



Board Presentation
June 4, 2024

APS Planning Factors Study Final Recommendations



Our Topics for Today

- Fall work and findings
- Design Team work and recommendations
- Positions that the Design Team did not vote on
- Process for future planning factor reviews and updates



The work to revise the APS planning factors started in Fall 2023 with a comparative analysis to peer divisions and division-wide stakeholder engagement

Project Objective: Revise the APS school staffing formulas (“planning factors,” PFs) to more effectively and equitably serve all students

Planning Factors Comparison Analysis

- 5 Peer Divisions: Alexandria City, Fairfax, Falls Church, Loudoun, Prince William
- How much does APS invest in positions through its PFs?
- How does this compare to the PFs of SOQs and peer divisions?
- How does this compare to state and national organizations’ benchmarks and best practices?

Stakeholder Engagement

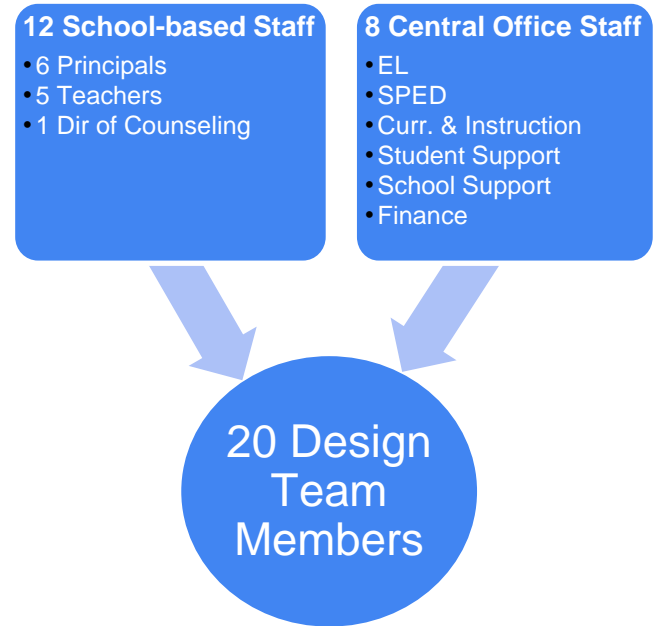
- What is working and not working with the PFs?
- Interviewed and validated findings with division subject matter experts across relevant central office departments
- Visited 3 schools (elementary [ES], middle [MS], high [HS]) and held focus groups with teachers and principals from 16 schools
- Interviewed leaders of Advisory Council on Teaching & Learning, Arlington Special Education Advisory Committee, and Special Education Parent Teacher Association

Based on the findings of the work in the fall, planning factors for the following programs and positions warranted consideration for revisions

- English Learners (EL)
- Special Education (SPED)
- General Education (GenEd) Classroom Teachers (MS/HS)
- Specials (Art, Music, Physical Education) Teachers (ES)
- Counseling and Student Support Services (School Counselors, Psychologists, Social Workers)
- Instructional Coaches (Math, Literacy, Advanced Academics)
- School Administration (ES)
- Clerical
- Technology Service Technicians

