
MICHIGAN SCHOOL BUSINESS OFFICIALS STRATEGIC PLANNING

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2 MATERIALS

<https://www.msbo.org/msbo-certification-class-materials/>

COURSE PRESENTER DON A. BALL PHD

- Director, Operations, Transportation and Facilities South Lake Schools
- BA Law Enforcement/Security Management, MA Organizational Management and PhD in Organization and Management
- Current College Professor with Northwood University and Franklin University
- 27 years in K-12 School Districts in the State of Michigan

COURSE ELEMENTS

4 A STRATEGIC PLAN HELPS A DISTRICT ACHIEVE ITS MISSION AND GOALS.

- Learn to identify short and long term, goals in all areas of school district management.
- Explore the development of strategic, financial goals by examining current research, best practices, and datasets.
- Budget creation to meet goals
- Learn how to facilitate the strategic planning process
- Assist in the implementation, monitoring, reporting, evaluation, and revision of a strategic plan.

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POLLING #1 QUESTION – PLEASE LIST YOUR DISCIPLINE IN THE DISTRICT?

- Operation Directors?
- Business Managers?
- How Many Years of experience do you have?



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SCHOOL DISTRICT STRATEGIC PLAN

- Make Sure you have a copy of your district's strategic plan.

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SCHOOL DISTRICT'S STRATEGIC PLANNING

- What is strategic planning at the School District Level?

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SCHOOL DISTRICT STRATEGIC PLAN

- Every School District has a strategic plan
- This outlines what the district wants to accomplish over the next 3 to 5 years. It aligns all the district deliverables.

9 WHAT ARE THE ELEMENTS OF A STRATEGIC PLAN

- Strategic Plans have the following elements:
 - Vision Statement
 - Mission Statement
 - Core Values
 - Goals
 - Sub Goals
 - Measurements

- Make sure Strategic Goals are aligned with Board Agenda Items

II WHAT ARE THE MISSION AND VISION STATEMENTS?

- What are your districts Mission and Vision Statements? Please post in the chat area
- Does your department have a mission statement? Please post in the chat area

WHAT ARE GOALS?

- Goals and their elements are specific and measurable.
- For Finance and Operations there should be specific goals to support the departments.

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HOW TO DEVELOP STRATEGIC GOALS

- K-12 School District Goals are driven by different groups;
 - The Michigan Department of Education
 - The Local School Board
 - School Groups (Athletic, Band, Theater, Unions, PTA)
 - The Community
- For the Strategic Goals to work, there needs to be input by all these groups

14 DEVELOPMENT OF STRATEGIC GOALS

- Looking at your school district strategic plan;
 - Are there specific goals for facilities and business services?
 - Example:
 - Is there a Specific Goal for Facilities?
 - Is there a Specific Goal for Business Services
- All the projects and day to day operations should align with the goal in the district strategic Plan. This way when the board approves the project, it is aligned with the strategic plan and provides value to the plan and the project.

SHORT TERM AND LONG-TERM GOALS

- Learn to identify short and long term, goals in all areas of school district management.

PLANNING TIMELINES

- Short Term: Planning cycle for Summer Work (September to March) depending on order. Funding is either through General Fund or Sinking Fund. For summer of 2023, you should already have projects lined up and in the approval process.
- Long Term: 3 to 5 years. Funding is either through General Fund or Bond money. The important element is when your district will do a bond renewal. What will it look like?
- Post Examples in the Chat

OPERATIONS/BUSINESS STRATEGIC PLANNING PROCESS

- Where do you start?
 - What are the needs for the district?
- What does it look like?
 - Speak with all the building principals. Have them provide you a list of what their needs are.
- What do you want it to be?
 - Take all the requests and organize them by building. Prioritize them and then cost them out.
 - Computerized Maintenance Management Systems are good for tracking costs and issues.



TIMELINES

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- This information does not reflect current circumstances:

Equipment	Prior to Pandemic	Current
Boilers	6 month planning	Upto 1 year
Roof Top Units	3-6 Months	Upto 1 year
Electrical Switchgear	3-6 Months	6 months or more
Roofing	1 year	Upto 2 years
Electrical Panels	3-6 Months	Upto 12 months
Trucks Through MIDeal	3-6 Months	Maybe 18 months
Flooring	3 months	3-6 Months
Paint	Off the shelf	depends

PROACTIVE OR REACTIVE

- Proactive: Routine Maintenance, building surveys, and planning
- Reactive: equipment breakdowns, failing to maintain, roof leaks and normal wear and tear

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POLLING #2 - PROACTIVE OR REACTIVE?

- Are you being Proactive or Reactive?

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WHAT DO YOU USE TO TRACK MAINTENANCE AND SERVICE REQUESTS

- As part of your planning process, how do you track maintenance requests?
- What are your priorities based on your staffing? What goes to the top and what is a lower priority?
- Are you using the maintenance system to track your costs?



COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM

- Maintenance Direct/Schooldude/Brighly/Siemans
- FMX
- MaintainX
- FIIX
- Asset Essentials
- Redlist
- eWorksOrders
- Champs
- TheWorxHub
- Azzier CMMS
- Emaint CMMS

GROUP DISCUSSION

- In your groups, share the following with your colleagues
 - (a) What does your planning cycle look like? Is it Proactive or Reactive
 - (b) Do you use a Computerized Maintenance System?
 - (c) Does the system do more than track your Work Orders?
 - (d) Do you use a Reservation system for school activities?

