



## Superintendent's Proposed Budget

Submitted to the Milwaukee Board of School Directors on April 26, 2017

Fiscal Year: July 1, 2017 – June 30, 2018

Organizational



## Table of Contents – Organizational Section

District’s Mission, Vision, Core Beliefs and Goals.....	2-3
Mission .....	2-3
Vision .....	2-3
Core Beliefs.....	2-3
Goals.....	2-4
School District Structure and Organization .....	2-4
Map 2.1 Milwaukee Area .....	2-4
Milwaukee Board of School Directors .....	2-5
Map 2.2 Milwaukee Board of School Directors Regions .....	2-6
District Board Members .....	2-7
Director Mark Sain, District 1 .....	2-7
Director Wendell J. Harris, Sr., District 2 .....	2-8
Director Michael Bonds, Ph.D., District 3.....	2-9
Director Annie Woodward, District 4 .....	2-10
Director Larry Miller, District 5.....	2-11
Director Luis A. Báez (Tony), Ph.D., District 6 .....	2-12
Director Paula Phillips, District 7 .....	2-13
Director Carol Voss, District 8.....	2-14
Director Terrence Falk, Member at Large .....	2-15
Chart 2.3 MPS Organizational Chart.....	2-16
Superintendent of Milwaukee Public Schools.....	2-17
Darien B. Driver, Ed.D., Superintendent.....	2-17
Chart 2.4 MPS Offices and Departments Organizational Chart .....	2-18
Regional System of Support .....	2-19
District Goals and Objectives.....	2-20
Academic Achievement .....	2-20
Student, Family and Community Engagement.....	2-20
Effective and Efficient Operations.....	2-21
District Strategic Plan Development.....	2-21
Strategic Plan Execution & Layout.....	2-21
Chart 2.5 Strategic Plan Layout .....	2-22
Chart 2.6 Eight Big Ideas 2016-17 Strategic Plan.....	2-23

2016–17 Strategic Plan Project Accomplishments..... 2-25

Strategic Business, Community, District and Family Partnerships ..... 2-27

District Budget Development ..... 2-29

    Chart 2.7 Budget Development Timetable..... 2-30

    Gaining Commitment to Pay for MPS Budget Priorities..... 2-31

    Budget Constraints ..... 2-32

    Chart 2.8 Representation of Revenue Limits..... 2-34

    Statutory Budget Requirements..... 2-35

Basis of Budgeting/Budgetary Control ..... 2-35

    Consolidated Fund Summary ..... 2-36

    Chart 2.9 District Fund Descriptions..... 2-36

    Governmental Fund Types ..... 2-37

    Chart 2.10 District Fund and Reporting Entity Structure ..... 2-37

    Fund Balance ..... 2-37

Financial Management..... 2-38

    Basis of Accounting..... 2-38

    Basis of Fund Accounting..... 2-38

    Encumbrance Method of Accounting..... 2-39

    Summary of Other Significant Accounting Policies ..... 2-39

        Reporting Entity..... 2-39

        Basis of Presentation Government-wide and Fund Financial Statements..... 2-39

        Property Taxes..... 2-39

Financial Policies..... 2-40

    Annual Operating Budget (3.01)..... 2-40

    Budget Control (3.02) ..... 2-41

    Operating Reserve (3.03)..... 2-41

    Fund Transfer (3.04) ..... 2-42

    Fund Carryover (3.05)..... 2-43

    Fiscal Accounting and Reporting (3.06)..... 2-44



# Organizational Section

The Milwaukee Public Schools budget is organized into four sections: Budget-in-Brief; Organizational; Financial, including Schools, Central Services and Line Items; and Informational, including City Profile, MPS Profile and Glossary.

The Organizational section of the 2017–18 Superintendent’s Proposed Budget includes information on the school district, the City of Milwaukee, the Milwaukee Board of School Directors, the superintendent and administrative officers. The district’s structure and organization, purpose, goals and strategic objectives are also described.

## District’s Mission, Vision, Core Beliefs and Goals

The district began work to update the district’s strategic plan in late 2012 with a series of public meetings allowing facilitators to collect input from our staff, students and members of the community. This inclusive process has continued with a series of updates, surveys and outreach sessions in the district.

The key elements of the plan – the mission statement, vision statement, core beliefs and goals – were updated to incorporate the feedback received in public meetings, parent and student gatherings, and MPS online surveys. At its February 2014 meeting, the Milwaukee Board of School Directors unanimously approved the updated key elements that are the basis for the superintendent’s comprehensive plan to improve student achievement.

### *Mission*

MPS is a diverse district that welcomes all students, preparing them for success in higher education, post-educational opportunities, work and citizenship.

### *Vision*

MPS will be among the highest student growth school systems in the country. All district staff will be committed to providing an educational environment that is child-centered, supports achievement and respects diversity. Schools will be safe, welcoming, well-maintained and accessible community centers meeting the needs of all. Relevant, rigorous and successful instructional programs will be recognized and replicated. The district and its schools will collaborate with students, families and community for the benefit of all.

### *Core Beliefs*

1. Students come first.
2. Wherever students are learning is the most important place in the district.
3. Educators and school staffs have high expectations for all students and provide the foundation for their academic success.
4. Leadership, educator development and child-driven data-informed decision making are keys to student achievement.
5. Involved families are integral to increasing student achievement.
6. Student voice is encouraged and respected.
7. Quality community partnerships add value.



8. Increased operational and financial efficiencies are consistently pursued to support learning opportunities for our students.
9. Central Services supports student achievement, efficient and effective operations, and student, family and community engagement.

## Goals

1. Academic Achievement
2. Student, Family and Community Engagement
3. Effective and Efficient Operations

## School District Structure and Organization

Milwaukee Public Schools was established on February 3, 1846, and is operated pursuant to Chapter 119 of the Wisconsin Statutes. MPS is effectively treated by state statutes as a city department but is authorized by law to adopt its own budget. The city is required to levy and collect property taxes to support the MPS budget. The City of Milwaukee is the urban center of the metro region depicted in Map 2.1.

All funds for MPS flow through the city treasurer who, by statute, disburses them at the direction of the Milwaukee Board of School Directors (MBSD). The city comptroller, city treasurer and city attorney perform their respective functions for MPS as well as the city.

MPS does not have authority to issue debt. The City of Milwaukee's Common Council has authority under Chapters 67 and 119 of Wisconsin Statutes to issue municipal obligations for specific school purposes. When debt financing is contemplated, MPS enters into an intergovernmental cooperation agreement with the City of Milwaukee for any issuance. Bonded indebtedness issued by the city under Chapter 119 for school purposes is limited to two percent of the full value of taxable property in Milwaukee. Bonded indebtedness issued by the city under Chapter 67 for school purposes counts against the city's debt limit of five percent of the full value of taxable property in the city.

The district, governed by the nine-member elected Milwaukee Board of School Directors, provides education services from pre-kindergarten through grade 12 to City of Milwaukee residents and its participating transfer students who reside outside of the city.

The purpose and responsibility of the district is to provide a quality educational system that prepares children for personal and professional success after graduation. In addition to regular educational programs, the district offers comprehensive programs in the areas of special education, early childhood education, and bilingual and multicultural education. MPS has the greatest variety of high-performing programs in the city, from strong traditional neighborhood schools to Advanced Placement, arts specialty, career and technical education, gifted

Map 2.1 Milwaukee Area



and talented, International Baccalaureate, language immersion and Montessori. MPS also offers other college and career preparatory programs including engineering, finance, hospitality and tourism, health sciences, and information technology.

In 2017–18 the district will serve a projected 76,534 students in 159 schools. The students are served in schools including 98 elementary and K–8 schools, six schools serving grades 6–12 or K–12, six middle schools, fifteen high schools, sixteen non-instrumentality charter schools, five instrumentality charter schools, seven partnership schools and six alternative schools.

The students of MPS are racially and ethnically diverse: 54.6 percent African American, 25.8 percent Hispanic, 12.0 percent White, 6.8 percent Asian, 0.7 percent Native American and 0.1 percent Hawaiian/Pacific Islander. Over 60 languages are spoken by our English-language learners.

### *Milwaukee Board of School Directors*

The Milwaukee Board of School Directors serves as the district’s governing body in accordance with state and federal law. Board members are responsible for policymaking, adopting the budget and approving personnel, curriculum and other district business matters. Elected by the voters of the district, board members work to advance student achievement and well-being through public education, which motivates learners, fosters inclusion, inspires innovation and builds community.

The Milwaukee Board of School Directors consists of nine members: one member elected at large, and eight members elected from numbered districts as determined by the Milwaukee Board of School Directors. The regular term of each member is four years and until their successors have been elected and qualified.

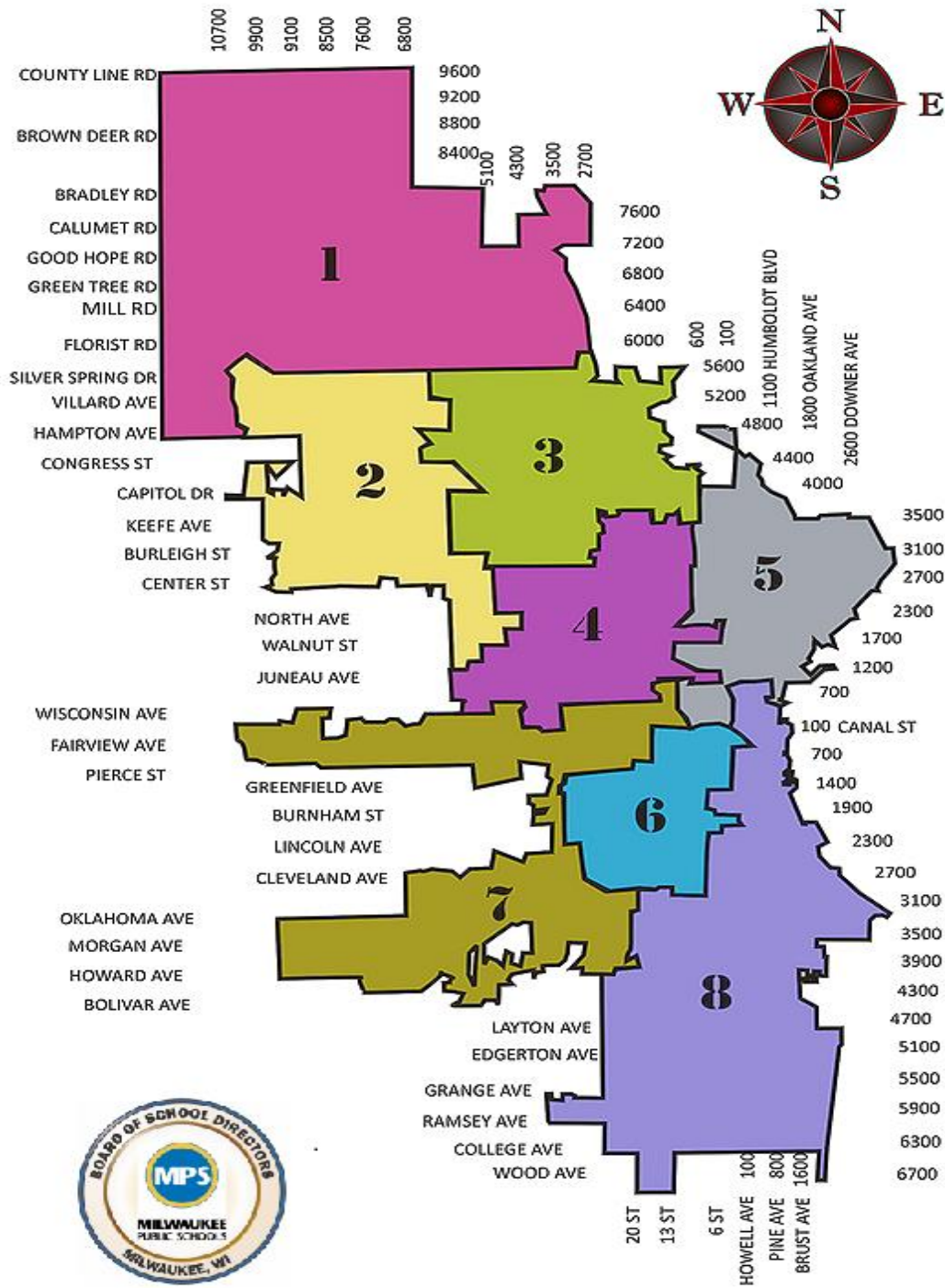
Legally, school boards are agents of the state, created by the legislature and selected by the electors of the local school district to represent and act for the state in providing the district with educational programs and facilities. The Milwaukee Board of School Directors is the policy-making body for the school system, serving within the framework provided by law, the will of the local citizenry, and the ethics of the education profession.

**Beyond the Board Room** is an initiative of the Milwaukee Board of School Directors designed to increase two-way communication between the elected school board members and their constituencies, to keep their constituents informed and to create a medium for constituent input. The Beyond the Board Room initiative includes the following:

- **Community Learning Opportunities** provide constituents with a better understanding of the role of the Milwaukee Board of School Directors. Sessions are interactive and are facilitated by members of the Milwaukee Board of School Directors. All participants in these learning opportunities receive certificates of participation.
- **Community Meetings** create an informal forum for communication with members of the Milwaukee Board of School Directors. Community meetings may be offered in the form of open forums, town hall meetings, listening circles, and more.
- **Newsletters** are electronic communication from members of the Milwaukee Board of School Directors directly to their constituents. Newsletters include information specific to each board member's district.

Map 2.2 depicts the eight numbered districts adopted on October 27, 2011. Individual Board member snapshots follow the map and include Milwaukee Board of School Directors' bios, a map displaying the specific district boundary and where schools are located within the district, and a list of the schools in each district. There is also one at-large director, who is elected by a citywide vote.

Map 2.2 Milwaukee Board of School Directors Regions







# Mark Sain

District 1  
 President  
 Term Expires: April 2019

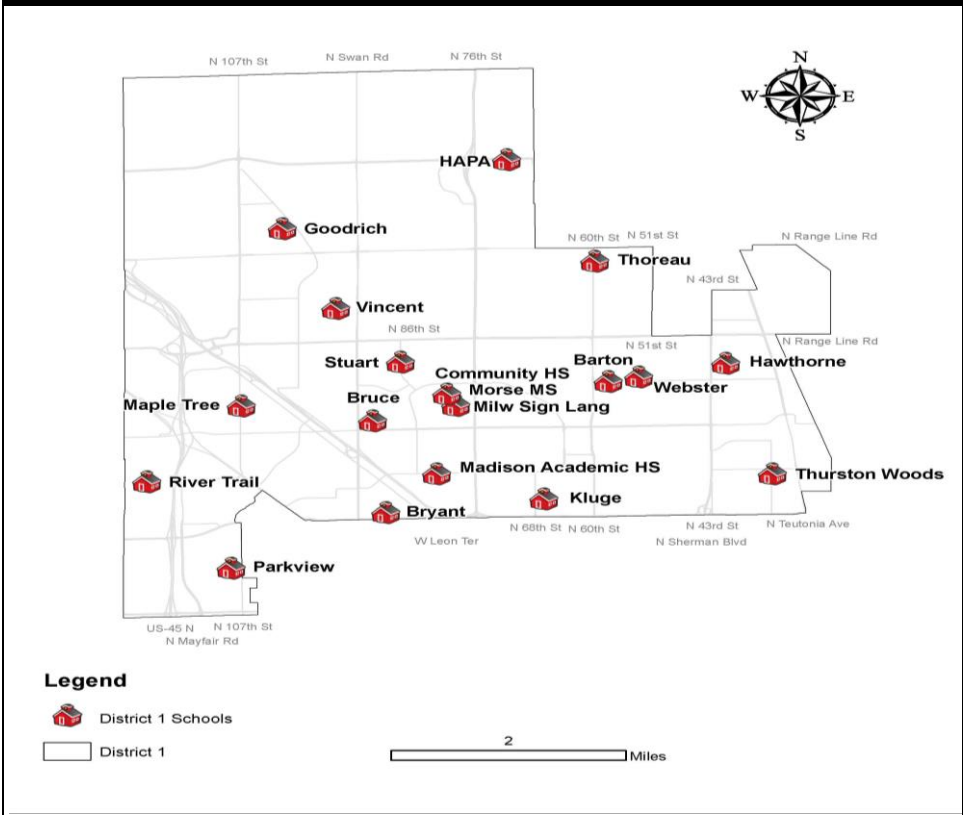
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## About Mark Sain

Mark Sain, who was first elected in April 2011, is a lifelong resident of Milwaukee who graduated from Washington High School. Mr. Sain and his wife, Charlotte, are the proud parents of four adult daughters and the proud grandparents of seven grandsons and one granddaughter. All of his school-age grandchildren attend MPS schools. Mr. Sain became a firefighter in 1980 and retired after a stellar career in 2008. He held multiple positions, from firefighter up to assistant chief. As the assistant chief, he provided leadership to the 1,100 members of the Milwaukee Fire Department and managed an annual budget of \$92 million. Mr. Sain has continued being an active member of the community, having worked with the Helen Bader Foundation's Homework First Program at Phillis Wheatley School, has tutored MPS high school students in reading comprehension and has sat on the advisory committees of many local agencies. He has worked with Marquette University's Mediation Program. He is also a trustee of the Milwaukee Public Library. Mr. Sain is committed to the education of the students of MPS. With the help of parents, teachers, students and the Milwaukee community, he feels we can make it happen.