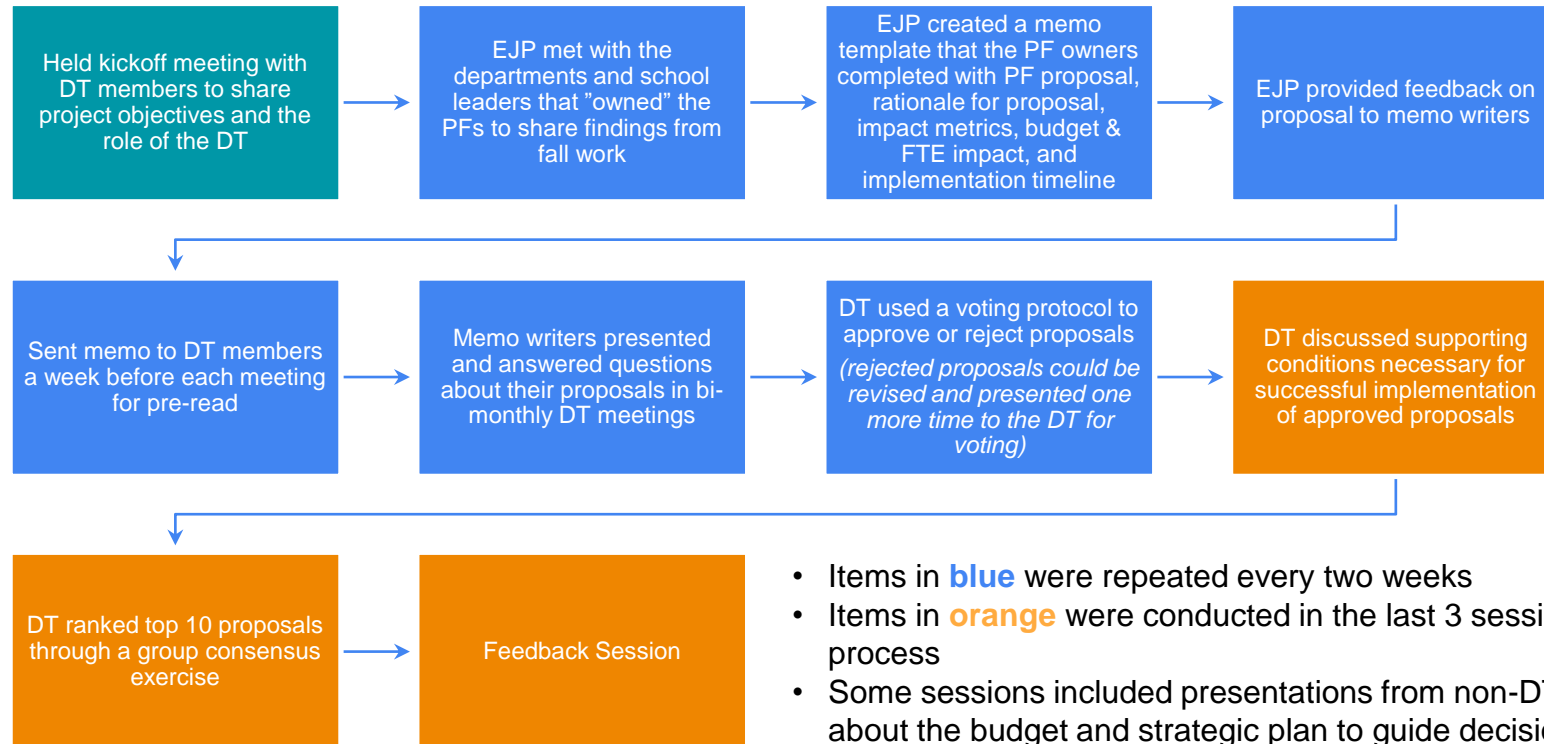
We worked collaboratively with a Design Team to co-develop the PFs recommendations with APS' stakeholders

- An inclusive, collaborative design process that brings together a representative group of people to co-develop solutions
- Valuable for creating strategic recommendations that are more likely to be accepted, owned, and trusted by a community
- Honors APS' commitment to inclusivity and ensures that the planning factors recommendations represent the division's and community's current values and priorities
- **Design Team Role:** Provide APS leadership (cabinet and school board) with recommended changes to the FY24 PFs that prioritize student, school, and teacher needs in alignment with the division's priorities and budget considerations

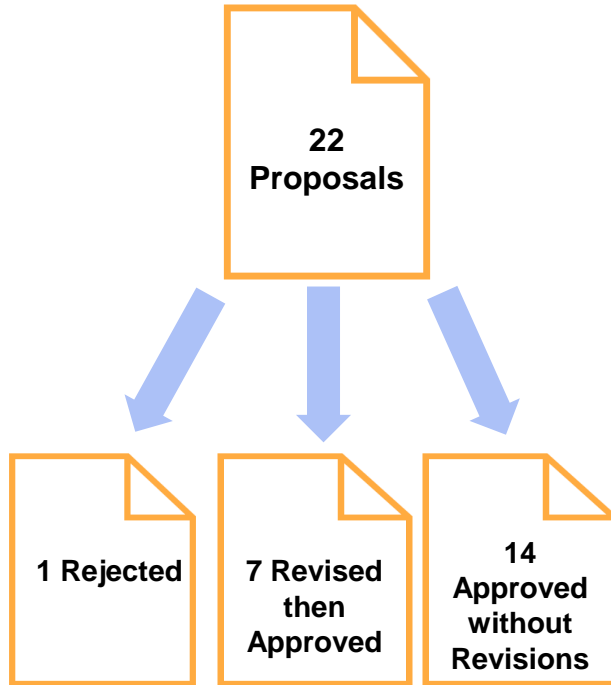


Some school staff also represented unions and advisory committees

The Design Team used a structured process in bi-monthly meetings from January to April to develop and discuss recommended changes to the planning factors