- What can you share from your group discussions?

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- Okay, we have the next year's list of projects, what is next?
 - Where do we find the funding for it?
 - Timeline?

DEVELOPMENT OF FINANCIAL GOALS

- Unfortunately, there is not a pot of gold.
- Depending on your district, your per student funding is 9500 to 11000. 80% or 7,600 is used on salaries and benefits. This leaves about 1,900 for services (gas, electric, repairs, transportation) and classroom support.

FUNDING SOURCES

- General Fund
- Sinking Fund
- Millage
- County Wide Millage
- Performance Contracting
- ESSER Funding

- General Fund would have a line item for building and site. This is funding set aside for summer projects and repairs.

29 FUNDING SOURCE: SINKING FUND

- Sinking Fund is an additional millage set aside for projects. There are specific areas that Sinking Funds can be used for. Please visit [Sinking Fund – MSBO](#) for the confirmed uses.

- Millage/bond are passing as renewals in some areas. Rather than going out for a new millage, there is a renewal put on the ballot.

3 | FUNDING SOURCE: COUNTY WIDE MILLAGE

- Over the last 5 years, county ISD's have included Enhancement Millage as part of the funding for local districts. These are passed on a formula to determine what amount each district is provided.
- This funding source can be used for any purpose. Remember, there is a sunset on the millage unless it is reapproved by the electors in the county.

FUNDING SOURCES: PERFORMANCE CONTRACTING

- Performance contracting has been used over the last 25 years for fund projects based on the savings from the upgrades that are provided through new equipment provided in the agreement. Check the MSBO Website for the presentation on this.

FUNDING SOURCE: ESSER FUNDS

- Elementary and Secondary Emergency Relief Programs Governor's Emergency Education Relief Programs (ESSER)
- This funding source is from the Federal Government and came in two programs: ESSER I and ESSER 2
- Further information is found at the federal and State websites and on the MSBO website
 - [Federal Funds – MSBO](#).

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- Who needs to be in the meetings?
 - If it is a regular meeting (Non-bond) then who will be there?
 - These should be weekly meetings
 - Bond/Construction Meetings?
 - The architects, construction managers, department heads, and Director of operations.

REPORTING

- Cabinet Level Reporting
 - These meetings are to update the Cabinet level personnel.
- Board Meeting Reporting
 - This reporting is done through board briefs and as appropriate at board meetings.
- Community Reporting
 - This can be done at the board meeting, separate meetings with community groups, on the District Website and at each of the buildings

DISTRICT PRIORITIES

- What are the priorities for the District?
- Energy Savings
- Improve infrastructure
- Staffing

- How do you support the reporting of information to Cabinet, the Board and the Public?
- What information is required by these groups?
- How much Information is released?

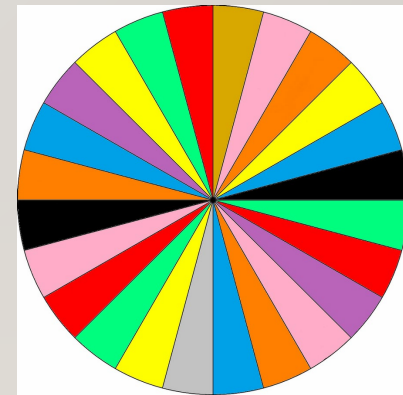


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BREAK



When we
return, we'll
spin the
wheel for a
gift card
prize!



- What can you share from your group discussions?

RESEARCH BASED DECISION MAKING

- Explore the development of strategic, financial goals by examining current research, best practices, and datasets.



- Over the last 3 years, K-12 education as we have known it has evolved into a more technology-based process.
- Short Term is upgrading networks.
- Long Term is upgrading networks and support.

- Where do you find best practices?
 - Starting point is the MSBO Website
 - www.msbo.org
 - Industry publications
 - Sharing information

DATA SETS

- The numbers are what make it work. The Data sets available include and are not limited to:
 - School District annual budget information
 - Student count and information
 - Per pupil allowances
 - Student Projects by outside agencies
 - The Economy

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- For Strategic Planning, How often do you review progress?
 - Every 30 or 90 days?
 - What if there is a problem?
 - Can Implementation get stalled?

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- There will be times when Strategic Plans will be revised;
 - The Goals have been met
 - The Goals are changed to reflect changes in regulations, funding, or programs
 - Input from the Community

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- MSBO Website – www.msbo.org
 - MSBO Certification Programs
 - [MSBO Certification Program – MSBO](#)
 - Certification on Demand MSBO
 - [Certification on Demand - MSBO](#)

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ANY
QUESTIONS?



CONTACT INFORMATION

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STRATEGIC PLANNING RESOURCES

- Cook, Ph.D., William J., *Strategic Planning for America's School*, (1995)
- Sanaghan, Ed. D., Patrick, *How to Implement Your Campus Strategic Plan A Practitioner's Guide*, (2021)

NEW PROCESS: THE MSBO EVALUATION IS YOUR RECORD FOR ATTENDANCE.

PLEASE COMPLETE BY FEBRUARY 2

- ✓ Receive an email from survey monkey for the MSBO evaluation. Your evaluation will be your record for attendance.
- ✓ Receive e-mail from MOECS-noreply@michigan.gov to fill out an evaluation for SCECHs.