## Map of District 1



## District 1 Schools

### Elementary

- Clara Barton School
- William Cullen Bryant School
- William George Bruce School
- Lowell P. Goodrich School
- Nathaniel Hawthorne School
- Richard Kluge School
- Maple Tree School
- Parkview School
- Gilbert Stuart School

### Middle Schools

- Morse Middle School For The Gifted And Talented

### High Schools

- Community High School
- James Madison Academic Campus
- Harold S. Vincent High School
- Vincent Acceleration

### K-8 Schools

- Milwaukee Sign Language School
- River Trail School
- Henry David Thoreau School
- Thurston Woods Campus

### Multi-Level Schools

- Webster

### Non-Instrumentality Charters

- Hmong American Peace Academy (HAPA)



# Wendell J. Harris, Sr.

District 2  
 Director  
 Term Expires: April 2019

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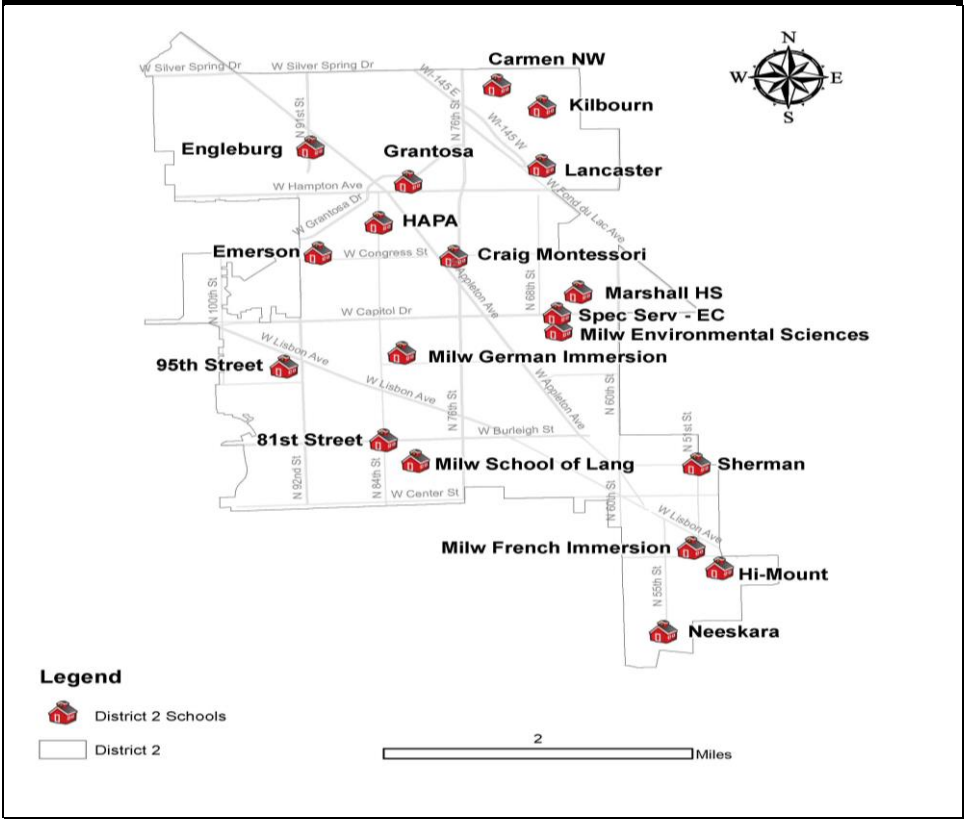


## About Wendell Harris Sr.

Wendell J. Harris, who was first elected to the board in April 2015, has more than 25 years' experience in serving the Milwaukee community. Mr. Harris has served as the first vice president of the NAACP Wisconsin State Conference of Branches Education Committee and as president of the National Coalition of Black American Men, while working with many other community-based organizations throughout the city of Milwaukee. In 1992, Mr. Harris received the "Black Excellence Award for Community Volunteerism" from Bank One and the Milwaukee Times and was nominated for the "Jefferson Award" for outstanding service to the Milwaukee community from TV6/WITI and Marquette University.

Mr. Harris has a Masters of Science degree in Human Services from Springfield College in Milwaukee, Wisconsin, with an emphasis on organizational management and leadership. He has worked in both volunteer and professional capacities within the Milwaukee Public Schools for over 22 years. He and his wife, Rozalia, have been married 20 years and have a son, Damien, who attends Golda Meir High School.

## Map of District 2



## District 2 Schools

- |   |   |
|---|---|
| <b>Elementary</b><br><ul style="list-style-type: none"> <li>● Eighty-First Street School</li> <li>● Ralph Waldo Emerson School</li> <li>● Engleburg School</li> <li>● Byron Kilbourn School</li> <li>● Milwaukee French Immersion School</li> <li>● Milwaukee German Immersion School</li> <li>● Neeskara School</li> <li>● Ninety-Fifth Street School</li> </ul> | <b>Multi-Level Schools</b><br><ul style="list-style-type: none"> <li>● Milwaukee School of Languages</li> </ul>   |
| <b>K-8 Schools</b><br><ul style="list-style-type: none"> <li>● Craig Montessori School</li> <li>● Grantosa Drive School</li> <li>● Hi-Mount Community School</li> <li>● Lancaster School</li> <li>● William T. Sherman Multicultural Arts School</li> </ul>   | <b>High Schools</b><br><ul style="list-style-type: none"> <li>● John Marshall High School</li> </ul>  |
|   | <b>Non-Instrumentality Charters</b><br><ul style="list-style-type: none"> <li>● Carmen Northwest</li> <li>● Hmong American Peace Academy (HAPA)</li> <li>● Milw Environmental Sciences</li> </ul> |
|   | <b>Partnerships</b><br><ul style="list-style-type: none"> <li>● Special Serv - EC</li> </ul>  |



# Michael Bonds, Ph.D.

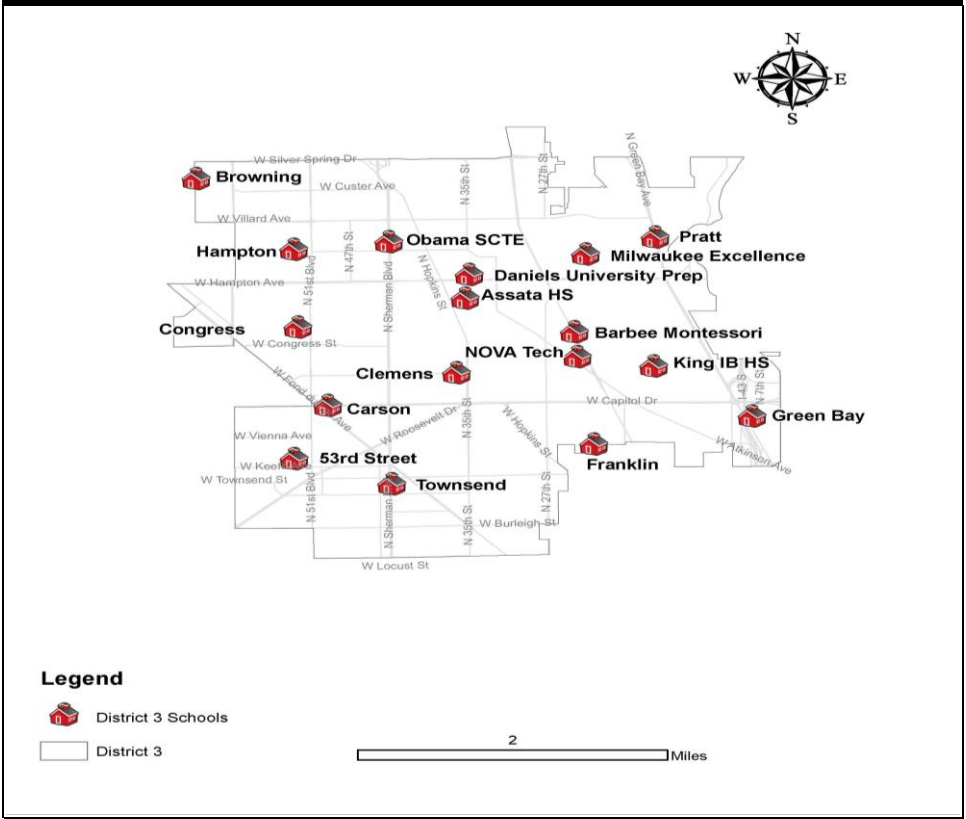
District 3  
 Director  
 Term Expires: April 2019

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## About Michael Bonds

Dr. Michael Bonds, who was first elected in April 2007, has served as a senior fiscal review analyst for the City of Milwaukee, giving him extensive experience in research, public policy analyses and fiscal analyses. He also served as an associate professor in the community education program at UWM. He has particular interest in and knowledge of community development issues, federal grants for community-based organizations and city agencies such as Community Development Block Grant (CDBG) program, urban problems and policies, race and ethnicity, history of African-American education, and the distribution of scarce public resources. Dr. Bonds's research interests include community development issues, community problems and urban policies and analysis, public resource distributions, and issues related to African-American education. He earned an M.S. in urban affairs, an M.P.A. in public administration and a Ph.D. in urban studies from University of Wisconsin–Milwaukee. Dr. Bonds served as the board's president from April 2009 until he stepped down in April 2016.

## Map of District 3



## District 3 Schools

- |   |   |
|---|---|
| <b>Elementary</b><br><ul style="list-style-type: none"> <li>● Lloyd Barbee Montessori School</li> <li>● Browning School</li> <li>● Samuel Clemens School</li> <li>● Green Bay Elementary</li> <li>● Hampton School</li> <li>● Marvin E. Pratt School</li> </ul> | <b>Multi-Level Schools</b><br><ul style="list-style-type: none"> <li>● Obama School of Career and Technical Education</li> </ul>  |
| <b>High Schools</b><br><ul style="list-style-type: none"> <li>● Rufus King International School</li> </ul>  | <b>Non-Instrumentality Charters</b><br><ul style="list-style-type: none"> <li>● Daniels University Prep</li> <li>● Milwaukee Excellence</li> <li>● NOVA Tech</li> </ul> |
| <b>K-8 Schools</b><br><ul style="list-style-type: none"> <li>● Dr. Benjamin Carson Academy of Science</li> <li>● Congress School</li> <li>● Fifty-Third Street School</li> <li>● Benjamin Franklin School</li> <li>● Townsend</li> </ul>                        | <b>Partnerships</b><br><ul style="list-style-type: none"> <li>● Assata High School</li> </ul>   |





# Annie Woodward

District 4  
 Director  
 Term Expires: April 2021

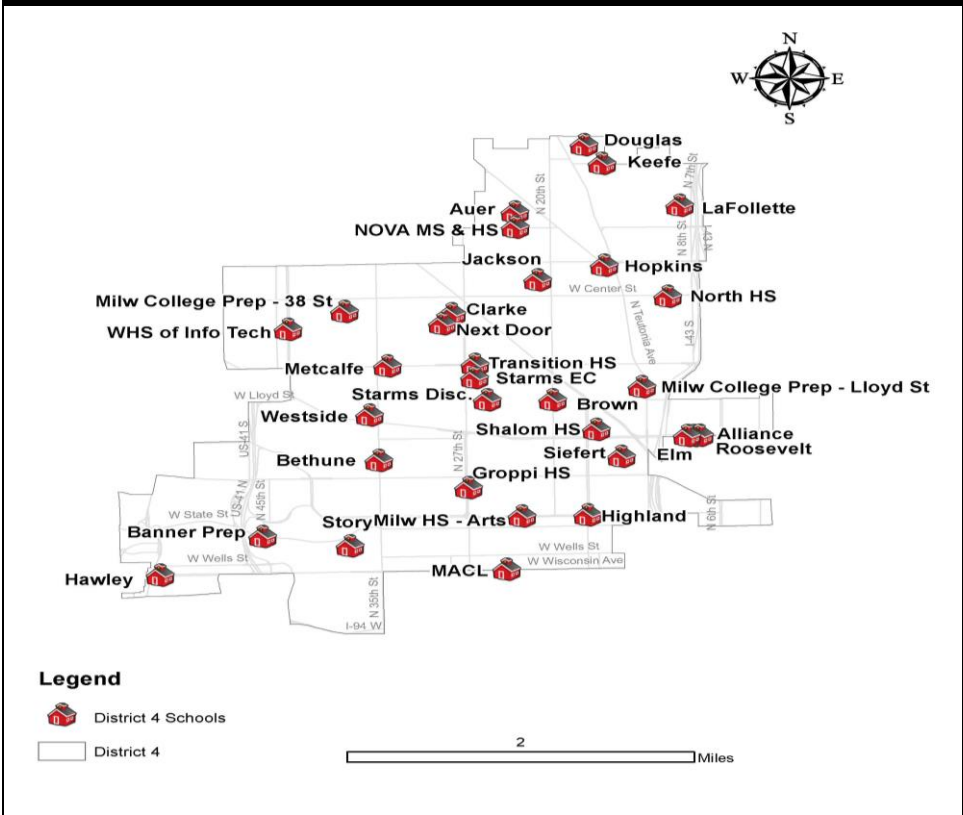
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## About Annie Woodward

Annie Woodward, who was elected in April 2009, is a community advocate with a passion for seeking higher academic standards for every child. She is a retiree from the Milwaukee County Department of Health and Human Services, having worked in the areas of mental health and social services from 1967 until 2001. From 1993 until 2000, Ms. Woodward served on the board of the Milwaukee Inner City Congregations Allied for Hope (MICAH) and on that organization's Economic Development Task Force and Health and Welfare Committee. Ms. Woodward served as chair of Parkview South Neighborhood and as treasurer of the Mary Church Terrell Club, Inc. As a member of Calvary Baptist Church, she serves as a deaconess and as a women's class Sunday school teacher. Ms. Woodward did her undergraduate studies in business management and communications at MATC, Alverno College and Concordia University.

## Map of District 4



## District 4 Schools

- |  |   |
|--|---|
| <b>Elementary</b> <ul style="list-style-type: none"> <li>●Brown Street Academy</li> <li>●Elm Creative Arts School</li> <li>●Hawley Environmental School</li> <li>●Jackson EC and Elementary</li> <li>●Siefert School</li> <li>●Starms EC</li> <li>●Westside Academy</li> </ul> | <b>K-8 Schools con't</b> <ul style="list-style-type: none"> <li>●Ralph H. Metcalfe School</li> <li>●Milwaukee Academy of Chinese Language</li> <li>●Starms Discovery</li> <li>●Albert Story School</li> </ul> |
| <b>Middle Schools</b> <ul style="list-style-type: none"> <li>●Roosevelt Creative Arts Middle School</li> </ul>   | <b>Instrumentality Charter Schools</b> <ul style="list-style-type: none"> <li>●The Alliance School of Milwaukee</li> </ul>  |
| <b>High School</b> <ul style="list-style-type: none"> <li>●Milw High School of The Arts</li> <li>●North Division</li> <li>●Washington IT</li> </ul>  | <b>MPS Altern Schools/Programs</b> <ul style="list-style-type: none"> <li>●James E. Groppi High School</li> <li>●Transition High School</li> </ul>  |
| <b>K-8 Schools</b> <ul style="list-style-type: none"> <li>●Auer Avenue School</li> <li>●Mary Mcleod Bethune Academy</li> <li>●Clarke Street School</li> </ul>  | <b>Non-Instrumentality Charters</b> <ul style="list-style-type: none"> <li>●Highland</li> <li>●Milw College Prep - 38th St</li> <li>●Milw College Prep - Lloyd St</li> <li>●Next Door</li> </ul>              |
|  | <b>Partnerships</b> <ul style="list-style-type: none"> <li>●Banner Prep</li> </ul>  |



# Larry Miller

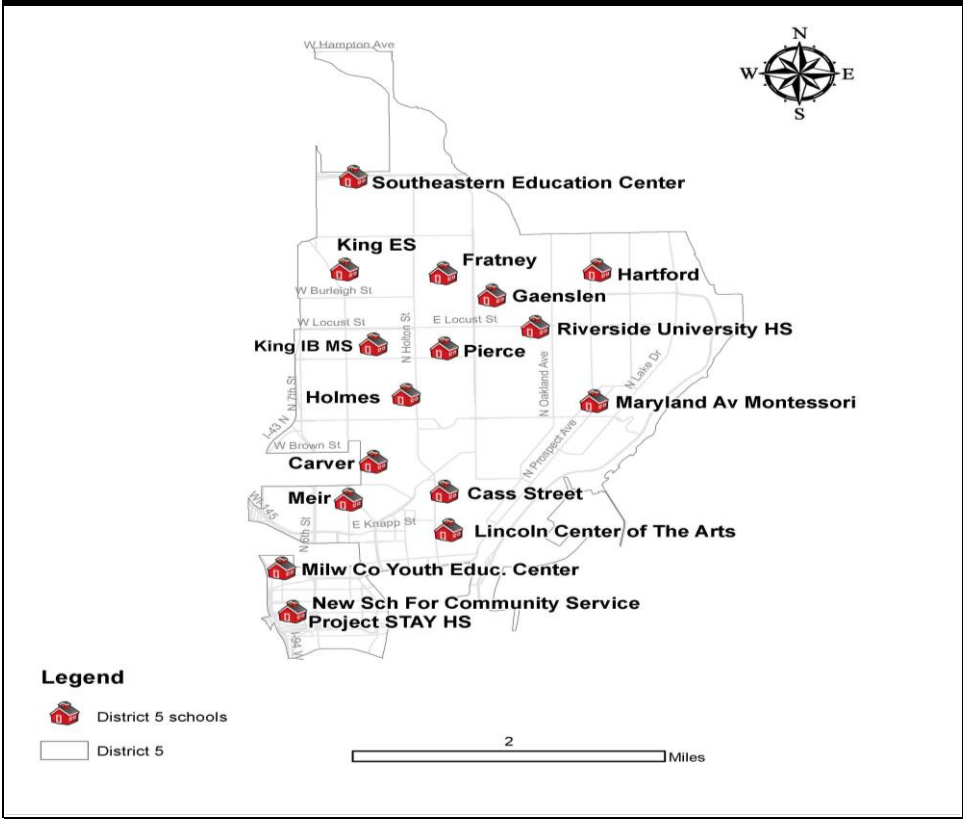
District 5  
 Vice President  
 Term Expires: April 2021

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## About Larry Miller

Larry Miller, who was elected in April 2009, is a graduate of the University of Wisconsin and National Louis University. He has an undergraduate degree in education, history and political science and a master's degree in education leadership. Mr. Miller was a teacher in MPS for 16 years, having taught high school U.S. history, citizenship, world geography, world history, economics, political science, photography, video production and physical science. He also was an administrator for two years. Mr. Miller is an adjunct for the Marquette College of Education, teaching "Schooling in a Diverse Society." Larry Miller is an editor of Rethinking Schools, a nationally prominent publisher of educational materials that remains firmly committed to equity and to the vision that public education is central to the creation of a humane, caring, multiracial democracy. While published for a broad audience, Rethinking Schools emphasizes problems facing urban schools, particularly issues of race. Both of Mr. Miller's children, Nathaniel and Craig Miller, are MPS graduates. His wife of 38 years is Ellen Bravo.