The Design Team evaluated 22 proposals that covered 20 staff positions



Proposal Category	Positions in Proposals
English Learners	EL Teachers, EL Instructional Assistants (IAs); EL Counselors; Bilingual Family Specialists
Special Education	SPED Teachers, SPED IAs
Student Academic Support	Math Interventionists, Literacy Interventionists
Student Support Services	Counselors, Psychologists, Social Workers
Teacher Support	Math Coaches, Literacy Coaches, Advanced Academics Coaches, Instructional Technology Coaches
Other	Technology Service Technicians, Testing Coordinators, Specials Teachers, Flexible Planning Teachers, ES Assistant Principals

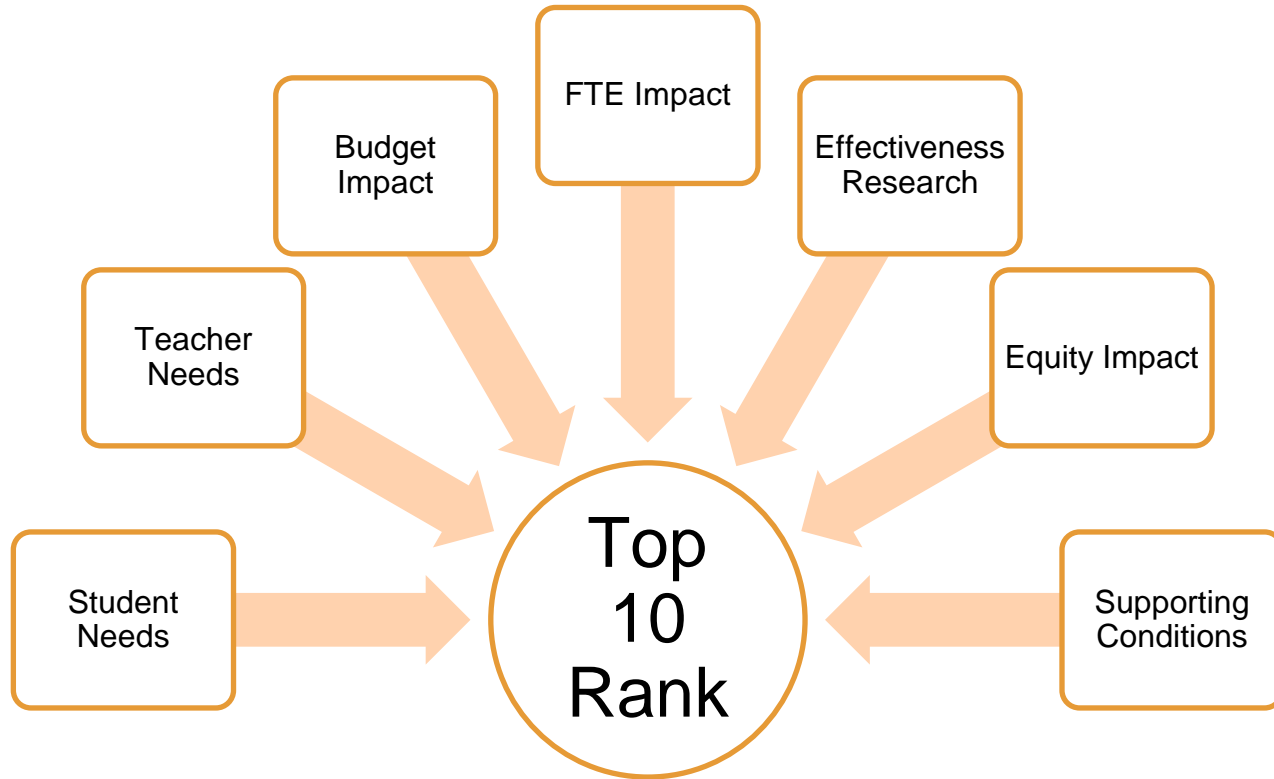
Approved proposals include those that result in savings, but the net effect of all the proposals would require APS to make additional investments

