Staff Survey

The District provides value for the tax dollars spent.

Cycle	Responses	Top Level(s) Percent	Neutral Percent	Bottom Level(s) Percent	Survey Performance Index (SPI)
2019-20	125	63.20%	29.60%	7.20%	372.80
2020-21	94	61.70%	28.72%	9.57%	371.28
2021-22	89	49.44%	41.57%	8.99%	356.18
2022-23	104	55.77%	29.81%	14.42%	350.00
2023-24	77	41%	42%	17%	325.97

The District is proactively and effectively managing student enrollment growth.

Cycle	Responses	Top Level(s) Percent	Neutral Percent	Bottom Level(s) Percent	Survey Performance Index (SPI)
2019-20	125	58.40%	35.20%	6.40%	368.80
2020-21	94	61.70%	31.91%	6.38%	377.66
2021-22	90	57.78%	34.44%	7.78%	366.67
2022-23	104	58.66%	31.73%	9.61%	371.15
2023-24	77	45%	34%	21%	325.97



STRATEGIC PLANNING

- Key Process Strategic Goals 2024-25
 - Enhance operational efficiency of data and practices within the PCR-3 District
 - Maintain fund balance in the desired range of 18-22% while building our fund 4 balance
 - Improve stakeholder perception of the District's fiscal responsibility

CSIP Goal:
The overall goal of the Business Strategic Focus Area is to proactively and responsibly manage district growth, finances, and support services to improve student achievement.

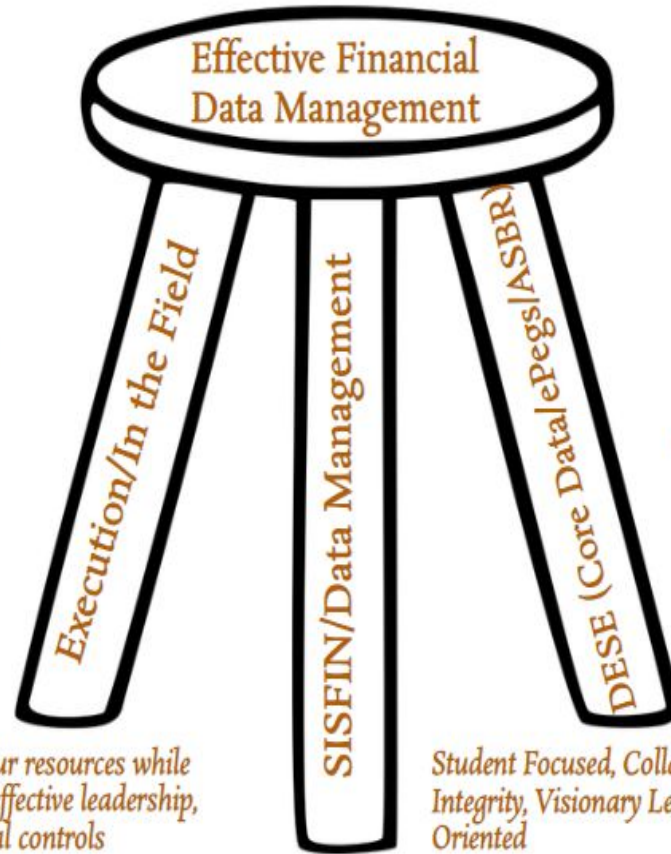


STRATEGIC PLANNING

- **Action Items**
 - **Enhance Operational Efficiency**
 - Reviewing and formalizing processes for collecting, assigning, and reporting data
 - BST-HR-Director's Collaboration Processes
 - Internally auditing current data for accuracy and making necessary adjustments
 - Continuous monitoring
 - Reinforce processes and staff training to increase efficiency
 - Tracking errors, identify improvement and taking actions/strategies to correct



STRATEGIC PLANNING



An approach to maximize our resources while staying in compliance with effective leadership, vision, processes and internal controls

Student Focused, Collaborative, High Expectations, Integrity, Visionary Leadership, Innovation, Results Oriented

CSIP Goal:

The overall goal of the Business Strategic Focus Area is to proactively and responsibly manage district growth, finances, and support services to improve student achievement.



STRATEGIC PLANNING

- **Action Items**

- **Maintain a Healthy Fund Balance**

- Expedite the budget development timeline and pay approval
 - Monthly monitoring and accountability of purchases and balances
 - Continuous review of the zero-based budgeting process
 - Continuous focus on building fund 4 balances
 - Long-range facility and capital improvement planning
 - Five-year projections – expenditure/revenue
 - Continuous review of the budget action plan

- **Fiscal Responsibility Perception**

- Collaborating on the creation of the Annual Report
 - Creating a comprehensive, informative budget document
 - Being more intentional in educating our board and our community on opportunities and challenges of school finance as well as the state of our district



QUESTIONS?