## Map of District 5



## District 5 Schools

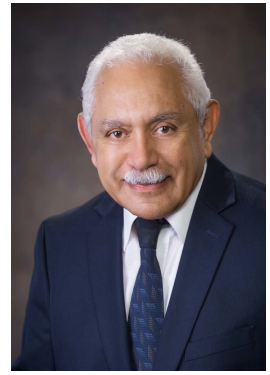
- |   |   |
|---|---|
| <b>Elementary</b> <ul style="list-style-type: none"> <li>●Fratney School</li> <li>●Franklin Pierce School</li> </ul>  | <b>K-8 Schools</b> <ul style="list-style-type: none"> <li>●Carver Academy</li> <li>●Cass Street School</li> <li>●Frederick J. Gaenslen School</li> <li>●Hartford Avenue University School</li> <li>●Oliver Wendell Holmes School</li> <li>●Dr. Martin Luther King Jr. School</li> <li>●Maryland Avenue Montessori School</li> </ul> |
| <b>Middle Schools</b> <ul style="list-style-type: none"> <li>●Rufus King International School-Middle Years Campus</li> <li>●Lincoln Center of The Arts</li> </ul> | <b>MPS Altern Schools/Programs</b> <ul style="list-style-type: none"> <li>●Milw Co Youth Educ Center</li> <li>●Project STAY</li> </ul>  |
| <b>High Schools</b> <ul style="list-style-type: none"> <li>●New School For Community Service</li> <li>●Riverside University High School</li> </ul>                | <b>Multi-Level Schools</b> <ul style="list-style-type: none"> <li>●Golda Meir School</li> </ul>   |
|   | <b>Partnerships</b> <ul style="list-style-type: none"> <li>●Southeastern Education Center</li> </ul>  |



# Luis A. Báez (Tony), Ph.D.

District 6  
 Director  
 Term Expires: April 2021

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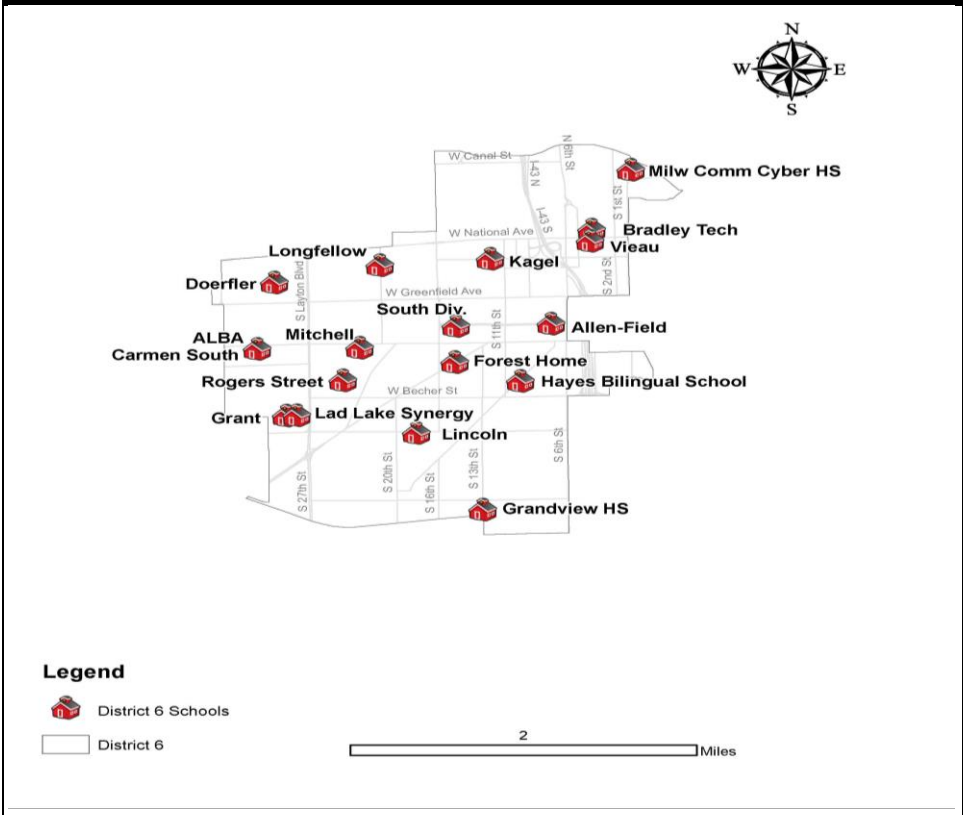
## About Dr. Tony Baez

Dr. Luis Antonio (Tony) Báez, who was elected in April 2017, has been extensively involved in public education. He has been a dean and vice-president/provost in two-year colleges; a staff and faculty member in a major research university (UW-Milwaukee); the administrator of two at-risk high schools; and the executive director of community-based organizations. He has trained educators, school principals, teachers, community members, and parents. He has been involved locally and nationally in bilingualism, multicultural education, diversity, dual-language education, adult learning, and ESL.

Dr. Baez has been involved in major bilingual and desegregation litigation as a resource to community groups and plaintiffs. For the past 40+ years, he has vigorously championed the equity and civil rights of Latinos and others locally and nationally, especially in areas of educational transformation, immigration, health, police-community relations, diversity, and civil rights.

Dr. Baez received the YWCA's Racial Justice Award (1990), the A Choice Commitment to Justice Award (1995), the Excellence in Education Award from the Milwaukee Board of School Directors (1995), the State Superintendent's Friend of Education Award (2013); the state's Martin Luther King Heritage Award for Social Justice (2014); and the City of Milwaukee's Frank P. Zeidler lifetime Public Service Award (2015). In 2010, the Wisconsin Association for Bilingual Education (WIABE) created the annual Tony Báez Leadership and Advocacy Award.

## Map of District 6



## District 6 Schools

### Elementary Schools

- Allen-Field School
- Forest Home Avenue School
- Albert E. Kagel School
- Lincoln Avenue School

### High Schools

- Lynde and Harry Bradley Technology and Trade School
- South Acceleration
- South Division High School

### K-8 Schools

- Anna F. Doerfler School
- U.S. Grant School
- Hayes Bilingual School
- H. W. Longfellow School
- Alexander Mitchell Integrated Arts School
- Rogers Street Academy
- Escuela Vieau School

### Instrumentality Charter Schools

- Academia De Lenguaje Y Bellas Artes (ALBA)

### Non-Instrumentality Charters

- Carmen South
- Milw Community Cyber (MC2) High School

### Partnerships

- Grandview
- LAD Lake Synergy





# Paula Phillips

District 7  
 Director  
 Term Expires: April 2021

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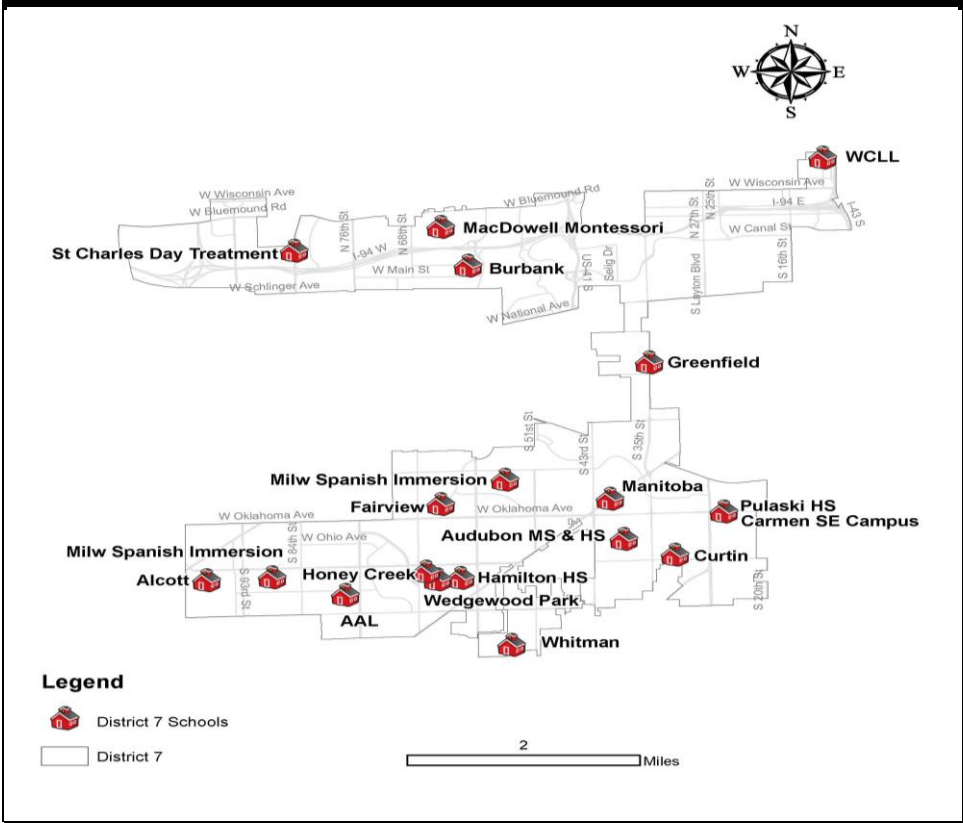
## About Paula Phillips

Paula Phillips, who was elected to represent the seventh district on the Milwaukee Board of School Directors in April 2017, developed a lifelong passion for education after seeing the tremendous impact it had on her own life and the stabilizing influence it can have on those who have difficult lives at home. She first came to Milwaukee to serve as an AmeriCorps volunteer with Public Allies, then continued to build her career in the nonprofit sector at City Year Milwaukee.

Prior to her nonprofit work, Ms Phillips worked at a local church, organizing domestic and international volunteer trips. She currently works to empower women and promote diverse leadership at the Medical College of Wisconsin. Her roles have included organizational change management, budget development/management, government relations, board development, staff development, office management, volunteer recruitment/management, talent acquisition, and strategic planning.

Paula is a first-generation college graduate who attended Milwaukee Area Technical College and received her B.S. in Agricultural and Applied Economics with a certificate in Global Health from the University of Wisconsin-Madison. She lives on Milwaukee's southwest side with her partner, Daniel.

## Map of District 7



## District 7 Schools

- |  |   |
|--|---|
| <p><b>Elementary Schools</b></p> <ul style="list-style-type: none"> <li>●Academy of Accelerated Learning</li> <li>●Milwaukee Spanish Immersion School (K4-K5)</li> <li>●Milwaukee Spanish Immersion School</li> </ul> <p><b>Middle Schools</b></p> <ul style="list-style-type: none"> <li>●Audubon Technology and Communication Middle School</li> <li>●Wedgewood Park International School</li> </ul> <p><b>High Schools</b></p> <ul style="list-style-type: none"> <li>●Audubon Technology and Communication High School</li> <li>●Alexander Hamilton High School</li> <li>●Casimir Pulaski High School</li> </ul> | <p><b>K-8 Schools</b></p> <ul style="list-style-type: none"> <li>●Louisa May Alcott School</li> <li>●Luther Burbank School</li> <li>●Jeremiah Curtin School</li> <li>●Fairview School</li> <li>●Greenfield School</li> <li>●Manitoba School</li> <li>●Walt Whitman School</li> </ul> <p><b>Instrumentality Charter Schools</b></p> <ul style="list-style-type: none"> <li>●Honey Creek</li> </ul> <p><b>Non-Instrumentality Charters</b></p> <ul style="list-style-type: none"> <li>●Carmen Southeast</li> </ul> <p><b>Mult-Level Schools</b></p> <ul style="list-style-type: none"> <li>●Edward A. MacDowell Montessori</li> <li>●WCLL</li> </ul> <p><b>Partnerships</b></p> <ul style="list-style-type: none"> <li>●St Charles Day Treatment</li> </ul> |
|--|---|



# Carol Voss

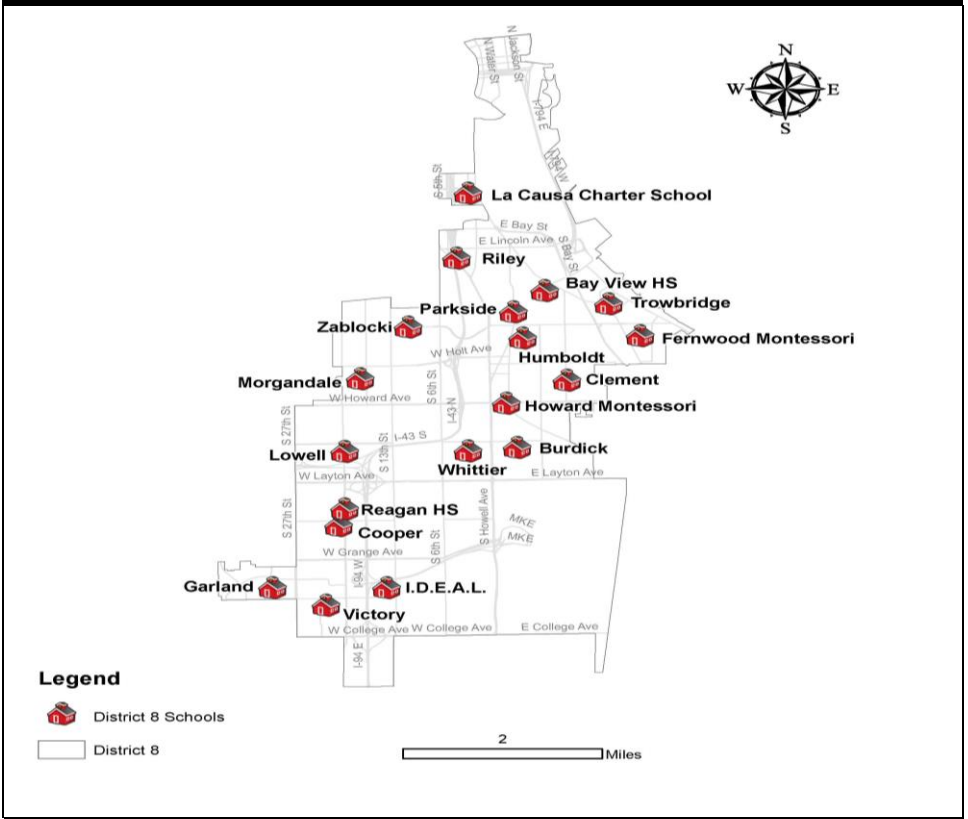
District 8  
 Director  
 Term Expires: April 2019

(414) 852-5817  
 governance@milwaukee.k12.wi.us

## About Carol Voss

Carol Voss, who was first elected to represent the eighth district on the Milwaukee Board of School Directors in April 2015, is a passionate MPS parent and community and business leader in Milwaukee. A lifelong Milwaukee resident, she is a public relations director in the nonprofit sector with past experience in healthcare settings. Ms. Voss is not only a nonprofit professional but also has been a dedicated volunteer in the “Believe in Bay View” initiative at Bay View High School and co-founded the Bay View Neighborhood Association (BVNA). She is also the founder of the Chill on the Hill concert series in Humboldt Park, among other efforts. Ms. Voss earned her B.S. degree in occupational therapy from the University of Wisconsin–Madison and an M.S. degree in business from the University of Wisconsin–Milwaukee. She is the daughter of two teachers, has been married 20+ years to her husband, David, and has two MPS children — one in a Montessori K3–8 school and one in an IB high school.

## Map of District 8



## District 8 Schools

### Elementary

- Howard Avenue Montessori School
- Lowell School
- James Whitcomb Riley School
- Clement J. Zablocki School

### High Schools

- Bay View High School
- Ronald Wilson Reagan College

### Preparatory High School

### K-8 Schools

- A.E. Burdick School
- Clement Avenue School
- James Fenimore Cooper School
- Fernwood Montessori School
- Hamlin Garland School
- Humboldt Park School
- Morgandale School
- Milwaukee Parkside School
- Trowbridge School of Discovery and Technology
- Victory K-8 School For The Gifted And Talented

### Instrumentality Charter Schools

- I.D.E.A.L.
- John Greenleaf Whittier School

### Non-Instrumentality Charter

- La Causa School



# Terrence Falk

Member at Large

Director

Term Expires: April 2019

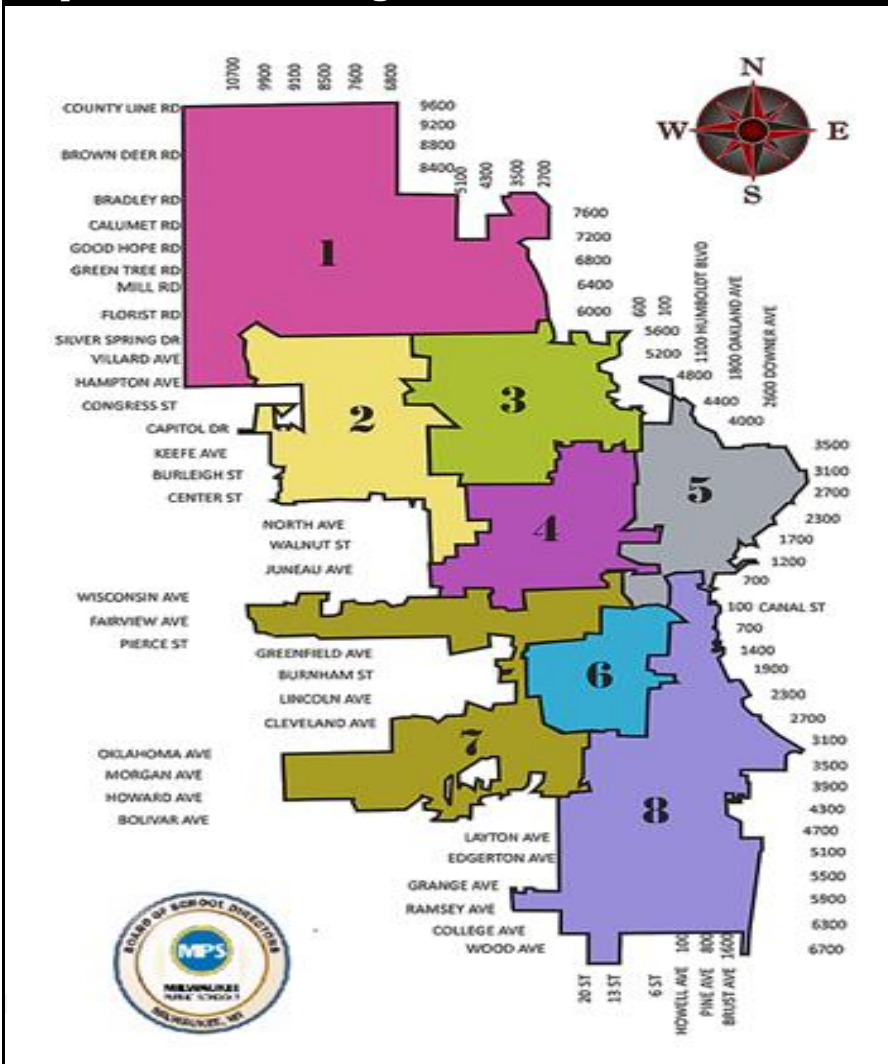
(414) 510-9173

[governance@milwaukee.k12.wi.us](mailto:governance@milwaukee.k12.wi.us)

## About Terrence Falk

Terrence Falk, who was first elected to the board in 2007, had previously served as an MPS English and speech teacher for more than 30 years. In 1997, he coached Juneau High School to a state debate title, the first ever for an MPS debate team. Mr. Falk has also written professionally for magazines such as Milwaukee Magazine, Science, and Wisconsin Trails. His wife, Janet, is a retired art teacher who taught in a local Catholic school. Both his son and his daughter are graduates of MPS — Juneau High School. Mr. Falk believes that education happens in the classroom, not the boardroom, and the policies of this district must be focused on supporting education at the classroom level. That means supporting good teachers, keeping class sizes manageable and fostering a well-rounded education of basics skills, critical thinking and creativity within a safe and nurturing school environment.