Proposal	\$M Chg to FY24 Budget ^a	FTE Chg to FY24 Budget ^a
Specials Teachers (ES)	-\$5.84	-54.4
Flexible Planning Teachers (ES)	-\$0.48	-4.5
EL Social Workers (MS/HS)	+\$0.16	+1.5
EL Bilingual Family Specialists (ES/MS/HS)	+\$0.25	+3.7
Counselors, Psychologists, Social Workers (HS)	+\$0.48	+4.5
EL Teachers & IAs (ES/MS/HS)	+\$0.56 ^b	-13.9
Technology Service Technicians (ES/MS/HS)	+\$0.60	+6.0
Testing Coordinator (ES/MS/HS)	+\$0.64	+6.0
Assistant Principals (ES)	+\$0.68	+4.0
Counselors, Psychologists, Social Workers (MS)	+\$1.51	+14.1
Counselors, Psychologists, Social Workers (ES)	+\$1.64	+15.3
Literacy Interventionists (ES/MS/HS)	+\$3.27	+30.5
Instructional Coaches (ES/MS/HS)	+\$3.47	+35.9
Math Interventionists (ES/MS)	+\$3.92	+36.5
SPED Teachers & IAs (HS)	+\$3.96	+22.4
SPED Teachers & IAs (MS)	+\$4.75	+38.3
SPED Teachers & IAs (ES)	+\$7.30	+72.0
Total	+\$26.87	+217.9

^aAnalytic comparisons to FY24 Budget \$s and FTEs based on FY24 Spring Update Projected Enrollment and FY24 Position Average Salary Data.

^bThe EL Teachers & IAs proposal results in an investment even though the overall FTE Change to FY24 Budget is a reduction because the proposal adds teachers to the program as it reduces IAs and the salary differential results in a budget increase

The Design Team considered various factors to determine how to prioritize and rank the approved proposals



The Design Team's ranking represents a prioritization of APS' neediest student populations and teacher support

Rank	Proposal	\$M Chg to FY24 Budget	FTE Chg to FY24 Budget
1	EL Teachers & IAs (ES/MS/HS) ^a	+\$0.56	-13.9
2	Literacy Interventionists (ES/MS/HS)	+\$3.27	+30.5
3	Math Interventionists (ES/MS)	+\$3.92	+36.5
4	SPED Teachers & IAs (ES)	+\$7.30	+72.0
5	SPED Teachers & IAs (HS)	+\$3.96	+22.4
6	SPED Teachers & IAs (MS)	+\$4.75	+38.3
7	Counselors, Psychologists, Social Workers (ES)	+\$1.64	+15.3
8	Counselors, Psychologists, Social Workers (MS)	+\$1.51	+14.1
9	Instructional Coaches (ES/MS/HS)	+\$3.47	+35.9
10	EL Social Workers (MS/HS)	+\$0.16	+1.5
TOP 10 TOTAL		+\$30.54	+252.6

^aThe EL Teachers & IAs proposal results in an investment even though the overall FTE Change to FY24 Budget is a reduction because the proposal adds teachers to the program as it reduces IAs and the salary differential results in a budget increase.

The Design Team also identified the “Supporting Conditions” necessary for the successful implementation of the approved proposals

A “supporting condition” is a situation, process, practice, environment, policy, procedure, mindset, operation, or strategy that must be in place in order to expect that the newly adopted planning factors will yield the desired student performance or other results.

Primary Supporting Conditions Identified by the Design Team have significant implications for **Human Resources and Talent Management**

Clarity: Well-written, current job descriptions that clearly describe position responsibilities and how those responsibilities play out in the school as an integrated and effective system.

Communication: Effective communication of job responsibilities to ALL stakeholders (CO, administrators, staff and families/guardians), with special care in messaging changes in certain planning factors (e.g. specials teacher, AA Coaches)

Accountability: Holding all personnel accountable to the job descriptions, especially those in newly defined positions.

Recruiting, Hiring and Retaining: Redesigning HR processes and strategies to meet the demands of the new PFs (e.g., SPED and EL) and rethinking compensation structures to reflect market demand (e.g., stipends for bilingualism).

Reduction in Force: RIF needs to be planned carefully, early, and messaged appropriately.

Primary Supporting Conditions Identified by the Design Team have significant implications for **building capacity and changing mindsets**

Building Capacity:

- The revised PF reflect APS's inclusion vision. This vision must be supported by intensive co-teaching professional development.
- SPED and EL teachers need to increase content knowledge and skills, GenEd teachers must understand Sped and EL strategies.
- Schools need support in designing effective master schedules that reflect division and state curriculum requirements and incorporate inclusive Common Learning Time supported by coaches.

