

Dick Maxwell, Joel Roscoe & the Public Finance Resources Team

Present



Financial Benchmarking & Analytics for School Leaders

PFRs “Financial Benchmarking & Analytics for School Leaders” is a day-and-a-half workshop jam-packed with learning, discussion, and your district specific data in a multi-year format to analyze and work through.

Discover your district’s financial story and learn how to effectively message it. Get to know:

- *What’s going on with your student population and the kids you are serving?*
- *What’s been happening to your staffing levels year-over-year, and how does that compare to your peer districts in the state?*
- *Are your finances sustainable, and what’s been going on with your per pupil expenditures year-over-year?*
- *Do you understand your taxpayer base and what type of levies might be more appealing to them?*
- *What is it costing you to maintain your buildings, and how does that compare?*
- *What are your “sound bites” – the things you are doing right and your stakeholders should know about?*
- *And what public data are your naysayers seeing and using?*

Next Workshop Dates:

December 6 & 7, 2017

March 27 & 28, 2018

Superintendent & Treasurer Team Registration is \$1,295

Location:

Question Conference Center
8405 Pulsar Place, Columbus, Ohio 43240

Lodging Options:

Fairfield Inn & Suites - (614) 568-0770
9000 Worthington Road, Columbus, Ohio 43082

Hampton Inn & Suites - (614) 885-8400
8411 Pulsar Place, Columbus, Ohio 43240

Four Points by Sheraton - (614) 844-5888
8505 Pulsar Place, Columbus, Ohio 43240



**mention "Quest" for reduced rates when making reservations*

Presenters:

Dick Maxwell . Joel Roscoe
Matt Bunting . Ryan Ghizzoni . Stacy Overly . Mike Sobul . Ernie Strawser

Agenda

Day 1 – Evening [5:00pm – 8:30pm] *Dinner provided*

Indicator **Is your district’s budget sustainable?** In this session you will receive key financial ratios, indicators and explanations. You will also receive the one-page PFR ‘School Budget Report Card,’ resource composition and resource trends. This session is designed to solidify your financial forecast believability factor.

Benchmark **What are your district’s costs?** Your district’s detailed expenditure report will be reviewed, explained and analyzed. Answering questions such as: How do costs compare? How much is your district spending? Why are your costs different? How has your district responded to economic distress and uncertainty?

Day 2 – All Day [8:00am – 4:00pm] *Breakfast & lunch provided*

Indicator **Who is your district serving?** You will be provided with enrollment trends and strategic enrollment ratios. Additional data will be provided to analyze special needs, incoming and outgoing students.

Benchmark **How have staffing levels changed?** A historical FTE trend will be provided that overlays enrollment and staffing. Important salary and benefit ratios will be discussed and reconciled to similar districts.

Benchmark **What are your instructional cost ratios and results?** Your district’s cost allocation will be compared to similar districts alongside performance ratios.

Strategy **Which strategies have the most impact on your district’s budget?** The data provided in this session will help answer the affordability question and service level versus resources provided. What challenges must be addressed, and which budget or revenue resources will have the most impact?

Indicator **Who is your community?** This data will help you to see your community’s changes. Identifying median age, income, occupation, and assessing educational interest are all important to understanding your community better. Your district’s taxpayer effort will be reviewed, compared, and explained.

Strategy **What revenue strategies are viable?** In this session we will cover the types of levies and their potential impact on your district. Clues on levy amounts and duration will be used to determine how long a levy might last. Local taxpayer investment ratio will be explained.

Strategy **How does the data impact your message?** We’ll develop a three-point data impact plan for your parent-taxpayer community. Educational materials and timelines will be developed to meet your goals.

Seminar Deliverables:

- Customized binder with your district’s historical and current benchmark data
- PFRs School Financial Report Card
- Limited class size
- Seven qualified presenters, with Superintendent and Treasurer experience
- Small group breakout sessions with review, analysis and individual consultation
- Printed and electronic versions of all customized reports and data
- Strategic communications and messaging of the data tips