## Map of Member at Large

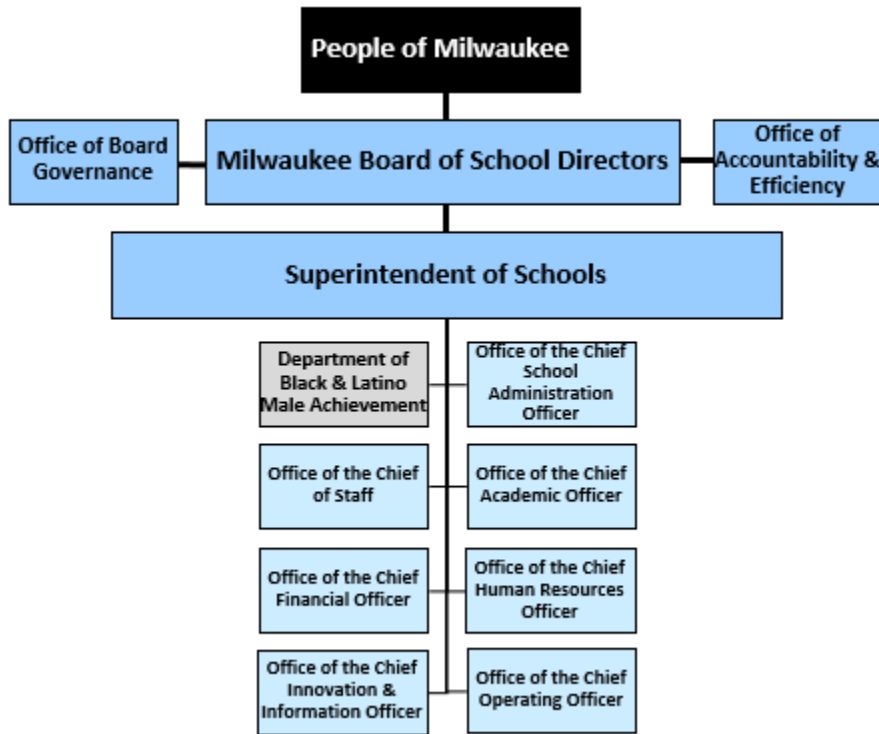


## Member at Large Schools

The Member at Large Board position represents all schools throughout the district.

Chart 2.3 shows the district organizational chart. The superintendent of schools; the board clerk, who also serves as the Chief of the Office of Board Governance; and the co-managers of the Office of Accountability and Efficiency report directly to the Milwaukee Board of School Directors. All other district positions report to the superintendent of schools.

Chart 2.3 MPS Organizational Chart



**The Office of Board Governance** provides support to the Milwaukee Board of School Directors in cooperation with but independent of the superintendent in effectively and efficiently governing the district. This support includes but is not limited to reviewing and proposing policy; conducting fiscal analyses; preparing communications for the board and public; fulfilling statutory or other legal requirements; preparing meeting notices and agendas for the meetings of the board and its committees; serving as the board's secretary, clerk, and parliamentarian; and maintaining records of the board's actions.

The Milwaukee Public Schools’ Board of School Directors established the **Office of Accountability and Efficiency** in 2010 to enhance transparency, oversight and accountability to the financial operations; to evaluate fiscal performance; and to recommend solutions in furtherance of fiscal stewardship of Milwaukee Public Schools.

**Superintendent of Schools** works with all of the district's major offices, the Milwaukee Board of School Directors and MPS school communities to put systems in place to prepare students for success in higher education, post-educational opportunities, work and citizenship.



## *Superintendent of Milwaukee Public Schools*

### *Darienne B. Driver, Ed.D., Superintendent*



On October 1, 2014, the Milwaukee Board of School Directors unanimously approved Dr. Darienne Driver to lead Milwaukee Public Schools. Dr. Driver is a high-energy visionary who has initiated a series of bold reform measures designed to improve student outcomes through deeper engagement with community organizations, parents, students and staff and by increasing opportunities for staff development and support.

Dr. Driver is committed to championing courageous and innovative initiatives that advance education for Milwaukee Public Schools students. Key efforts introduced under Dr. Driver's leadership include development of Eight Big Ideas, a series of organization-wide strategies that link and reinforce key efforts to improve outcomes; creation of a Regional Development Plan to expand high-performing programs and increase enrollment opportunities; and creation of a new high school region to provide a system of support to meet the unique needs of high schools.

Prior to being named superintendent, Dr. Driver was MPS's first chief innovation officer. In that role, she was successful in narrowing the achievement gap in the MPS Commitment Schools, which are the schools with the greatest need for improvement.

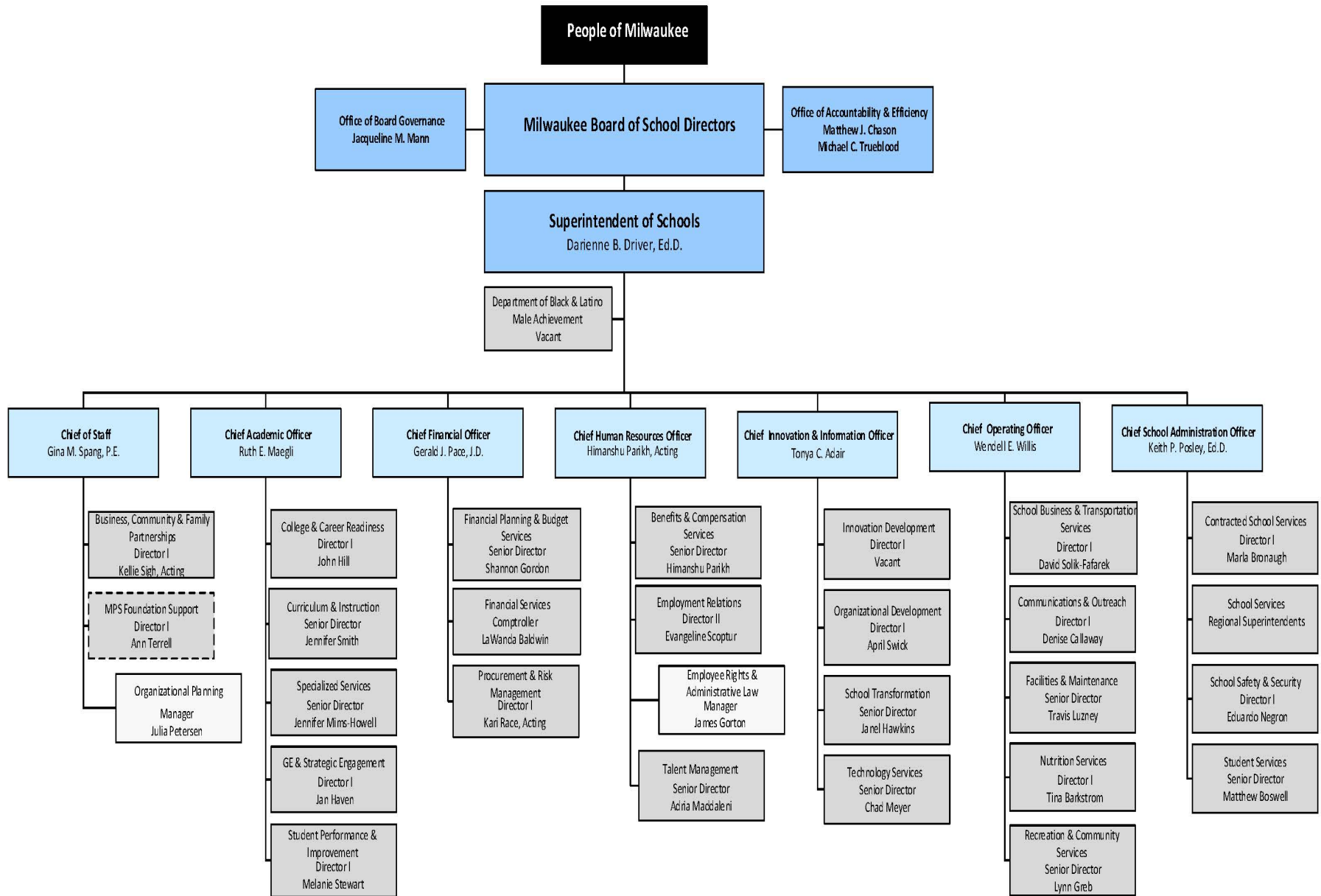
Before joining MPS, Dr. Driver served as deputy chief of empowerment schools for the School District of Philadelphia. Prior to her work in Philadelphia, she served as coordinator of strategic management and accountability and special assistant to the superintendent in Clayton County (GA) Public Schools. She began her career as an elementary school teacher in the Detroit Public Schools.

Dr. Driver's academic achievements include a doctorate from Harvard University in urban superintendency, master's degrees in education from Harvard University and in curriculum development from the University of Michigan, and an undergraduate degree from Spelman College in child development.

Dr. Driver is committed to working in partnership with organizations within Milwaukee and serves on the board of directors for the United Way of Greater Milwaukee and Waukesha County, City Year Milwaukee, The College Board–Midwest Regional Council and Superintendent's Advisory Council, Bradley Tech Commission, Educational Deans of Greater Milwaukee, Greater Milwaukee Committee–Education and Junior Achievement of Wisconsin in Metro Milwaukee. She serves as chair for the Youth Council of the Milwaukee Education Partnership, the Executive Council of Milwaukee Succeeds and the Public Policy Forum. Dr. Driver is also the chair-elect for the Council of the Great City Schools.

During her tenure as superintendent, Milwaukee Public Schools earned a Silver Well Workplace award from the Wellness Council of America and a Distinguished Budget Presentation award from the Government Finance Officers Association. In January 2015, Dr. Driver was acknowledged for her dynamic professional achievements and the contributions to build a stronger community by the *Milwaukee Business Journal* and was selected as a "40 under 40" award recipient. Chart 2.4 on the following page shows the superintendent's senior team and their direct reports who lead the various district departments and divisions.

Chart 2.4 MPS Offices and Departments Organizational Chart



## *Regional System of Support*

Through an **integrated system of school support**, supervision and accountability, MPS promotes academic achievement; meaningful student, family and community engagement; and effective and efficient operations. Work across the Offices of Academics, Innovation & Information and School Administration are being realigned to support each school community in the improved service to students and families while other offices and departments are changing their practices to reflect a more case-management approach to assist schools in problem solving and in their individual improvement efforts.

The **Office of School Administration** provides support, supervision, intervention strategies and accountability systems to schools and school leaders so students in all MPS schools have a safe, supportive learning environment and receive effective instruction that supports high student achievement. Regional superintendents support four geographic regions: Northwest, Central, Southwest, and East.

Regional superintendents assume general oversight of the day-to-day operational activities of school leaders related to culture and climate and help ensure compliance with the district's administrative requirements and deadlines. Regional managers of specialized services help ensure compliance with various special education regulations and use of strategies to improve educational outcomes for students with special education needs. Regional PBIS coaches support data analysis and use of positive behavioral interventions to improve student attendance, behavior and success. Regional attendance liaisons support staff assigned to address issues related to removing barriers to student attendance. These staff members meet with administration, students and families to ensure that barriers to attendance are reduced or removed and students access their education.

The **Office of Academics** serves as an anchor office providing leadership and support for academic curriculum. This work is supported by content-area managers, curriculum specialists and teacher leaders through curriculum, instructional guides and professional development content development. In addition to supporting curriculum and instruction, staff in Academics support student achievement through college and career readiness, specialized services, student performance and improvement and strategic engagement. Academics staff work collaboratively toward the consistency of Common Core State Standards aligned to curriculum and assessment. Effective instructional practices and the improvement of equitable access for all students to quality educational instruction, resources and programs to ensure evidence-based, developmentally appropriate practices is a priority.

The **Office of Innovation & Information** will support implementation of teaching and learning best practices. A new Transformation Network led by the Office of Information and Innovation is being developed which will consist of eight school zones, based on academic emphasis and school performance. Supported by two instructional superintendents, directors of school support will focus on individual needs of each school, and student performance coordinators will work closely with targeted schools and focus on data analysis and use of research-based methods to improve student achievement. An innovation coach will work with each director of school support as part of their team to support the teaching and learning at the classroom level through the school support teachers at each school. This office continues to support schools and district offices through professional training and development, research and evaluation, grants development, and equity, access and inclusion.

Each regional superintendent leads a **regional cross-functional team** accountable for supporting operational effectiveness, which includes representatives from the Office of the Chief of Staff along with Finance, Human Resources and Operations. Regional teams work closely with school-based parent coordinators. Parent

coordinators serve as the liaison between school and parents, relaying the needs of one to the other; educate teachers and staff on how to communicate and work effectively with parents as equal partners; advise and train parents on how to address issues with the leadership staff in school meetings; serve as a school-based intermediary contact for concerns and comments made by parents and community members; provide referrals to community-based services for families; develop community collaborations; promote sharing of power with parents as decision makers; help parents understand the education system so they can become better advocates for their children’s education; and maintain the parent resource center in their school.

A new Department of Black & Latino Male Achievement will support implementation of strategies, alignment of resources and supports designed to improve outcomes for black and Latino males throughout the district.

## District Goals and Objectives

The MPS district faces challenges on many fronts. To tackle those challenges head-on and change the operating dynamics of Wisconsin’s largest school district, the Milwaukee Board of School Directors established three system-wide goals: improved academic achievement; increased student, family and community engagement; and more effective and efficient operations.

To advance the Milwaukee Board of School Directors’ goals, the district developed a set of strategic objectives known as the “Eight Big Ideas.” These Eight Big Ideas include outcome statements that describe MPS in five years. Together, the board’s goals and the Eight Big Ideas create a cohesive yet flexible plan that aligns, drives and prioritizes our district’s work. When coupled with the district’s budget process, the plan becomes a powerful roadmap for fulfilling our mission in service of Milwaukee’s children.

### *Academic Achievement*

The first goal, Academic Achievement, includes these strategic objectives and outcomes:



# 1

**Close the Gap** – MPS is a national symbol of excellence for educating all students, providing a rigorous academic program that ensures equitable opportunities for all children to reach their full potential.



# 2

**Educate the Whole Child** – MPS provides a nurturing, consistent and validating experience for every child so that both educational and social-emotional needs are met.



# 3

**Redefine the MPS Experience** – Every MPS school provides robust co/extracurricular experiences that engage and inspire every child.



# 4

**Rethink High Schools** – Every MPS student graduates on time with a personalized pathway to success in college, career and life.



### *Student, Family and Community Engagement*

The second goal, Student, Family and Community Engagement, includes these strategic objectives and outcomes:



5

**Re-envision Partnerships** – MPS cultivates and maintains mutually beneficial partnerships and collective impact efforts to maximize resources that promote greater student outcomes.



6

**Strengthen Communications Systems and Outreach Strategies** – The community is engaged in, understands and supports the work of MPS, and families choose our district as a trusted and valued education provider.

### *Effective and Efficient Operations*

The third of these goals, Effective and Efficient Operations, includes these strategic objectives and outcomes:



7

**Develop our Workforce** – As an organization respected for supporting diverse, healthy, highly skilled and engaged employees, MPS is an employer of choice.



8

**Improve Organizational Processes** – MPS is a leader in using best practices, systems and processes equitably and efficiently to align and maximize resources in support of our strategic objectives.

The Eight Big Ideas continually focus and align key Central Service's projects and initiatives. Collectively, they are the core expression of the superintendent's priorities during the 2017–18 budget development process.

## **District Strategic Plan Development**

In September 2016, the Milwaukee Board of School Directors adopted the full strategic plan for the district. For each of the Eight Big Ideas, this included defined outcome statements, key progress indicators (KPIs), lines-of-effort, and a prioritized portfolio of projects. The objectives in the Eight Big Ideas strategic plan are reinforced by the district's budget process and together ensure that key programs and projects are aligned, prioritized and funded to support positive outcomes for our students.

In the 2017–18 school year, MPS will be in year three of a five-year strategic plan process. In year one (2015–16), MPS leadership and staff developed the Eight Big Ideas aligned to the board's goals. Year two (2016–17) saw the creation and Board approval of the full strategic plan, outlined above. In year three (2017–18), we will focus our efforts on refinement and alignment of our prioritized portfolio, implementation of robust decision matrixes, and continued development of standard operating procedures (SOP). We will solidify the overall plan throughout the 2017–18 and 2018–19 biennial budget planning process, and in years four and five, will measure our progress and adjust our strategy as necessary.

### Strategic Plan Execution & Layout

Each Eight Big Ideas has a team working toward the objective’s defined outcome and related KPIs. Each objective has roughly four lines-of-effort (LOE), the pathway by which a group of related projects works toward the objective’s defined outcome. These eight strategic plan objective teams meet regularly with their respective LOE leads, maintaining forward momentum on prioritized projects. In turn, the LOE lead coordinates the projects within the LOE, ensuring complementary and coordinated efforts across projects’ activities and outcomes. Finally, every project within the portfolio is assigned a project manager, defined as the “change agent” empowered to plan and execute the project and be accountable for on-time and on-target delivery of project outputs and outcomes.

Chart 2.5 shows the strategic plan layout structure.

Chart 2.5 Strategic Plan Layout

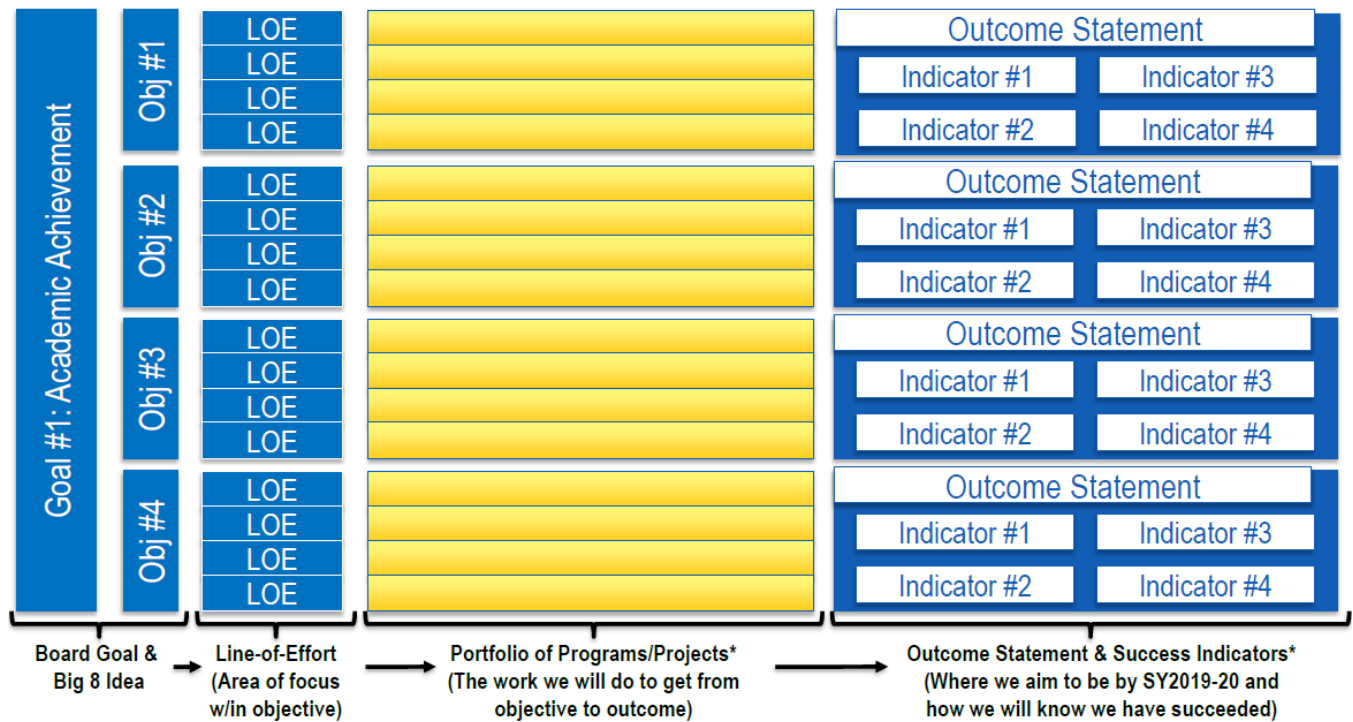


Chart 2.6 shows the strategic plan layout with the Eight Big Ideas and four LOEs, each with a defined outcome statement and four or five key indicators of progress. The 2017–2019 biennial plan is currently being updated and will be published in the amended adopted budget in the fall.