Changing Mindsets: There must be a shift in mindsets such that APS's values and beliefs are internalized.

- "ALL our students" - EL students do not belong to EL teachers, SWDs do not belong to SPED teachers.
- Intervention is not always the solution. Tier 1 instruction must be robust and inclusive of all students.
- Coaching is a valuable resource for all teachers.

Primary Supporting Conditions Identified by the Design Team have significant implications for **infrastructure and interdependencies**

Infrastructure:

- Schools will need to rethink school and classroom space for new positions and new ways of servicing students and conducting school.
- Data systems need to be updated to provide progress monitoring and effective academic and social/emotional/behavioral interventions.

Interdependencies:

- PF changes are interdependent. PFs cannot be adopted in isolation, but adoption must consider the impact on other PFs (e.g. reduction in specials and principals' flexibility to meet their school's coaching, intervention, EL, SWD needs)

The Design Team did not vote on positions that require leadership decisions about instructional programs and complex HR processes

Category	Position	Design Team Role
Significant vision and instructional program issues to be determined by leadership	<ul style="list-style-type: none">Exemplary Projects TeachersMS GenEd TeachersHS GenEd Teachers	<ul style="list-style-type: none">Feedback/input from Design Team to inform leadership decision-making, no voting
Requires HR assessment to set accurate job titles and descriptions, FTE classifications, etc.	<ul style="list-style-type: none">Clerical Staff	<ul style="list-style-type: none">None. EJP discussed work that needs to be done with HR team.

The next few slides lay out the issues with the Exemplary Projects, MS and HS GenEd Teachers staffing allocations, the potential budget impact of addressing those issues, and recommendations for next steps

APS needs to review the use of Exemplary Projects allocations and determine if, and how, they fit into core school functions

Background:

There are no Planning Factors for Exemplary Projects. Several years ago, schools submitted proposals for Exemplary Projects. Schools were awarded personnel or non-personnel budgets. It is believed that Exemplary Project budgets have been rolled over each year. Interviews indicate that FTEs for non-Title 1 schools were reduced by half 1-2 years ago.

Proposed Planning Factors:

Currently, there are no recommended changes to the Exemplary Project budgets. In 2024-2025, APS will review the use of these funds in light of division-wide strategies and priorities.

Budget Implication: \$2.8M (FY24 Budget)

MS GenEd Teachers PFs contain errors and assume a teaming model that is not the reality for some schools. Leadership needs to determine the instructional model for MS and align PFs to it.

Background:

- Current PFs assume a teaming structure for Core classes, but not all MS are implementing a team structure for several reasons, including the addition of intensive courses and incorrect elective PF formula.
- A core teaming structure requires more staff than a non-teaming structure, however.
- APS non-elective PF undercounts elective periods and severely under-allocates elective staff.

Recommendations:

- APS must determine an MS instruction program and develop PFs that support this structure.
- Provide Schools with support in creating master schedules.
- At a minimum, correct elective staffing formula which disproportionately impacts MS with higher populations of SWD and EL students.

The FY24 MS GenEd teachers PFs staffing formula includes errors that need to be fixed

Planning Factors		Issues
Core Teaming	4.0 Positions per Grade level teams. Teams are 130 (including Sped and EL) students, rounded up to the nearest whole number	APS 2023 - 2024 MS Program of Studies indicates maximum team size of 125
	1.0 Reading Teacher per 6 th grade team	None, most schools are teaming in 6 th grade
Non-core	$(\text{GenEd students}/25.15)/5*2 + \text{SWD}/25.15/5*1$	<ul style="list-style-type: none"> • There are 3 non-core classes for 7th/8th grade • Does not include EL Students in non-core • Only includes 1 non-core for SWD • Unclear about 25.15 class size
Health	0.4 Health education Specialist per MS	None
Core Supplement	1 core supplement per MS	Not in Planning Factors Unclear purpose
EL 1-4 Supplement	From 0.5 - 2.0 teachers depending on enrollment	Unclear purpose Provided to schools as GenEd teacher

