

Merrett R. Stierheim, Superintendent of Schools

**SUBJECT: REPORT ON PROPOSED CHANGES TO THE K-12 SCHOOL ALLOCATION PLAN**

**COMMITTEE: BUSINESS AND FINANCIAL SERVICES**

The **K-12 School Allocation Plan**, the official handbook of all K-12 allocations, is the standard for determining how school staffing and materials, equipment, and supply allocations will be determined. Over a span of twenty-eight years, the **K-12 School Allocation Plan** has grown significantly, incorporating authorized changes, in the context of the existing fiscal year budgetary restraints or conditions. The **K-12 School Allocation Plan** is comprised of both formula-driven and special allocations.

The objective of the **K-12 School Allocation Plan** is to provide standardized guidelines to K-12 school administrators for staffing their schools, which it has done efficiently. However, over a span of many years, the impact of many of the allocations has resulted in some unintended inequities.

As a result, I appointed a sixty-six (66) member task force to address the current school site personnel allocation system and its impact and implications for all District schools. This represents the first comprehensive review of the plan. Dr. Ralph G. Lewis, Executive Assistant, Strategic Initiatives, was appointed chairperson, along with Dr. Ruby Johnson, Business Director, ACCESS Center 4, and Ms. Mary Lee Snipes, Executive Director, School Budgets, Office of Budget Management as vice-chairpersons to coordinate the review process. A complete list of participating representatives can be found on pages 10 – 12 of the attached detailed report.

The assignment was to review current practices and make recommendations for improving the delivery of instructional programs, support services, and opportunities to students through improved distributions within existing resources to all schools. Any changes to the plan had to be cost neutral. Thus, the two predominant concerns before the district pertaining to K-12 school allocations are as follows:

- The staffing needs of all K-12 schools are increasing, and the prevailing budgetary circumstances cannot match these needs.
- Can the budgetary value of the 2002-03 **K-12 School Allocation Plan** be redirected to effect more equitable support for all K-12 schools?

The attached report provides more details on the review process and the recommended changes to the Allocation Plan. A matrix of such changes can be found on pages 16–29 of the attached report.

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To facilitate current budget development activities and initial staffing activities scheduled for May 12 – May 30, recommended changes will be utilized to develop the 2003-04 proposed budget for school-sites. In addition, changes will be included in the 2003-04 Annual Budget Plan which will be provided to the Business and Financial Services Committee at its June meeting, consistent with past practice. I would like to thank Dr. Lewis, Dr. Johnson, Ms. Snipes, and the entire 66 member task force for their time and effort. The recommended changes to the allocation plan reflect the best thinking of this diverse and talented group.

RECOMMENDED: That The School Board of Miami-Dade County, Florida accept the report of proposed changes to the **K-12 School Allocation Plan**.