Chart 2.6 Eight Big Ideas 2016-17 Strategic Plan

MPS BOARD GOAL #1: ACADEMIC ACHIEVEMENT	LINES OF EFFORT	FY17 PORTFOLIO (programs & projects w/ defined outputs, short-term and intermediate outcomes)
OBI.1: CLOSE THE GAP (Ludvik, Howard)	<b>EQUITY, ACCESS AND OPPORTUNITY</b> (Reed)	<b>Core Programs &amp; Projects:</b> 1) Equity policy and district-wide equity education (Reed) 2) Culturally Responsive Teaching System (P. Moga) 3) Future Ready Program (N. Moga) 4) My Brother's Keeper Initiative (Watkins)
	<b>DISTRICT IMPROVEMENT PLAN IMPLEMENTATION</b> (Atkinson/Noland)	<b>Core Programs &amp; Projects:</b> 1) Reading Foundations (Kuehler) 2) Disciplinary Literacy (Campbell/McMurtry) 3) Algebra Readiness (Ford/Rodriguez) 4) Culture, Climate & Equity (See LOE 1.1) 5) Continuous Improvement System & Transformational Coaching (Atkinson)
	<b>INSTRUCTIONAL REDESIGN</b> (Smith)	<b>Core Programs &amp; Projects:</b> 1) School-based PD (Swid/Roberts) 2) Instructional Support Program (Smith) 3) Textbook, Materials and Instructional Programs Implementation (Chabran) 4) Online/personalized learning program (for intervention, recovery and acceleration) (Stewart/Hill)
	<b>SCHOOL TRANSFORMATION</b> (Hawkins)	<b>Core Programs &amp; Projects:</b> 1) SIG Implementation (cohorts 2 & 4) (Whitley) 2) Collective Impact Schools (Hawkins) 3) Transformation Network Implementation & Supports (Hawkins) 4) Turnaround Arts (Hanson)
	<b>BIUNGLING/MULTICULTURAL EDUCATION</b> (Guery)	<b>Core Programs &amp; Projects:</b> 1) Teaching for Bilingual (Guery) 2) English Language Development (Borges) 3) World Language Foundation, Design & Implementation (Badillo)
OBI.2: EDUCATE THE WHOLE CHILD (Maschi, Miller, Howard)	<b>TRAUMA SENSITIVE SCHOOLS IMPLEMENTATION</b> (Radtke)	<b>Core Programs &amp; Projects:</b> 1) SUCCESS! & PAIS (Jagermann) 2) Social-Emotional Learning Implementation (Molter/Radtke) 3) Project Resilient (Meraf) 4) Project Aware (Krug) 5) Case Management Model Development (Jagermann) 6) Comprehensive Attendance Improvement Plan (Horn/Hauser) 7) Mindfulness Implementation (Maschi)
	<b>PROMOTE HEALTHY CHOICES</b> (Barkstrom)	<b>Core Programs &amp; Projects:</b> 1) Improved Student Dining Experience (Barkstrom) 2) Farm-to-School Access (Dall) 3) Physical Health Initiatives (Pau) 4) Preventive Services Initiative (Williams)
	<b>STRENGTHEN STUDENT-TEACHER RELATIONSHIPS</b> (Nelson-Christensen/Hood)	<b>Core Programs &amp; Projects:</b> 1) Youth Frontiers (Nelson-Christensen) 2) ESCC Support to Learning Teams (Nelson-Christensen) 3) Develop a Student-Teacher Relationship Model (Birub)
	<b>EXPAND EARLY CHILDHOOD</b> (Tynes-Allison)	<b>Core Programs &amp; Projects:</b> 1) SAGE to AGR transition (Washington) 2) Early Childhood Funding Initiative (K4 All Day) (Tynes-Allison) 3) Expanding Head Start Options (Harris-Day) 4) Reinforce Admin Policy 8.53 and develop EC code of conduct (Tynes-Allison) 5) Early Childhood Literacy Development Plan (Tynes-Allison)

DISTRICT OUTCOMES & PERFORMANCE METRICS (long-term outcomes, indicators, and targets)			
Version #33, Printed: 03/20/17			
<i>MPS is a national symbol of excellence for educating all students, providing a rigorous academic program that ensures equitable opportunities for all children to reach their full potential.</i>			
<b>SUCCESS INDICATOR</b> Increased % of students proficient or above for all student groups in Reading/EIA	<b>Baseline SY15-16</b> STAR 26% WFE 18.4%	<b>Target SY16-17</b> STAR 36% WFE 25.5%	<b>Goal SY19-20</b> STAR 66% WFE 55%
<b>SUCCESS INDICATOR</b> Increased % of students proficient or above for all student groups in Math	<b>Baseline SY15-16</b> STAR 30% WFE 14.8%	<b>Target SY16-17</b> STAR 40% WFE 22%	<b>Goal SY19-20</b> STAR 70% WFE 52%
Scope: All MPS Students		Scope: All MPS Students	
Tool: STAR Spring Data, WI Forward Exam (WFE)		Tool: STAR Spring Data, WI Forward Exam (WFE)	
<b>SUCCESS INDICATOR</b> Increased % of students proficient or above for all student groups in Early Literacy	<b>Baseline SY15-16</b> STAR 51%	<b>Target SY16-17</b> STAR 61%	<b>Goal SY19-20</b> STAR 91%
Scope: MPS Students, Grades K-1		Scope: All MPS High School Students	
Tool: STAR Spring Data		Tool: ACT - Statewide	
<i>MPS provides a nurturing, consistent and validating experience for every child so that both educational and social-emotional needs are met.</i>			
<b>SUCCESS INDICATOR</b> Reduced suspension rate and reduced office discipline referrals; increased perception of safety	<b>Baseline SY15-16</b> SUSP: 11.8% ODR: 106,706 ESCC: 3.1	<b>Target SY16-17</b> SUSP: 10.5% ODR: 96,095 ESCC: 3.4	<b>Goal SY19-20</b> SUSP: 7% ODR: 64,023 ESCC: 3.7
Scope: All MPS Students		Scope: KS-6/2	
Tool: Annual avg suspension (SUSP) on SIPP's Summary Report; Office Discipline Referral data (ODR); ESCC (average on 1-4 scale how safe do you feel in the hallways of your school?)		Tool: PAIS/PAIS Español	
<b>SUCCESS INDICATOR</b> Increased student attendance rate; decreased student absenteeism	<b>Baseline SY15-16</b> 89.3% 20.8%	<b>Target SY16-17</b> 90% 10.7%	<b>Goal SY19-20</b> 93% 12.5%
Scope: All MPS Students		Scope: MPS Students GR6-12	
Tool: Superintendent's Summary Report		Tool: ESCC average on a 1-4 scale for two questions: Q1 - "I feel safe and comfortable with my teachers at school" Q2 - "My teachers treat me with respect"	

MPS BOARD GOAL #1: ACADEMIC ACHIEVEMENT	LINES OF EFFORT	FY17 PORTFOLIO (programs & projects w/ defined outputs, short-term and intermediate outcomes)
OBI.3: REDEFINE THE MPS EXPERIENCE (Wilbur, Guel)	<b>EXPAND FINE ARTS OPPORTUNITIES</b> (Joltik)	<b>Core Programs &amp; Projects:</b> 1) Development of Standards of Service & Curriculum (Joltik) 2) Expanding of Artist Educators (Craig/Salmon) 3) MPS All-City Arts Festival (Soyak) 4) Year of the Arts (Hanson)
	<b>EXPAND EXTRACURRICULAR OPPORTUNITIES</b> (Litsey)	<b>Core Programs &amp; Projects:</b> 1) Equitable Extracurriculars across all levels (Molbeck) 2) Sponsorship and fundraising initiatives (Thomas) 3) Rec facility experience enhancement (Linn) 4) Recreation Facilities Master Plan (Litsey)
	<b>REDERNE EXTENDED LEARNING OPPORTUNITIES</b> (Schroeder)	<b>Core Programs &amp; Projects:</b> 1) MPS 21 <sup>st</sup> Century CLCs (Cooper) 2) MPS Drive (Kubes) 3) Saturday Academy (Luedtke) 4) Learning Journeys Expansion (Wade) 5) Teach for America - Summer School Training Institute (C. Gordon) 6) Summer Academy Expansion (Mefer)
	<b>STRENGTHEN STUDENT CLUBS &amp; ORGANIZATIONS</b> (Williams)	<b>Core Programs &amp; Projects:</b> 1) Census of current clubs, association, and orgs (Kappelman) 2) Student/Family focus groups (Adst) 3) Development of MPS "standard" (Kubes) 4) Superintendent's Student Advisory Council (Williams)
OBI.4: RETHINK HIGH SCHOOLS (Pocky, Hill)	<b>LEADERSHIP DEVELOPMENT</b> (Ramos/Swick)	<b>Core Programs &amp; Projects:</b> 1) Leadership Pipeline Development (Bonds) 2) Learning-Focused Supervisor Training for Administration (Baez) 3) MPS University (Chastek) 4) Retention Incentives/Strategies (Maddaloni)
	<b>SCHOOL IDENTITY, CULTURE &amp; CLIMATE</b> (Mateo)	<b>Core Programs &amp; Projects:</b> 1) Develop Capacity of Principals to Create Systems of Positive School Culture (Jagermann) 2) Develop High School Identity Types (Tagliavia) 3) Establish Safe & Welcoming School Climates (Turner/Negron)
	<b>INFRASTRUCTURE &amp; SUPPORTS</b> (Shapiro)	<b>Core Programs &amp; Projects:</b> 1) Academic & Career Planning (ACP) (King) 2) 9 <sup>th</sup> Grade Academy (Shapiro) 3) Regular & Alternative Programming (Luedtke) 4) Alternative Schools (Hill/Shapiro)
	<b>COLLEGE &amp; CAREER READINESS TRANSFORMATION</b> (Radonski)	<b>Core Programs &amp; Projects:</b> 1) Career & Technical Education (Radonski) 2) AP/IB Expansion (Mallgren) 3) College & Career Success Centers (Talbert) 4) High School Checklist (Pollack)

DISTRICT OUTCOMES & PERFORMANCE METRICS (long-term outcomes, indicators, and targets)			
Version #33, Printed: 03/20/17			
<i>Every MPS school provides robust co/extracurricular experiences that engage and inspire every child.</i>			
<b>SUCCESS INDICATOR</b> Increased % of art and music positions filled by certified teachers	<b>Baseline SY15-16</b> Est. SY16-17	<b>Target SY16-17</b> Visual Art: 78% Music: 42%	<b>Goal SY19-20</b> Visual Art: 95% Music: 90%
Scope: All MPS and instrumentally by Charter Schools		Scope: MPS Elementary, Middle, High Schools	
Tool: Fine Arts Data Tracker		Tool: MPS Rec Extracurricular data compared to MPS Standard	
<b>SUCCESS INDICATOR</b> Increased % of schools achieving the district standard for club and organization offerings	<b>Baseline SY15-16</b>	<b>Target SY16-17 Standard &amp; Baseline est. SY16-17</b>	<b>Goal SY19-20</b>
Scope: MPS Elementary, Middle, High Schools		Scope: MPS KS-12 ELD Students	
Tool: Fall & Spring SY16-17 School Activities Survey, Infinite Campus Roster data SY17-18+		Tool: Exit Surveys from ELD Programs	
<i>Every MPS student graduates on time with a personalized pathway to success in college, career and life.</i>			
<b>SUCCESS INDICATOR</b> Increased 4-year graduation rate for all student groups	<b>Baseline SY14-15</b> 58.2%	<b>Target SY16-17</b> 62%	<b>Goal SY19-20</b> 70%
Scope: 4-year MPS High School Cohort		Scope: MPS 9 <sup>th</sup> Grade Cohort	
Tool: WISEDash Public		Tool: Infinite Campus	
<b>SUCCESS INDICATOR</b> Increased % of graduating seniors w/ successful completion of 1- AP/IB course; increased % of AP/IB exams passed	<b>Baseline SY15-16</b> 49.9%	<b>Target SY16-17</b> 60%	<b>Goal SY19-20</b> 75%
Scope: MPS High School Seniors		Scope: AP/IB enrolled MPS High School Students	
Tool: US Dept of Education FAFSA application data		Tool: AP/IB Pass Data (grade of D or higher) & Test Results (score of 3 or above)	
<b>SUCCESS INDICATOR</b> Increased 4-year graduation rate for NAF Academy participants	<b>Baseline SY15-16</b> 88%	<b>Target SY16-17</b> 90%	<b>Goal SY19-20</b> 92%
Scope: NAF Academy students 1.5- credits		Tool: NAF Academy data	





MILWAUKEE PUBLIC SCHOOLS

MPS BOARD GOAL #2: STUDENT, FAMILY & COMMUNITY ENGAGEMENT

LINE OF EFFORT	FY17 PORTFOLIO (Programs & projects w/ defined outputs, short-term and intermediate outcomes)
<b>ADVANCE THE MPS FOUNDATION</b> [Terrell]	<b>Core Programs &amp; Projects:</b> 1) Increase Individual Giving [Terrell] 2) Build MPS Department/School Capacity for Fund Development [Terrell] 3) Develop Grant Management System [Terrell] 4) Priority Development & Articulation [Terrell]
<b>DEVELOP BUSINESS, COMMUNITY &amp; ALUMNI PARTNERSHIPS</b> [Sigh]	<b>Core Programs &amp; Projects:</b> 1) Programmatic MOUs [Sigh] 2) Establish a system for supply drives [Sigh] 3) Data-sharing agreements & BCFP SOPs [Sigh] 4) Adopt-a-School Program [Sigh] 5) Alumni Engagement & Programming Opportunities [Williams] 6) Building School-based capacity for Partnerships [Sigh]
<b>EMPOWER FAMILIES</b> [Costello]	<b>Core Programs &amp; Projects:</b> 1) Support Family Leadership [Curley] 2) Launch Family Empowerment University [Costello] 3) Reignite family engagement in MPS High Schools [Costello] 4) Connect families to resources [Costello]
<b>EXPAND COMMUNITY ENGAGEMENT OPPORTUNITIES</b> [Harris]	<b>Core Programs &amp; Projects:</b> 1) Youth mobilization [Williams] 2) Safe Activities in Safe Spaces [Rossa] 3) Listening Sessions [Lee] 4) Wellness Wednesdays [Rossa] 5) MPS Gives Back [Harris] 6) Emergency Response Teams [Rossa] 7) Streamlining Volunteer Processes [Aschoff]
<b>BUILD STUDENT RECRUITMENT &amp; RETENTION PLAN CONNECTED TO REGIONAL DEVELOPMENT STRATEGIES</b> [Tagliavia]	<b>Core Programs &amp; Projects:</b> 1) Pre-enrollment survey/community feedback tool [Tagliavia] 2) Identify school communities and develop feeder patterns [Tagliavia] 3) Retention & Recruitment Strategies [Tagliavia] 4) Enrollment Improvement Process [Booswell] 5) 8 <sup>th</sup> Grade High School Early Admissions [Tagliavia]
<b>DEVELOP A ROBUST COMMUNICATIONS PLAN</b> [TBD]	<b>Core Programs &amp; Projects:</b> 1) Inventory/audit of communications systems [TBD] 2) Communication Plan Development & Implementation [TBD] 3) Protocols & Processes for Outreach [TBD]
<b>EXECUTE MPS BRANDING &amp; AWARENESS CAMPAIGN</b> [Callaway]	<b>Core Programs &amp; Projects:</b> 1) Brand Experience Definition & Requirements [Callaway] 2) Graphics Refresh [Kent] 3) School Marketing Plans [Callaway] 4) Building Recognition, Beautification, and Branding efforts [Luzney]
<b>IMPLEMENT MPS CUSTOMER SERVICE PLAN</b> [Sigh]	<b>Core Programs &amp; Projects:</b> 1) Improve the Customer Experience [Sigh] 2) Improve Employee Resources [Meyer] 3) Enhance Employee Recognition Program [Icard]

DISTRICT OUTCOMES & PERFORMANCE METRICS (Long-term outcomes, indicators, and targets)				
<p><i>MPS cultivates and maintains mutually beneficial partnerships and collective impact efforts to maximize resources that promote greater student outcomes.</i></p>				
<b>SUCCESS INDICATOR</b> Increased MPS Foundation funds raised	Baseline CY15-16 \$524,506	Target CY16 \$865,000	Goal CY19 \$1,000,000	<b>SUCCESS INDICATOR</b> Increased % of schools with a business partner helping to meet school goals Baseline SY2015-16 13.7% Target SY16-17 25.2% Goal SY19-20 59.5%
Scope: All funds within calendar year		Scope: All MPS Schools		
Tool: MPS Foundation Financial Reports		Tool: # of schools w/ an executed MOU for "Adopt-a-School" or "Principal Partners"		
<b>SUCCESS INDICATOR</b> Increased % of MPS alumni groups involved at their alma mater with current MPS students	Baseline SY15-16	Target SY16-17 Baseline est. SY16-17	Goal SY19-20	<b>SUCCESS INDICATOR</b> Increased % of schools with an active family organization Baseline SY15-16 15.3% Target SY16-17 40% Goal SY19-20 100%
Scope:		Scope: All MPS Schools		
Tool:		Tool: Monthly Parent Coordinator Reports		
<p><i>The community is engaged in, understands and supports the work of MPS and families choose our district as a trusted and valued education provider.</i></p>				
<b>SUCCESS INDICATOR</b> Improved public perception of MPS	Baseline SY15-16	Target SY16-17 Baseline est. SY16-17	Goal SY19-20	<b>SUCCESS INDICATOR</b> Increased % of students stay in MPS year-to-year: Head Start K3-K4 73% Head Start K4-K5 83.2% K3-K4 80.4% 5-6 86.1% 8-9 78%
Scope: Families w/ children living in Milwaukee, Milwaukee citizens, citizens in adjacent communities		Baseline SY15-16 74/70.9% ↑ 79% Target SY16-17 84.2/85.5% ↑ 89.2% Target SY16-17 81.4/83% ↑ 86.4% Target SY16-17 87.1/86% ↓ 91.1% Target SY16-17 79/79.9% ↑ 84.5%		
Tool: Community-wide survey		Scope: All MPS Schools & Students		
<b>SUCCESS INDICATOR</b> Increased enrollment	Baseline SY15-16 75,568	Target SY16-17 75,568 Actual: 76,857 ↑	Goal SY19-20 80,000	<b>SUCCESS INDICATOR</b> Increased customer satisfaction rates Baseline SY15-16 7.7* Target SY16-17 7.7 Goal SY19-20 8.0
Scope: All MPS Schools & Students		Scope: MPS Families, Community Members, Business Partners, Employees and Students		
Tool: Annual Fall 3 <sup>rd</sup> Friday enrollment counts		Tool: Net Promoter score, currently used by Customer Service [0-10 scale to assess customer loyalty by 9-10 considered good]		
<b>SUCCESS INDICATOR</b> Increased #% of positive MPS-related stories in the media	Baseline SY15-16	Target SY16-17 Baseline est. SY16-17	Goal SY19-20	<b>SUCCESS INDICATOR</b> Scope: All MPS-related media stories Tool: Google Analytics + Media Plan Metrics