Staffing increases when the MS GenEd teachers formula is corrected

	FTEs		Investment (\$M)
Current PF	316.1		\$33.9M
Adjusted PF	344.4		\$37.0M
Difference (Electives)	+28.3		+\$3.0M (+9%)
Adjustment	Current PF	Amended PF	Difference
Include SWD for an additional (1) non-core period	4.8	9.3	+4.5
Include EL for 2 non-core periods (EL Supplement)	8.5	11.4	+2.9
Add an additional non-core period for ALL 7th and 8th graders	97.6	118.4	+20.8

Teaming at the MS is a significant investment and APS should determine how effective it is and how well it aligns with the division's other instructional priorities

	FTEs	Investment Required (\$M)
Teaming (Corrected)	344.4	\$37.0
Teaming in 6th Grade, No Teaming in 7th and 8th Grade	325.1	\$34.9
No Teaming	312.1	\$33.5
Difference (Between All Teaming and No Teaming)	+32.3	+\$3.5

HS GenEd Teachers PFs are not adequately staffing for inclusion. Additionally, HS principals are facing challenges balancing GenEd teacher resources for core and non-core classes.

Background:

- The formula that allocates HS GenEd teachers does not include EL and Students With Disabilities (SWDs) in accordance with APS' inclusion goals, and significantly under-allocates needed staff.
- Unclear purpose of GenEd FTEs that seem to be originally intended to support EL students.
- SOL Core Supplement allocation seems to be a performance-related planning factor but it is not using a performance metric.

Recommendations:

- At a minimum, correct inclusion errors in the staffing formula, which disproportionately impact HS with higher populations of SWD and EL students.
- Gather and analyze data on elective offerings to determine if breadth of offerings aligns with students' needs and desires and which instruction delivery modes are most effective for them

The current PFs that allocate HS GenEd Teacher FTEs need adjustments

Planning Factors		Issues
GenEd Classroom Teachers	$((\text{GenEd students}/25.9)/5*7)+((\text{SWDs}/25.9)/5*1) =$ teachers	<p>“The math is not inclusive”</p> <ul style="list-style-type: none"> • Does not include EL students; GenEd defined as non-EL, non-L2 SWDs • Level 2 SWDs (15+ hrs of service) included for only 1 period; misaligned with APS’ 80/80^a goal
SOL Core Supplement	<ul style="list-style-type: none"> • 1.0 GenEd teacher FTEs per 1-100 FRL students; 0.5 FTE for every additional 100 FRL students PLUS • 0.5 GenEd teacher FTEs for FRL % 40-49%; 0.5 FTE for every additional 10 percentage points 	<ul style="list-style-type: none"> • Performance-related planning factor is not using a performance metric
EL 1,2 Transition	1.0 FTE at Wakefield 0.8 FTE at W-L 0.2 FTE at Yorktown	<p>“Planning factors that lost their identity”</p> <ul style="list-style-type: none"> • May have been intended to support ELs, but unclear in which capacity
EL 1-4 Supplement	From 0.5 - 1.0 FTE depending on EL 1-2, 3-4 enrollment	<ul style="list-style-type: none"> • Provided to, and used by, schools as GenEd teachers • Addressed in the HS EL Planning Factors proposal to be used for co-teaching in English Language Development Sheltered Courses
Health	0.6 Health Education Specialist per HS	None

^aAPS’ 80/80 goal is to have 80% of Students With Disabilities in a GenEd classroom 80% of the time.

Additionally, HS principals are facing challenges balancing GenEd teacher resources for core and non-core classes

- 25% of high school core classes are above the target class size (25.9) set by the planning factors (compared to 5% of MS core classes)
- Contributing factors:
 - A larger number of electives and levels of courses; puts greater limitations on the ability of the schools to level class size
 - Some elective sequences must be offered, even with smaller classes, because they fulfill certification or degree requirements (i.e., Career & Technical Education certification, International Baccalaureate diploma)
 - Principals frequently prioritize decreasing class sizes in graduation-required courses that enroll more students who tend to struggle academically, resulting in larger class sizes in other courses.

How to address the HS GenEd planning factors will depend on APS' decisions on inclusion of special populations, support strategy for struggling students, and balancing of core and non-core program offerings

	FTE Change (+/-) to FY24	\$ Change (+/-) to FY24
Include EL students <i>(inclusion based on GenEd periods for WIDA levels per EL program model)</i>	+35.1	+\$3.8M
Increase SWD inclusion assumption <i>(increase periods in PFs to 6)</i>	+24.6	+\$2.6M
Use performance metrics for SOL supplement <i>(0.5 teacher FTE for every 50 students that did not pass SOL)</i>	+1.3	+\$0.1M
“Protect” strategic core classes (9-12 ELA, 9th Math) with EL & SWD inclusion <i>(allocate FTEs at 1.0 per 23.9 students for strategic core classes; assumes 1 period of each per respective student group; all other classes allocate at 1.0 per 25.9)</i>	+55.7	+\$6.0M

Executive Summary

- The Design Team evaluated 22 planning factors proposals that covered 20 staff positions
- 21 of the proposals were approved by the Design Team for consideration for adoption by APS' leadership team
- Approved proposals include those that result in savings, but the net effect of all the proposals would require APS to make an additional investment of \$26.9M (compared to the FY24 Budget)
- Given the division's strategic priorities and budget considerations, the Design Team ranked the Top 10 proposals they would highly recommend implementing
- The Top 10 proposals represent a prioritization of APS' neediest student populations, and would require an additional investment of \$30.5M
- Updating the planning factors for GenEd MS and HS Teachers and the allocation for Exemplary Projects Teachers requires APS leadership to determine the instructional vision for these programs and align the planning factors to it
- Additionally, the GenEd MS and HS planning factors contain errors and inclusion issues that need to be fixed

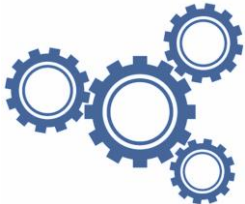
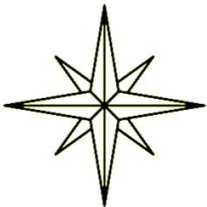
APS can use a modified version of the Design Team process to address future planning factor changes

WORK TO BE DONE BY:

LEADERSHIP

PF OWNER

DESIGN TEAM

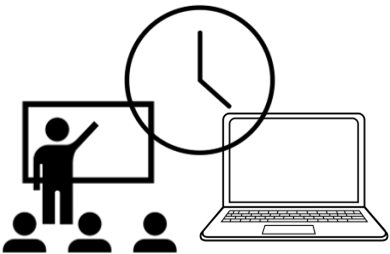


CREATE
POLICY

USE STRATEGIC PLAN
AS NORTH STAR

RESEARCH EFFECTIVE
PRACTICES

DETERMINE
PROGRAM MODEL



DETERMINE RESOURCES
NEEDED FOR MODEL

PRESENT, CONSULT AND
PRIORITIZE IN DESIGN TEAM

PRESENT RECS
TO LEADERSHIP

VOTE ON
CHANGES

Appendix

Appendix A: Information Applicable to All Analyses

Sources – Planning Factors

- Arlington: [School Board's Adopted Budget Fiscal Year 2024](#)
- Alexandria City: [FY 2024 Proposed Budget](#)
- Fairfax: [FY 2024 Approved Budget](#)
- Falls Church: [FY2024 Superintendent's Proposed Budget](#)
- Loudoun: [2023-2024 Staffing Standards](#), 2023
- Prince William: [Budget Manual Fiscal Year 2024, July 2023](#)
- SOQs: [2022 Standards of Quality](#)
- [Regulations Governing Special Education Programs for Children with Disabilities in Virginia](#)

Details about Schools and Programs included and excluded from analysis and proposals

Grade Level	Schools Included	Schools or Programs Excluded
ES	Abingdon * Fleet * Arlington Science Focus School * Arlington Traditional * Ashlawn * Barcroft * Barrett * Campbell * Cardinal * Carlin Springs * Claremont * Discovery * Drew * Escuela Key * Glebe * Hoffman-Boston * Innovation * Jamestown * Long Branch * Montessori Public School of Arlington * Nottingham * Oakridge * Randolph * Taylor * Tuckahoe	* Preschool programs * Integration Station
MS	Dorothy Hamm * Gunston * Jefferson * Kenmore * Swanson * Williamsburg	*Shriver
HS	Wakefield * Washington-Liberty * Yorktown	* H-B Woodlawn * Arlington Career Center * Arlington Community High School * Langston * New Directions
K-12		* APS Virtual Learning

Appendix B: Data Design Team Used to Rank Proposals

The Design Team considered multiple factors in determining the ranking of approved proposals