MILWAUKEE PUBLIC SCHOOLS

MPS BOARD GOAL #3: EFFECTIVE & EFFICIENT OPERATIONS

LINE OF EFFORT	FY17 PORTFOLIO (Programs & projects w/ defined outputs, short-term and intermediate outcomes)
<b>CREATE CAREER PATHWAYS &amp; STAFFING PIPELINES</b> [Maddaleni]	<b>Core Programs &amp; Projects:</b> 1) Promotion/Hiring Process Revision [Maddaleni] 2) Workforce stabilization [Permy-Wright] 3) Expanded PD & MPS University [Berlin/Chastek] 4) Aspiring Leaders Program [Maddaleni]
<b>CULTIVATE EMPLOYEE WELL-BEING</b> [Witt]	<b>Core Programs &amp; Projects:</b> 1) Wellness On Site [Witt] 2) Onsite Clinics & Benefit Addition Roll-out [Brandt] 3) Career & Wellness Week [Chastek]
<b>EFFECTIVELY IMPLEMENT EMPLOYEE EVALUATION SYSTEMS</b> [Lamothe/Engelbart]	<b>Core Programs &amp; Projects:</b> 1) Non-rolling Employee Evaluation System [Lamothe] 2) e-Performance [Engelbart] 3) Establish timeline/calendar and tracking process [Lamothe/Engelbart] 4) Compensation policy development [Engelbart]
<b>STRENGTHEN DIVERSITY &amp; INCLUSION</b> [Moroney]	<b>Core Programs &amp; Projects:</b> 1) Pipeline/Recruitment efforts targeting diversity [Maddaleni] 2) Employee Resource Groups [Moroney] 3) Employee Culture Assessment [Witt] 4) Equity policy development and education [Gorton]
<b>ALIGN INFRASTRUCTURE</b> [Gordon]	<b>Core Programs &amp; Projects:</b> 1) Develop a district-wide strategic plan [Peterson] 2) Contract Management & Performance [Sodaghan] 3) Update and Execution of Facilities Master Plan [Luzney] 4) Transportation Alignment [Solik-Fifarek]
<b>ESTABLISH PROJECT MANAGEMENT CAPABILITIES THROUGHOUT THE ORGANIZATION</b> [Peterson]	<b>Core Programs &amp; Projects:</b> 1) Implement culture of project management [Peterson] 2) Establish an integrated performance measurement system [Peterson] 3) District-wide grant management protocol [Kreitzman]
<b>CREATE STANDARD OPERATING PROCEDURES &amp; UTILIZE DECISION MATRICES</b> [Saller]	<b>Core Programs &amp; Projects:</b> 1) District-wide SOP protocols [Reiter/Saller] 2) Contracted school processes [Bronnagh/Anderson] 3) Development of work process and product accreditation [Perkins]
<b>IMPROVE TECHNOLOGY INTEGRATION &amp; UTILIZATION</b> [Meyer]	<b>Core Programs &amp; Projects:</b> 1) IFA5 and PeopleSoft replacement [Meyer/Parkhy/Gordon] 2) Enterprise licensing alignment [Rehitz] 3) Increased network bandwidth and capacity [Meyer] 4) Learning Management System [Roberts]

DISTRICT OUTCOMES & PERFORMANCE METRICS (Long-term outcomes, indicators, and targets)				
<p><i>As an organization respected for supporting diverse, healthy, highly skilled and engaged employees, MPS is an employer of choice.</i></p>				
<b>SUCCESS INDICATOR</b> Increased retention in 2 & 5-year teacher and staff cohorts (Baseline pop. 10,832)	Baseline SY15-16 2yr/5yr 83%/63%	Target SY16-17 2yr/5yr 84%/64%	Goal SY19-20 2yr/5yr 86%/66%	<b>SUCCESS INDICATOR</b> Increased diversity of teacher workforce (% of total recruitments) Baseline SY15-16 DL: 13% Target SY16-17 DL: 17% Goal SY19-20 DL: 21%
Scope: All MPS Employees		Baseline SY15-16 WHR: 10% AS: 3% WHR: 70% AC: 1% Net Spec: 3% Target SY16-17 WHR: 15% AS: 3% WHR: 64% AC: 1% Net Spec: 2% Goal SY19-20 WHR: 18% AS: 3% WHR: 57% AC: 1% Net Spec: 2%		
Tool: HRMS Data		Tool: HRMS Data		
<b>SUCCESS INDICATOR</b> Increased % of employees participating in wellness programs and benefits & improved perception of wellness.	Baseline SY15-16	Target SY16-17 Baseline est. SY16-17	Goal SY19-20	<b>SUCCESS INDICATOR</b> Increased % of classified employees receiving an on schedule evaluation Baseline SY15-16 School Admin: 50% Teachers: 43% Target SY16-17 School Admin: 76% Teachers: 43% Goal SY19-20 School Admin: 80% Teachers: 50%
Scope: All MPS Employees		Scope: School-based educators and leaders		
Tool: Workplace Wellbeing Questionnaire, "employee care" and "organizational respect" metrics		Tool: MIP DASYS (EQ)		
<p><i>MPS is a leader in using best practices, systems and processes equitably and efficiently to align and maximize resources in support of our strategic objectives.</i></p>				
<b>SUCCESS INDICATOR</b> Increased % of documented accreditation (department/work process/product)	Baseline SY15-16	Target SY16-17 Baseline est. SY16-17	Goal SY19-20	<b>SUCCESS INDICATOR</b> Increased % of documented standard operating procedures (SOPs) in all Offices Baseline SY15-16 Target SY16-17 Goal SY19-20
Scope: All Offices		Scope: All Offices		
Tool: Accreditation Data		Tool: MPS System Data		
<b>SUCCESS INDICATOR</b> Increased % of \$ savings through process improvement efforts	Baseline SY15-16	Target SY16-17 Baseline est. SY16-17	Goal SY19-20	<b>SUCCESS INDICATOR</b> Increased % of district technology resource usage by staff and students Baseline SY15-16 Target SY16-17 Goal SY19-20
Scope: Designated Annual Projects		Scope: All MPS Employees & Staff		
Tool: IS Data & Evaluation Data		Tool: Technology Data		
<b>SUCCESS INDICATOR</b> Improved employee satisfaction	Baseline SY15-16	Target SY16-17 Baseline est. SY16-17	Goal SY19-20	<b>SUCCESS INDICATOR</b> Scope: All MPS Employees Tool: Workplace Wellbeing Questionnaire, "work satisfaction" metric



## 2016–17 Strategic Plan Project Accomplishments

With nearly one year of full strategic plan implementation, Milwaukee Public Schools (MPS) establishes progress and achievement in its three Milwaukee Board of School Directors' goal areas. We are proud of these accomplishments and continue to push forward with our strategy for continual progress toward our outcomes.

### ACADEMIC ACHIEVEMENT

- 1 **Equity Framework:** The MPS Equity Commission finalized a framework for school culture, and began drafting a comprehensive, district equity policy.
- 2 **Professional Development:** A six week school-based professional development (PD) cycle was implemented, giving schools more of a stake in their PD.
- 3 **Bridging the Digital Divide:** The district increased our Advanced Placement telepresence course enrollment from 30 students in 2015-16 to 175 in 2016-17.
- 4 **District Support to Teachers:** The district conducted 5,906 classroom walk-throughs, leading to over 100 guaranteed supports provided to schools.
- 5 **Credit Recovery:** Credit recovery course completion has increased 34% from 2015-16 to the current school year.
- 6 **World Languages:** A two-year world languages graduation requirement was adopted by the MBSD.
- 7 **Early Childhood Classrooms:** More than 230 K5 and grade 1 early childhood classrooms were refreshed with child-friendly furniture and developmentally appropriate materials.
- 8 **Innovative Arts Initiative:** Via the *Fill the Gaps* initiative, the district entered into 49 contracts to provide art services to students enrolled in schools with art teacher vacancies.
- 9 **MPS Drive:** We proudly launched year one of MPS Drive, serving 373 students (through January 13, 2017) who achieved a 97 percent pass rate on the *Department of Motor Vehicles* temporary permit test.
- 10 **Saturday Academy:** 630 students participated in our *Saturday Academy* credit recovery and accelerated courses to date.
- 11 **Summer Academy & Freshman Bridge:** Increased our 2016 *High School Summer Academy* student participation from 568 in 2015 to 1,580 in 2016. Prepared 2,116 students for 9th grade via our Freshman Bridge program.
- 12 **Alternative Programs:** Enrollment in GEDO #2 programs grew from a year-end total of 320 students in 2014-15 to 665 students as of as of March 2017.
- 13 **College & Career Access:** The number of individual visitors to the College & Career Centers climbed from 1,695 (2015-16) to 2,454 as of March 2017.
- 14 **Advanced Placement:** Twelve MPS high schools now offer five or more Advanced Placement (AP) courses, with our AP Capstone Diploma expanded to five high schools.
- 15 **Workforce Development:** In collaboration with community partners, expanded and formalized a culinary arts program at four MPS high schools, with hundreds of students enrolled.
- 16 **Classroom Technology:** Our high schools achieved a 1:1 ratio of Chromebooks-to-students this school year, with 64,000 Chromebooks total used by students across the district.



## STUDENT, COMMUNITY & FAMILY ENGAGEMENT

- 17 Foundation Support:** The MPS Foundation received donations and grants totaling approximately \$900,000 and awarded \$2,000 to teachers for classroom grants. \$40,000 supported scholarships for students.
- 18 Parent Leadership:** Increased average attendance of our parent District Advisory Council to 76 participants, up from average of 53 at end of 2015-16.
- 19 Family Outreach:** Three Family Forums reached more with a combined 550+ total attendees, and graduated over 25 families from the *MPS Families as Partners Institute*, an eight-week training.
- 20 Branding Improvements:** A new district-wide branding campaign launched, including marketing plan development with 29 schools.
- 21 Community Impact:** Via the \$1.3M MPS C.A.R.E.S. initiative, launched a Midnight Sports League at Bradley Tech with several community partners; 130 young men ages 17-25 participated in the inaugural season.
- 22 Beyond the Classroom:** Via the MPS C.A.R.E.S. initiative, opened Twilight Centers at six high schools serving 18,574 youths to date.
- 23 Customer Service:** The district created MPS Welcome Centers at two geographically dispersed high schools to provide families with customer-friendly service and equitable access to the district.
- 24 Enrollment Increases:** Exceeded our student enrollment target, increasing student enrollment two percent from 75,568 (2015-16) to 76,857 (2016-17).

## EFFECTIVE & EFFICIENT OPERATIONS

- 25 Professional Learning:** MPS University was established and began cohorts for reading, special educational, and building engineer licensing extension programs.
- 26 Leadership Development:** The inaugural Aspiring Leaders Program was launched to identify, train and support future principals and assistant principals.
- 27 Strategic Recruitment:** Several goals were met including, increased employee recruitment, establishing contacts with historically black colleges and universities, attending national job fairs, and building relationships with teacher pipelines in Puerto Rico, Spain, and Mexico.
- 28 Strategic Planning:** The board approved strategic plan was implemented and staff were aligned to further build out and ensure day-to-day execution of district project work toward defined outcomes.
- 29 Digital Transformation:** To increase collaboration, conduct process improvement, and better support schools, the district implemented the project management tool Smartsheet throughout Central Services.
- 30 Learning Management System:** A vendor was selected for the HRMS/FIS system, which will include a robust Learning Management System with a targeted start date of September 2017.



## Strategic Business, Community, District and Family Partnerships

Milwaukee Public Schools is an integral part of Milwaukee and we constantly strive to build and maintain community partnerships. These connections enable us to maximize resources while drawing upon the extensive knowledge of experts who help us improve our services. We have hundreds of successful partnerships.

Planning is under way for our **Year of the Arts** celebration which will commence at the start of the 2017–18 school year. This MPS and Cre8MKE collaborative campaign will raise awareness of, reflect upon, draw connections to and build support for arts education assets and resources in Milwaukee Public Schools. Year of the Arts activities will include: a student logo design competition, launch celebrations, release of a local study on arts education, the creation of a Year of the Arts plan at every MPS school, a citywide student/family passport to the arts, professional development to increase teachers' knowledge of creative thinking strategies, a continued spotlight on our Turnaround Arts schools and a culminating arts education festival!

**MPS C.A.R.E.S.** provides resources to meet a variety of community needs, including but not limited to creating safe spaces for youth, providing opportunities for residents to inform district decisions, mobilizing MPS employees to volunteer and addressing community-wide emergencies. Programming includes the following:

- Twilight Centers/Safe Zones
- Youth Empowerment
- Wellness Wednesdays
- MPS Gives Back
- Community Listening Sessions
- MPS Presence in Milwaukee Community
- Emergency Response Team

And, thanks to our partnerships with the **Milwaukee Bucks, Running Rebels, Milwaukee Fire and Police Commission, Milwaukee Police Department, Safe & Sound and the City of Milwaukee**, MPS C.A.R.E.S. launched a free midnight basketball league for young men this spring. This initiative will provide a safe space for league participants while integrating elements to help them improve their lives, including mentoring, career development and life skills.

Milwaukee Public Schools is fortunate to partner with many dynamic businesses, organizations and foundations that help improve student achievement, engage our families and help develop staff. We continue to pursue partnerships to positively affect learning outcomes at our schools. **M<sup>3</sup>** is a partnership among Milwaukee's three largest public educators, Milwaukee Public Schools, Milwaukee Area Technical College and the University of Wisconsin–Milwaukee, which work together to increase the retention, graduation and career success of all students from K–12 through postsecondary education. **M<sup>3</sup>** will create a roadmap that leads to a seamless transition from high school to higher education and careers by marshalling the resources of the three largest education entities to positively impact Milwaukee.

The **District Multilingual Multicultural Advisory Committee** was created as a result of the Bilingual Resolution adopted by the Milwaukee Board of School Directors in April 2014. The Bilingual Resolution tasks MPS with a

continuation of its commitment to bilingualism as well as the promotion and maintenance of language immersion, dual language and heritage programs. Membership comprises teachers, parents and community members.

The support of the **GE Foundation**, through a \$20.4 million grant, is creating model schools where best practices can be studied and replicated by other MPS schools. Initially focused on Common Core implementation, GE Foundation Schools are models for collaborative learning and cooperation. Several GE Foundation Schools, including Franklin Pierce Elementary, are making remarkable progress. Knowing that it takes more than competency to realize career and college ambitions, GE now supports MPS in developing “employability skills” among students and establishing school-based College and Career Centers across the district.

Milwaukee Public Schools works closely with **Milwaukee Succeeds** to identify opportunities for Milwaukee’s children from pre-school through college. MPS is working with Milwaukee Succeeds on a pilot program focused on foundational reading skills for students and teacher coaching at Gwen T. Jackson and Clarke Street elementary schools. Early findings show encouraging results and promising growth in students participating in the program.

The **Westlawn Choice Neighborhood Initiative** includes the City of Milwaukee and the Housing Authority of the City of Milwaukee which were awarded a \$30 million Choice Neighborhoods Implementation Grant to transform Westlawn and the surrounding neighborhood into an inclusive community of opportunity with quality housing, schools, businesses, services and amenities where people want to live, learn, work, shop and play. Milwaukee Public Schools was selected as the lead education partner for this initiative with the goals of ensuring that every child is prepared to excel in school and to transform four neighborhood schools – Browning, Kilbourn, Kluge and Carmen Northwest – into high-performing schools with strong ties to the neighborhood.

MPS is continuing to work closely with the Bartolotta Restaurants and the Wisconsin Restaurant Association to expand implementation of **ProStart**, a national, two-year program that prepares high school students for promising careers in the restaurant and food service industry. The SURG Restaurant Group has also committed its support for the program. Students receive real-world, hands-on experience to build culinary arts and management skills. Through a unique partnership, the Bartolotta are s providing expertise in planning for facility renovations, assistance with fundraising and equipment acquisition, teacher training, and recruiting chef-mentors to assist teachers in the classroom.

The **Panasonic Foundation** partners with public school districts and their communities to break the links between race, poverty, and educational outcomes by improving the academic and social success of ALL STUDENTS: ALL MEANS ALL! In June 2015, the foundation selected to partner with Milwaukee Public Schools. Over the last two-years, Panasonic Foundation leaders and senior consultants have made site visits to MPS to meet with staff, board members and others to deepen their knowledge and understanding of the work in Milwaukee.

Each year, there are two institutes that bring together Panasonic partnership districts from across the country. Additionally, each partnership district designs an “at-home” institute as a means of broadening opportunities for district and school staff to engage in the focus of the partnership.

Generally, the institute is planned to provide participants with opportunities to hear nationally renowned educational reformers, interact with stakeholders from at least seven other districts, work on team development and, most importantly, work together as a district team for 12-13 hours in facilitated sessions to concentrate on the locally identified achievable results.



## District Budget Development

Budgeting is the process of setting financial and enrollment goals, forecasting future financial resources and needs, monitoring and controlling income and expenditures, and evaluating progress toward achieving the district's goals. Detailed budget planning allows MPS to maximize instructional opportunities for children while ensuring prudent use of resources.

In June 2013, the Milwaukee Board of School Directors (MBSD) adopted a resolution encouraging long-range financial planning for departments and schools, coinciding with the state's biennial budget beginning in fiscal year 2015–16. Wisconsin state statutes limit the board to adopting an annual budget.

The district-wide budget development process is a multi-year collaborative process involving many stakeholders including students, school governance councils (SGC), families, school leaders, learning teams, central services personnel and chiefs of every office, task forces, community stakeholders, the superintendent and the MBSD.

The budget preparation process begins each year in August with the review of performance indicators and continues through June with the adoption of the budget by the MBSD. In the fall, the Department of Financial Planning & Budget Services within the Office of Finance works with the superintendent's senior team and with school leaders and program coordinators to make any programmatic and budget changes necessitated by enrollment changes or other developments.