Proposal Category	Subcategory	Investment or Savings Chg \$M to FY24	Implementation Timeline	# of Students Impacted (FY24 Enroll Proj)	Investment or Savings \$/ppl	Weighted Mean Effect Size ^a	Equity Impact
EL	Teachers (ES/MS/HS)	\$0.56	3 years	5,504	\$101	0.40	Improve
	EL Social Workers (MS/HS)	\$0.16	1 year	837	\$192	N/A	
	BFS (ES/MS/HS)	\$0.25		9,572	\$26	N/A	
SPED	ES	\$7.30	5 years	1,614	\$4,525	-0.01 - 0.47	Improve
	MS	\$4.75	5 years	857	\$5,539		
	HS	\$3.96	5 years	1,082	\$3,659		
Student Academic Spt (Interventionists)	Math (ES/MS/HS)	\$3.92	Not Specified	1,801	\$2,175	0.74	Improve
	Literacy (ES/MS/HS)	\$3.27	Not Specified	2,578	\$1,270		
Student Support Svcs (Counselors, Psychologists, Social Workers)	ES	\$1.64	4 years	12,720	\$129	0.23 - 0.50	Improve
	MS	\$1.51	4 years	5,607	\$270		Mixed
	HS	\$0.48	2 years	7,043	\$69		Improve
Teacher Spt (Instructional Coaches)	ES/MS/HS	\$3.47	Not Specified	25,370	\$137	0.26	N/A
Technology Svc Technician	ES/MS/HS	\$0.60	Not Specified	25,370	\$24	N/A	N/A
School Test Coordinator	ES/MS/HS	\$0.64	Not Specified	25,370	\$25	N/A	N/A
Other	ES - AP	\$0.68	Not Specified	12,720	\$54	0.17 - 0.37	N/A
	ES - Flex Teachers	-\$0.48	Not Specified	12,720	-\$38	N/A	
	ES - Specials Teachers	-\$5.84	Not Specified	12,270	-\$459	N/A	

^aData is from the Visible Learning Meta[®] research database which is a collection of over 2,100 meta-analyses, which includes more than 132,000 research studies involving over 300 million students worldwide. The Weighted Mean Effect Size refers to the average progress a student makes per year of schooling when using a specific strategy.

Brief description of the proposals ranked in the Top 10 by the Design Team

Rank	Proposal	Brief Description
1	EL Teachers & IAs (ES/MS/HS)	Implement a Sheltered English Language Development program model and allocate EL teachers to schools based on the number and need level of EL students in a school.
2	Literacy Interventionists (ES/MS/HS)	Allocate Literacy Interventionists based on the number of students scoring below basic or lowest quintile on spring administration of nationally-normed literacy assessment in a school.
3	Math Interventionists (ES/MS)	Allocate Math Interventionists based on the number of students scoring below basic or lowest quintile on nationally-normed mathematics assessment in a school.
4	SPED Teachers & IAs (ES)	Allocate SPED teachers and IAs to allow at least one co-taught class per grade in ES and based on need level of SWDs in a school.
5	SPED Teachers & IAs (HS)	Allocate SPED teachers and IAs to allow at least one co-taught class per grade-core subject combination in HS and based on need level of SWDs in a school.
6	SPED Teachers & IAs (MS)	Allocate SPED teachers and IAs to allow at least one co-taught class per grade-core subject combination in MS and based on need level of SWDs in a school.
7	Counselors, Psychologists, Social Workers (ES)	Allocate Counselors, Psychologists, and Social Workers based on the total number of students, percent of SWDs, percent of students receiving free and reduced lunch, and the chronic absenteeism rate in a school.
8	Counselors, Psychologists, Social Workers (MS)	Allocate Counselors, Psychologists, and Social Workers based on the total number of students, percent of SWDs, percent of students receiving free and reduced lunch, and the chronic absenteeism rate in a school.
9	Instructional Coaches (ES/MS/HS)	Allocate 3.0 instructional coach FTEs consisting of 1.0 math, literacy, and advanced learners coach each per school. Schools would receive an additional 1.0 FTE instructional coach to support refinements of Tier 1 instruction based on percent of students performing below a target performance percentile on nationally-normed tests.
10	EL Social Workers (MS/HS)	Allocate EL Social Workers to schools based on the number of EL Levels 1 and 2 students (the neediest EL levels) in a school.

Project Closeout

- Providing copies of all proposal memos and underlying analyses files to COO, the Finance team, and the Board
- Providing training support to Finance on the allocations analysis software