During the winter, school and department budget carousels were held with each school leader and department head. These carousels were hosted by the superintendent, Office of Finance and Office of School Administration and identified progress, challenges, current capacity to address those challenges, and school and department resource needs. All traditional, alternative and instrumentality charter schools participated in the budget carousels. The participants included the school leader, school support teacher and parent coordinator from each school.

From these discussions and feedback and community surveys (introductory clause), recommendations for infrastructure changes and the need to repurpose existing resources, roles and activities emerged that will improve technical assistance and centralized support to schools.

This winter, separate school facility carousel meetings were held in February and March 2017. The facility carousel meetings - hosted by the Chief Operating Officer, Office of Finance, Office of School Administration and the Office of Chief of Staff - addressed communication and collaboration on facility matters, adequacy of school facilities for instruction programming and priorities for facility repairs and improvements. The participants included the school leader, building engineer and parent coordinator from each school.

A growing body of research has found that school facilities can have a profound impact on both teacher and student outcomes. As a result these conversations are starting to play a more prominent part of the budget development process. Without adequate facilities and resources, it is extremely difficult to serve large numbers of children with complex needs. As such, data collected from these sessions, along with feedback gathered through school walk-throughs will further inform the education maintenance budget, long-range facility master plan and capital funding plan.

While some of the details vary for the adoption of each district budget, Chart 2.7 depicts the budget timetable.

Chart 2.7 Budget Development Timetable

FY18 and FY19 Biennial Budget Timetable	
<p><b>August–December</b></p> <ul style="list-style-type: none"> <li>• Discuss the budget timetable, potential parameters, new programs, school changes and initiatives to be considered when preparing budget recommendations.</li> <li>• Collect a variety of inputs, ideas and costs with analysis of their impact for budget planning.</li> <li>• Collect stakeholder input into the development of the budget.</li> </ul>	<p><b>September–October</b></p> <ul style="list-style-type: none"> <li>• Strategic Planning and Budget Committee discusses and takes action on the proposed budget timetable and discusses potential parameters, new programs and initiatives to be considered.</li> <li>• Publish approved budget development timetable.</li> <li>• Revise budgets for central services and schools for the current year based on actual enrollment and identify future funding needs.</li> </ul>
<p><b>October</b></p> <ul style="list-style-type: none"> <li>• Action by the board on amendments to the adopted budget for the current fiscal year based on updated enrollment and revenue data.</li> <li>• Transmittal of the amended adopted budget to the Milwaukee Common Council by the board clerk.</li> <li>• Finalize next-year enrollment projections.</li> </ul>	<p><b>November–December</b></p> <ul style="list-style-type: none"> <li>• Committee on Student Achievement and School Innovation meeting to discuss and take action on potential FY18 school changes.</li> <li>• School funding priority recommendation.</li> <li>• Collect cost-to-continue information.</li> <li>• Human resource carousels are held.</li> </ul>
<p><b>December</b></p> <ul style="list-style-type: none"> <li>• Discuss the district’s five-year financial forecast, strategic plan progress and board action on budget timetable and parameters.</li> <li>• Administration reviews current programs and funding levels and the school allocations for establishing school-based budgets.</li> </ul>	<p><b>January</b></p> <ul style="list-style-type: none"> <li>• Discuss budget process and preliminary allocations.</li> <li>• School budget carousels are held.</li> <li>• Preparation of proposed office budgets.</li> <li>• Revise enrollment projections based on early enrollment results.</li> </ul>
<p><b>February–March</b></p> <ul style="list-style-type: none"> <li>• Preparation, with input from their school governance councils, of proposed school budgets.</li> <li>• Office budget carousels are held.</li> <li>• Optional facility carousels are held.</li> </ul>	<p><b>April</b></p> <ul style="list-style-type: none"> <li>• Compilation of the Superintendent’s Proposed Budget by the Department of Financial Planning &amp; Budget Services.</li> <li>• Release of the Superintendent’s Proposed Budget.</li> </ul>
<p><b>May</b></p> <ul style="list-style-type: none"> <li>• Public hearings on proposed budget.</li> <li>• Statutory public hearing notice published.</li> <li>• Statutory hearing on proposed budget.</li> <li>• Board members submit and take action on possible amendments to the proposed budget.</li> </ul>	<p><b>June</b></p> <ul style="list-style-type: none"> <li>• Board takes action on proposed budget.</li> <li>• Board clerk transmits adopted budget to the Milwaukee Common Council.</li> </ul>
<p><b>June–July</b></p> <ul style="list-style-type: none"> <li>• Review performance indicators and use the results to inform operational performance.</li> </ul>	<p><b>Ongoing</b></p> <ul style="list-style-type: none"> <li>• Plan, organize and coordinate the development, preparation, presentation, implementation and evaluation of the district’s budget.</li> <li>• Listening sessions and public input opportunities</li> <li>• Collect online stakeholder feedback on the budget and budget process</li> </ul>

Communication and collaboration carousels will be held with contracted schools and programs in May and June to strengthen the partnership with contracted vendors running MPS schools and programs.

In addition to the carousel process, the district website provides an ongoing opportunity for the community to solicit information and provide feedback on the budget and budget process. A property tax insert provides a call-in number and email address for Milwaukee residents to ask questions and provide feedback on the MPS budget. And finally, strategic planning institutes facilitated by the Panasonic Foundation allow the board members, the administration and other stakeholders to concentrate on continuous improvement efforts.

The superintendent is using many different vehicles to solicit and act upon feedback from staff and the community. Some of these methods are principal, teacher and student advisory groups that work directly with the superintendent's office. The District Advisory Council is made up of parent representatives from all of the schools, and meets monthly with district staff. These sessions provide individuals with an opportunity to learn more about and provide feedback on the progress toward the Eight Big Ideas, as those efforts form the basis of the superintendent's budget recommendations. This work will provide input into the district's continuous improvement efforts and continue to inform budget priorities.

### ***Gaining Commitment to Pay for MPS Budget Priorities***

The district's budget process adhered to several critical budgeting principles aligned to the district's vision, mission and core beliefs. These included the following:

#### **Education priorities should drive the budget.**

The budget intentionally reflects the most current strategies for providing a world-class education to learners.

#### **We must get high academic return on investment (A-ROI).**

We all must aspire to make a practical connection between academic and financial decision-making and to get the most impact for our limited resources.

#### **There is no substitute for long-term stability, predictability and continuity.**

Student progress cannot be made when there are constant disruptions and when teachers and school communities do not know what resources to expect from one year to the next. Strategic financial planning is absolutely critical to achieving this stability. Budget and budget priorities are linked to the district's new strategic plan which serves as a long-term financial and educational blueprint. As a district we do not want to make decisions that appear to be capricious or always reactive to what is happening around us; we intend to follow our plan.

#### **School budget decisions should be based on what is best for students.**

Kids should be first, but adults still matter. We must be mindful of how decisions impact adult stakeholders, recognize the consequences, and seek to remediate ill-effects and preserve or restore a sense of safety and pride among adults.

**Budget a better way to using effective tactics to diffuse stress associated with cost-saving strategies.**

We must use data to understand our trends; make contingent decisions; increase certainty around the district and individual school priorities vs. supplemental activities; and plan for the long-term.

**Build school allocations with a lens to procedural justice.**

Decisions are based on accurate information. A transparent and consistent set of decision-making criteria are applied to everyone equally. All stakeholders are given the opportunity for input. Differences between school size, program and student needs is evaluated and supported with available resources. Mistakes are recognized and corrected.

**Create an inspiring future.**

Progress is being made. We will encourage focus on a small set of goals that are achievable that can be pursued by all staff and stakeholders immediately. *Results change conversations and resources.*

***Budget Constraints***

All activities are influenced by the federal and state budget process, budget constraints that may vary from year to year and changes in employee compensation. The Department of Financial Planning & Budget Services has the primary responsibility for planning, organizing and coordinating the development, preparation, presentation and evaluation of the district's biennial budget planning process and execution.

Revenue is not keeping pace with inflation, leaving the district with limited ability to cover increased costs and meet the MPS vision. Meeting the vision is challenging within an environment of stagnant revenues, growing educational options, increased need for quality programming aimed at serving Milwaukee's diverse student population and a desire to regain public confidence that the school district can provide students with a quality education.

The proposed budget for 2017–18 is balanced. A balanced budget is one in which authorized expenditures for the School Operations Fund match the projected revenues. The district's total projected revenue for 2017–18 is \$1.2 billion. The proposed budget 2017-18 reflects an overall reduction in spending of \$21.0 million, or 1.8 percent, from the 2016-2017 budget. The reduction is reflecting the fact that the 2016-17 budget included borrowing in the construction fund which is not included in the proposed budget for 2017-18. Projected revenues in the general operations budget are virtually unchanged at a 0.3 percent increase over 2016-17.



Stable revenues are not enough to sustain the district's operations as they are today. Modest inflationary pressures require growing revenues. The district also faces more significant inflationary pressure in medical costs and other employee benefits. Planning for 2017-18 has required careful reductions and reorganization efforts to effectively support the strategic plan while maintaining the fiscal health of the district.

The total proposed budget - which includes grant funding and funding for Milwaukee Recreation - is \$1,176,129,642, down from \$1,197,098,961 in 2016-2017.

It is more important than ever for us to prioritize our spending toward the outcomes we have collectively identified as critical, using the voices of our stakeholders and our strategic roadmap to determine where and how we spend public dollars in service of students.

As with other Wisconsin public school districts, MPS receives its revenue from four major sources:

- State aid—State aid is funding that MPS receives from the state and is paid directly to the district. The amount of state aid is estimated by the Department of Public Instruction (DPI) in July and the amount is certified in October.
- Property taxes—The portion of total revenue that comes from local property taxes varies widely across Wisconsin's school districts, due largely to the way the equalization aid is distributed. MPS does not estimate the local property taxes until DPI provides an estimate of the district's equalization and other aids that impact the tax levy.
- Federal aid—Most federal aid to schools comes through three channels: Individuals with Disabilities Education Act (IDEA), Elementary and Secondary Education Act (ESEA) or through distribution formulas and competitive grants. MPS's federal aid will be approximately 17 percent of its total 2017-18 revenue.
- Local sources—Another source of school funding comes from grants, borrowing, local fees, interest earnings and gifts. Additional sources of local non-property tax revenue include tuition from student learning options (open enrollment tuition, intergovernmental agreements and rental revenues for the use of school facilities). MPS will receive approximately two percent of its 2017-18 revenue from local sources.

Public funding is the primary financial resource for the district, but private funding is necessary to provide quality supports for Milwaukee's children. The district is dedicating increased time and energy to cultivating partnerships and participating in a funder's collaborative to identify ways to match interested community investors with MPS student needs.

**Student enrollment** is a major factor in determining the state revenue. Lower enrollment, along with legislative action regarding the revenue limits, leads to lower state revenues for the district. The current year's fall enrollment was down less than one percent than the enrollment from two years prior. This is in contrast to the decade prior to 2012, when the enrollment dropped by 14 percent.

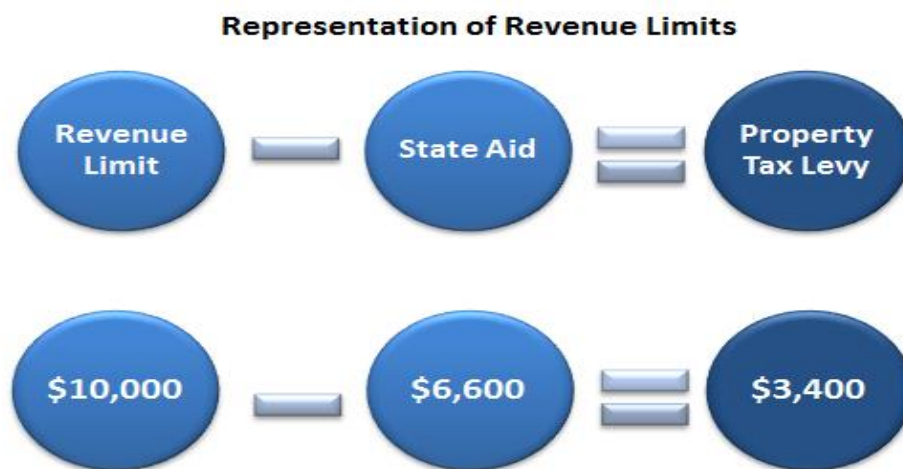
**Competition from private schools and non-MPS charter schools** contributes heavily to the district's enrollment challenges. Private school enrollment in Milwaukee—stimulated by the Milwaukee Parental Choice Program (MPCP)—grew from 25,270 students in 2004 to 36,383 students in 2017. Non-MPS charter schools have also played a role in enrollment competition.

**Revenue limits** are a key issue for MPS. The purpose of Wisconsin’s revenue limit is to restrict the amount of revenue a school board can raise annually from local property taxes and state general school aids.

On October 15 of each year, DPI certifies MPS’s general school aid amount for the current school year. The difference between MPS’s revenue limit and the October 15 general aid figure, less MPS’s computer aid eligibility, determines the maximum amount of revenue that MPS is allowed to raise through the property tax levy. Under revenue limits, resources come from either general aid or the property tax levy to fund MPS spending. If additional general aid funding is provided, the property tax levy can be reduced by a corresponding amount. If general aid funding is reduced, school boards have the authority to “backfill” the aid reduction by increasing the property tax levy up to the revenue limit.

Chart 2.8 is a visual representation of the method for determining a Wisconsin school district property tax levy.

*Chart 2.8 Representation of Revenue Limits*



\*Please note taxes vary with home values, and numbers shown are examples.

District-wide personnel costs are projected to be \$759.4 million, which is 64.6 percent of the total proposed budget and is the district’s largest expense. The fringe benefit rate used for school and department budgets increased from 48.3 percent in 2015–16 to 50.2 percent in 2017–18.

The district will continue its efforts to reorganize and align departments with their core functions while reducing duplicative efforts. Positions will continue to be re-purposed, dropped or in some cases added to address critical needs identified in operational planning. School-based budgeted staff will decrease by 188.68 FTEs. There are 96.3 teaching positions reduced throughout the district, but will not result in lay-offs due to vacancies and turnover. Although the district added many educational assistant positions last year, many of these positions could not be filled; as a result many schools have right-sized their educational assistant budget.

To preserve resources for instruction and support services to children, the district is leaving the **construction tax levy** at a reduced level for a second fiscal year. The Construction Fund decrease is due to the inclusion of \$28.5 million in borrowing in 2016-17. While borrowing for energy conservation projects is being planned for 2017–18, it is not included in the spring proposed budget because several related factors are yet to be determined.

An **increase in the extension fund** is needed to accommodate the first full year of MPS C.A.R.E.S. implementation. While categorical resources are up in total, the increase is due mainly to the use of carryover funds. The district is managing 2016–17 spending to preserve resources for the upcoming fiscal year.

The proposed budget is a balanced budget in 2017–18 as expenditures for the School Operations Fund are authorized at a level to match the projected revenues. Specific financial strategies and plans to support the Milwaukee Board of School Directors' goals are described in the Financial section, as is the district's long-term financial plan.

### *Statutory Budget Requirements*

Wis. Stat. § 65.90 sets forth the following requirements for formulating an annual budget.

1. Publish a notice with the location, date and time for the public hearing.
2. Hold a public hearing at which time residents of the district have an opportunity to comment on the proposed budget.
3. Certify and adopt the budget after the public hearing and no later than the meeting in which the district sets the annual tax levy amount.

## **Basis of Budgeting/Budgetary Control**

The district's annual budget is prepared and adopted on a modified accrual basis of accounting consistent with generally accepted accounting principles in the United States of America, except for the treatment of encumbrances and property tax revenues. Annual unencumbered appropriations lapse at fiscal year-end, while property tax revenues are budgeted based on the amount levied.

In accordance with DPI's reporting requirements, the board exercises control over budgeted amounts at the responsibility center level within the School Operations, School Nutrition, Extension and Categorical Funds. The capital projects funding is controlled at the project level. Additional budgetary control is maintained through the encumbrance of estimated purchase amounts prior to the release of purchase orders to vendors. Purchase orders exceeding available budgetary balances are not released until additional funds are identified to cover any deficit.

During the year, the budget can be amended only by approval of a majority of the members of the board. As a management practice, the superintendent, or his/her designee, may transfer funds between functions at the department, school or program level, subject to the following criteria:

- The transaction does not exceed an annual accumulated amount of \$100,000
- It is not initiated by a board member
- It will not effectuate a change in policy
- The transaction will not create a new area of activity for the district
- It does not increase authorized staffing levels
- The change does not move monies between statutory funds

Department-, school- and program-level budgets are considered a management control and planning tool and, as such, are incorporated into the accounting system of the district. Administrative policy requires all annual appropriations lapse at year-end, except for the following: excess budgetary authority for capital projects funds lapse when a specific project is completed, schools may be allowed to automatically carry over a maximum of 1.0

percent of the total revised school budget, year-end deficits incurred by schools shall be carried over into the next year, and special projects or planned purchases can be carried into the subsequent year with board approval. Additionally, at year-end, both encumbrance and budgetary authority necessary to offset the encumbrance may be automatically carried over to the next year. Annual board approval for carryover of encumbrances is not required.

### **Consolidated Fund Summary**

The MPS budget is composed of revenues and expenditures in five different funds. Chart 2.9 provides an explanation of the different funds.

*Chart 2.9 District Fund Descriptions*

<b>District Fund Descriptions</b>	
<b>Statutory Funds</b>	<p><b>School Operations (General) Fund</b> The School Operations Fund is the general operating fund for MPS. The fund is used to report all financial resources not accounted for and reported in another fund. It is composed of two taxing entities: general and debt.</p> <p><b>School Nutrition Services Fund</b> The School Nutrition Services Fund is an enterprise fund, used to account for services supported primarily through service charges and used to account for the breakfast, lunch and other meal programs operated by the district for students.</p> <p><b>Extension Fund</b> The Extension Fund is used to record financial transactions related to recreational activities and is jointly managed by the Office of Operations, Office of Finance and Office of Academics.</p> <p><b>Construction Fund</b> The Construction Fund is used to account for and report financial resources that are restricted, committed or assigned to expenditures for the acquisition or construction of capital facilities and the additions to and remodeling of existing buildings.</p>
<b>Non-Statutory</b>	<p><b>Categorically Aided Programs Fund</b> The Categorically Aided Programs Fund is used to account for proceeds from federal, state and private grants that fund social and curriculum needs of special populations within the district. MPS uses the term “Categorical” funding to refer to all grant resources, and these terms are used interchangeably.</p>
<b>Fiduciary Funds</b>	<p><b>Employee Pension Plans</b> MPS is the trustee, or fiduciary, for its employees' pension plans. As such, the district is responsible for ensuring that the assets reported in these funds are used for their intended purpose.</p> <p><b>Other Assets</b> MPS is the trustee, or fiduciary, for other assets that—because of a trust arrangement—can be used only for their intended purpose.</p>



## Governmental Fund Types

Chart 2.10 District Fund and Reporting Entity Structure

District Fund and Reporting Entity Structure						
✓ indicates a reporting entity has spending in a certain fund type		Fund Type				
		School Operations	Nutrition Services	Extension	Construction	Categorical
Reporting Entity	Schools	✓				✓
	Other School Accounts	✓				✓
	Offices:					
	<i>Academics</i>	✓		✓		✓
	<i>Board Governance</i>	✓				✓
	<i>Board of School Directors</i>	✓				
	<i>Chief of Staff</i>	✓		✓		✓
	<i>Finance</i>	✓				✓
	<i>Human Resources</i>	✓				✓
	<i>Innovation and Information</i>	✓				✓
	<i>Operations</i>	✓	✓	✓	✓	✓
	<i>School Administration</i>	✓				✓
	<i>Superintendent</i>	✓		✓		✓
	Other Accounts	✓	✓	✓	✓	

### Fund Balance

Governmental fund equity, or fund balance, refers to the difference between assets and liabilities under the modified accrual basis of accounting for governmental funds. MPS has implemented Governmental Accounting Standards Board (GASB) Statement Number 54 employing terminology and classifications for fund balance items according to the following classifications: non-spendable, restricted, committed, assigned or unassigned.

**Non-spendable fund balances** include amounts that cannot be spent because they are either not in spendable form or must be kept intact for legal or contractual reasons. This classification includes inventories, prepaid amounts, assets held for sale and long-term receivables.

**Restricted fund balances** limits the use of these resources and are either externally imposed by creditors (such as through debt covenants), grantors, contributors or other governments or are imposed by law (through constitutional provisions or enabling legislation).

**Committed fund balances** are amounts that can be used only for specific purposes because of a formal action (resolution) by the government's highest level of decision-making authority. Fund balance amounts are committed through a formal action of the district. The formal action must occur prior to the end of the reporting period, but the amount of commitment, which will be subject to the constraints, may be determined in the subsequent period. Any changes to the constraints imposed require the same formal action of the district that originally created the commitment.

**Assigned fund balances** are amounts that are constrained by MPS's intent to be used for specific purposes but that do not meet the criteria to be classified as restricted or committed. Intent can be stipulated by the governing body, another body or by an official to whom that authority has been given.

The district, by resolution, has given authority to the district's chief financial officer to determine which of the fund balances are intended to be restricted even if conventional criteria would not apply. With the exception of the School Operations Fund, this is the residual fund balance classification for all governmental funds with positive balances.

**Unassigned fund balance** is the residual classification of the School Operations Fund. Only the School Operations Fund reports a positive unassigned fund balance. Other governmental funds might report a negative balance in this classification as the result of overspending for specific purposes for which amounts had been restricted, committed or assigned. The district considers restricted amounts to be spent first when both restricted and unrestricted fund balance is available, unless there are legal documents/contracts that prohibit doing this, such as in grant agreements requiring dollar-for-dollar spending. Additionally, the district would first use committed, then assigned and, last, unassigned amounts of unrestricted fund balance when expenditures are made. Fiduciary fund equity is classified as held-in-trust for employee benefits.

Board policy 3.03 (Operating Reserve) regarding use of unassigned (unreserved) fund balance is as follows:

*Use of the unreserved fund balance shall require a two-thirds majority vote of the board and shall not impair interim financing (cash-flow borrowing) arrangements.*

## Financial Management

The board and administration have adopted policies and procedures that ensure effective and efficient use of the district's financial resources. Authorization, recording and custodial activities are performed in accordance with legal and regulatory requirements and are annually reviewed by an external auditor. MPS also maintains a robust internal audit function that reports directly to the Milwaukee Board of School Directors and is dedicated to performance and financial auditing activities in the district.

### *Basis of Accounting*

The district's financial records are maintained on a modified accrual basis of accounting, except for the fiduciary funds (private purpose trust and pension trust funds). Accordingly, revenues are recognized when measurable and available, expenditures when goods or services are received, liabilities when incurred and receivables when a legal right to receive exists.

### *Basis of Fund Accounting*

The diverse nature of governmental operations and the necessity of ensuring legal compliance preclude recording and summarizing all governmental financial transactions in a single accounting entity. Therefore, from a financial management viewpoint, a governmental unit is a combination of several distinctly different accounting entities, each having a separate set of accounts and functioning independently of each other. Each accounting entity is assigned to a separate "fund." A fund is defined as a fiscal and accounting entity with a self-balancing set of accounts recording cash and other financial resources, together with all related liabilities and residual balances,

and changes therein, which are segregated for the purpose of carrying on specific activities or attaining certain objectives in accordance with special regulations, restrictions or limitations.

The fiduciary funds, wherein MPS has responsibility for private or employee pension assets, can be used only for the trust beneficiaries. These activities are excluded from government-wide statements because MPS cannot use these assets to finance its operations. They are not part of the annual budget for the same reason.

### ***Encumbrance Method of Accounting***

The board's School Operations (General) Fund also uses the encumbrance method of accounting. Under this method, the district commits funds to an unperformed contract, such as purchase orders, and records the expenditure when a liability is incurred for goods received or services rendered. When the actual expenditure takes place, the accounts are adjusted for any difference between the actual expenditure and the commitment previously recorded. Any outstanding commitments at the end of the fiscal year are reserved in the School Operations Fund balance. Generally unexpended or unencumbered appropriations terminate at year-end and are not available for use in subsequent periods.

### ***Summary of Other Significant Accounting Policies***

The financial statements of MPS are prepared in conformity with accounting principles generally accepted in the United States of America as applied to government units. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles. The significant accounting principles and policies used by the district are described below.

#### ***Reporting Entity***

The reporting entity for the district is based upon criteria set forth by GASB Statement Number 14, *The Financial Reporting Entity*. Under this pronouncement, the financial reporting entity consists of (a) the primary government, which is controlled by a separately elected governing body, is legally separate and is fiscally independent; and (b) organizations for which the primary government is financially accountable. All of the accounts of the district comprise the primary government.

#### ***Basis of Presentation Government-wide and Fund Financial Statements***

The statement of net position and the statement of activities present financial information about MPS as a whole. The statements include all funds of the district, except that the fiduciary fund and the effect of inter-fund activity have been eliminated from the government-wide financial statements. The fund financial statements provide information about the district's major governmental funds, including fiduciary funds, on a separate reporting basis. All remaining governmental funds are aggregated and reported as non-major governmental funds.

#### ***Property Taxes***

The aggregate amount of property taxes to be levied for school purposes is determined according to Chapter 120 of the Wisconsin Statutes. Property taxes for the district are adopted by the board by early November and are certified to the City of Milwaukee for levy and collection. The district's property taxes are levied annually prior to December 31 of the calendar year. They are administered by the City of Milwaukee for the district based on the assessed (taxable) values as of January 1 of that calendar year and are recognized as district revenue in the fiscal year they are levied. The levy becomes a lien against property on January 1 of the calendar year.

## Financial Policies

The policies and procedures below are provided to demonstrate the district's commitment to careful use of the funds in meeting its mission. MPS policies can be found on the district's website under MPS > District > School Board > Policies & Procedures.

### *Annual Operating Budget (3.01)*

#### (1) GENERAL

(a) The superintendent of schools shall prepare an annual operating budget for the Milwaukee Public Schools consistent with state statutes, Department of Public Instruction regulations, and district policies and goals.

(b) The purpose of the annual operating budget is to identify adequate financial resources for the educational programs and to provide a basis for accountability in fiscal management.

(c) A budget shall be required for every fund that the school system utilizes in its yearly operation. The funds available for the various school programs are as follows:

- School Operations Fund (includes School Nutrition Fund)
- Construction Fund
- Extension Fund
- Categorical Programs

(d) The fiscal year shall be July 1 through June 30.

(e) The Committee on Strategic Planning and Budget shall consider and make recommendations to the board on all matters pertaining to budget development and control.

#### (2) BUDGET DEADLINES AND SCHEDULES

(a) The following deadlines have been established by law:

1. Annually before adopting its budget for the next fiscal year and at least five days before transmitting its completed budget, the board shall hold a public hearing on the proposed budget.
2. At least one week before the public hearing, the board will publish a notice of the public hearing.
3. The board shall transmit its completed budget to the Common Council on or before the first Monday in August of each year on forms furnished by the auditing officer of the City of Milwaukee.

(b) Copies of the proposed budgets shall be furnished to each board member before the public hearing on the proposed budget is held.

(c) The administration shall consider budget preparation a year-round process and shall establish a budget calendar which shall present a plan of action for estimating and completing preparation of the annual budget in a fixed period. The calendar shall also be used as a guide for coordinating the budgetary activities, collecting budget data, and making budget decisions.



### ***Budget Control (3.02)***

(1) The superintendent, or his/her designee, shall prepare monthly reports and periodic forecasts for the appropriate committee and the board relative to the status of the budget.

(2) Annual expenditures shall be controlled on the basis of the total funds allocated for each school, program, department, office or other special accounts. Expenditures for student transportation, employee benefits, and district insurances shall be controlled on the basis of the total appropriation for each of these budgets. The accounts funded under special and contingent funds shall be controlled by line item.

(3) It is expected that district-wide expenditures will not exceed the amount of funds allocated. In the event that a deficit occurs, efforts shall be made to expedite a fund transfer to fully offset the deficit. Year-end deficits that are not offset shall be carried over to the next fiscal year.

(4) The superintendent, or his/her designee, shall be authorized to implement expenditure controls for the purpose of ensuring that expenditures do not exceed projected revenues. The revised budget revenue estimates and the expenditure controls implemented shall be reported to the appropriate committee and the board no later than the month following effectuation of the expenditure controls.

(5) The authorization of positions shall reside with the board, except as modified by Administrative Policy 6.19. The superintendent shall report staffing levels exceeding budget authorizations and the monetary impact to the appropriate committee and the board on a monthly basis.

### ***Operating Reserve (3.03)***

#### **(1) CONTINGENT FUND**

The Contingent Fund shall be established by the board and the amount reviewed and approved annually with the adoption of the budget. The following guidelines shall govern transfers from this fund.

(a) Transfers from this fund should be limited to the following types:

1. costs that could not have been reasonably anticipated and/or taken advantage of opportunities;
2. expenditures appropriate for a one-time funding source;
3. expenditures made necessary as a result of an emergency situation.

(b) Further, all transfers from this fund should be identified in the fiscal impact statement as discretionary or obligatory.

(c) A recorded affirmative vote of two-thirds of board members present shall be necessary for the earmarking of an amount in, or the use of money in, the Contingent Fund.

#### **(2) UNASSIGNED FUND BALANCE**

(a) Use of the unassigned fund balance shall require a two-thirds majority vote of the board and shall not impair interim financing (cash-flow borrowing) arrangements. Fund balance is a critical factor in the district's financial planning and budget process. The board will strive to maintain a fiscally responsible fund balance.

(b) A sufficient fund balance shall be maintained in order to

- avoid excessive borrowing;
- accumulate sufficient assets to make designated purchases or cover unforeseen expenditure needs; and
- demonstrate financial stability and therefore preserve or enhance the district's bond rating, thereby lowering debt issuance costs.

### ***Fund Transfer (3.04)***

#### **(1) FUND TRANSFERS REQUIRING BOARD APPROVAL**

The appropriate committee and the board shall consider fund transfer requests submitted by the administration. The approval of the board shall be required for transfers

- (a) initiated by a board member;
- (b) exceeding \$100,000 within any office or program budget annually on a cumulative basis;
- (c) exceeding \$100,000 between departments, programs, schools or special accounts;
- (d) involving changes in policy;
- (e) creating a new area of activity for the district;
- (f) increasing authorized staff levels;
- (g) made between statutory funds; and
- (h) involving the district Contingent Fund.

#### **(2) FUND TRANSFERS AUTHORIZED BY THE ADMINISTRATION**

(a) All other fund transfers shall be authorized, as appropriate, by the superintendent or his/her designee. The superintendent shall report transfers to the appropriate committee and the board in the meeting cycle following such action.

(b) The board clerk/director of the Office of Board Governance and the managers of the Office of Accountability and Efficiency shall have the same transfer authority within their areas of operations.

#### **(3) SCHOOL FUND TRANSFER AUTHORITY**

The school principal, or administrator of an alternative school, shall have authority to make line-item adjustments in the school budgets within authorized funding for the fiscal year.

#### **(4) AVERAGE-TO-ACTUAL SALARY ADJUSTMENTS**

The superintendent, or his/her designee, shall be authorized to effectuate budget transfers for the purpose of revising fiscal year budget allocations to reflect funding adjustments from average salaries to actual salaries for budgets based on average salaries. These fund transfers shall be reported to the appropriate committee and the board within 60 days following effectuation of the transfers.

**(5) CONTRACTUAL PAY ADJUSTMENTS**

The superintendent, or his/her designee, shall be authorized to effectuate fund transfers from the “unallocated salaries” account to the appropriate projects to adjust budgets for negotiated pay raises. These fund transfers shall be reported to the appropriate committee and the board no later than 60 days following effectuation of the transfer.

**(6) ENROLLMENT GROWTH AND TEACHER RESERVE FUNDS**

(a) Per-pupil funding shall be provided to schools that increase their enrollments, up to the amount of funding budgeted for unallocated seats. The superintendent, or his/her designee, shall be authorized to effectuate fund transfers between the “enrollment growth” and the “teacher reserve fund” accounts and the school budgets as necessary for the purpose of adjusting school staffing to the appropriate level.

(b) Monies remaining in the enrollment growth and teacher reserve fund accounts may be used by the superintendent in his/her discretion to support board goals. These transfers shall be reported to the appropriate committee and the board no later than 60 days following effectuation of the transfer.

**(7) CONTINGENT FUND**

The earmarking of an amount in, or the transfer of money from, the Contingent Fund shall require a recorded affirmative vote of two-thirds of the board members present at the board meeting at which the action is taken.

***Fund Carryover (3.05)*****(1) ENCUMBRANCES**

At year end, both the encumbrance and the budgetary authority necessary to offset the encumbrance may be automatically carried over to the next year. Annual board approval for carryover of encumbrances is not required.

**(2) CATEGORICAL PROGRAMS**

Unspent funds and unrealized revenues at year end may be automatically carried over to the next fiscal year so that spending can continue until the end of the categorical program period. Unspent funds should lapse at the end of the program period. Annual board approval for carryover of categorical program appropriations at year end is not required.

**(3) CAPITAL PROJECTS**

Excess budgetary authority for capital projects may be carried over from one year to the next. Annual board approval is not required. Savings generated upon project completion or non-completion may be applied to other project needs upon board approval.

**(4) OPERATING FUNDS**

(a) School Deficits. Year-end deficits incurred shall be carried over into the next year. If a school incurs a deficit in excess of 3.0 percent of the total revised school budget, the superintendent shall submit a report to the board relative to the cause and future impact of school deficits.

(b) Office Surpluses. Carryovers for special projects or planned purchases may be allowed on the basis of written justification. Annual board approval for carryover of office surpluses is required.

(c) School Surpluses. Schools may be allowed to automatically carry over a maximum of 1.0 percent of the total revised school budget each year, without written justification or board approval. Requested carryover amounts in excess of the maximum may be allowed with board approval. Contracted school programs are not subject to this policy requirement.

(d) District Deficit. The amount of any projected deficit should determine the extent of the reduction/elimination of carryovers. The following apply if the district projects a year-end deficit:

1. First, office carryovers for special projects or planned purchases should be denied.
2. Second, a plan shall be prepared and submitted for board approval detailing how any deficit in excess of the office carryovers for special projects or planned purchases will be eliminated.
3. Third, automatic school carryover amounts may be eliminated with board approval.

### ***Fiscal Accounting and Reporting (3.06)***

#### **(1) RESPONSIBILITY**

The superintendent shall be responsible for properly accounting for all funds of the Milwaukee Public Schools.

#### **(2) MONTHLY REPORTS**

The superintendent, or his/her designee, shall prepare monthly reports and periodic forecasts for the board concerning the status of the budget.

#### **(3) ACCOUNTING SYSTEM**

The accrual basis of accounting shall be utilized for the Milwaukee Public Schools.

#### **(4) PAYDAY SCHEDULE**

All personnel employed regularly, either full or part-time, shall be paid bi-weekly. Paydays shall be determined annually and published in the school calendar.

#### **(5) PAYROLL REPORTS**

In compliance with state statutes, the superintendent, board president or their designee shall furnish the city comptroller with a complete list of payroll claims.

#### **(6) DEBT LIMITATIONS**

The board shall not in any one year contract any debt or incur any material expense greater than the amount of the school funds subject to its order.

#### **(7) REVENUES FROM INVESTMENTS**

The board authorizes the Department of Public Instruction to deposit the school district's equalization aid directly into the local government pooled investment fund in order that the city and/or district may derive additional interest earnings.



**(8) DEPOSITORY OF FUNDS/AUTHORIZED SIGNATURES**

(a) All funds received by or raised in the city for use by the public schools shall be paid over to the city treasurer and shall be disbursed by the treasurer on the written order of the president of the board and the superintendent countersigned by the auditing officer of the city. Any check drawn on board funds shall require the signatures of any two of the following—superintendent, and chief financial officer or his or her designee—before it may be disbursed by the city treasurer.

(b) The board shall designate certain banks as public depositories for individual school funds, and the administration shall name the persons who will be authorized to sign checks drawn on these funds.

**(9) EXPENSE REIMBURSEMENTS**

The reimbursement of actual, necessary and reasonable costs incurred by employees and members of the board while on authorized business shall be made in accordance with the district’s Travel Policies and Procedures Manual.

**(10) FIXED ASSET MANAGEMENT**

(a) All Milwaukee Public Schools sites are required to maintain fixed asset inventory records in accordance with the district’s Fixed Asset Manual. The Office of Finance shall make the Fixed Asset Manual available online in the district’s financial management system.

(b) A “fixed asset” is defined as furniture and equipment with a useful life greater than one year and an initial cost of \$5,000 or more. In addition, portable technology such as computers, laptops, printers, televisions, fax machines, digital cameras, camcorders, cell phones and iPads are to be recorded as fixed assets for internal tracking purposes, regardless of cost, for risk management purposes.

(c) Fixed-asset data must be updated and entered into the district’s financial management system within thirty (30) days of receipt. A separate file is to be maintained that contains all documentation relating to the acquisition and disposal of the assets for each fiscal year.

(d) The building administrator, school leader or office chief is responsible for the security and proper usage of all assets under their control.

**(11) DISTRICT FINANCIAL STANDARDS**

Operating financial standards should be followed in accordance with the district’s School Accounting Manual (SAM).

**(12) WRITE-OFF OF UNCOLLECTIBLE ACCOUNTS**

(a) Accounts receivable are deemed uncollectable after all collection procedures have been conducted without results.

(b) All accounts deemed uncollectible shall be written off prior to fiscal year-end. Accounts that are deemed uncollectible may be written off periodically during the fiscal year, if it is deemed necessary to do so.