

Benchmarking

MSBO 2017 ANNUAL CONFERENCE

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Benchmarking: How My District Compares?

- Value of Benchmarking
- Benchmarking Process
- Data Sources
- How to Use Comparative Benchmark Data
- New Tools for Data Analysis

Four Valuable Benefits

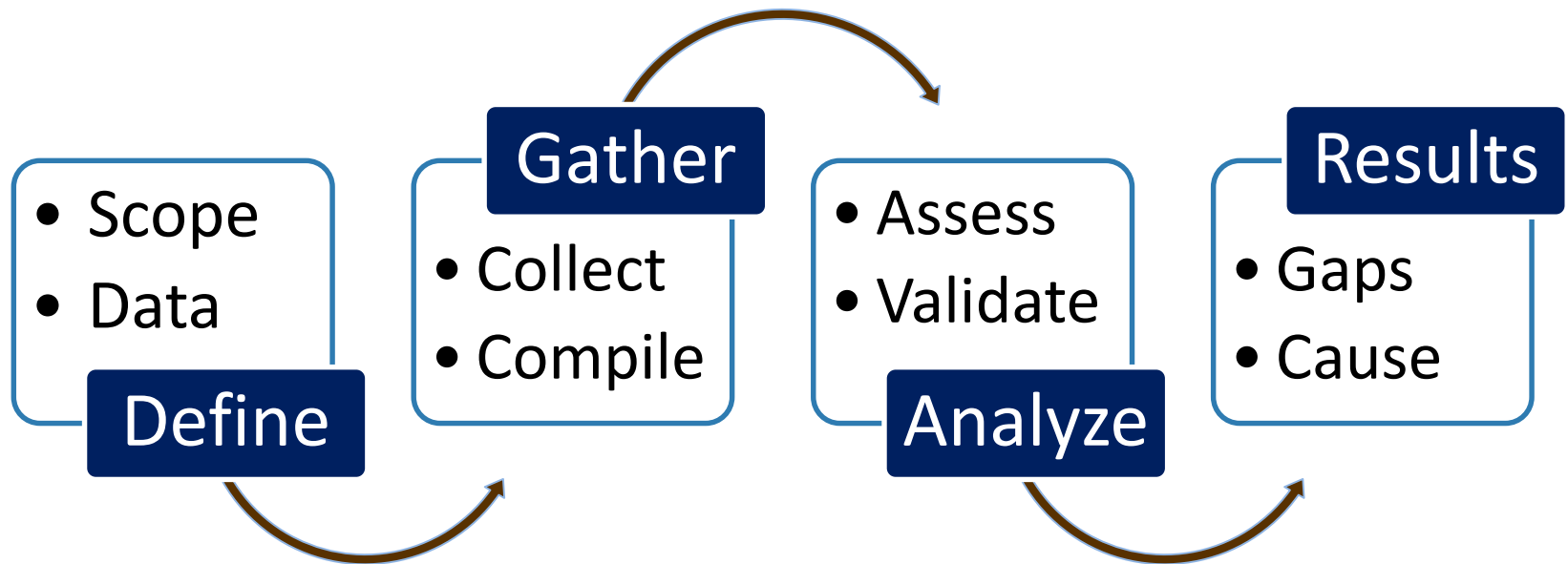
- Gauge where your district:
 - Leads
 - Lags
 - Is on Par
- Facts to foster change
- Defend actions
- Establish a business case and roadmap

Why Districts Benchmark

- Staffing and cost comparisons
- Considering alternative organizational structures
- Reinventing how services are delivered
- Increasing use of technology

How to Benchmark

Process by which an organization evaluates itself against some other entity



Sources for Comparative Data

- Michigan Department of Education – Bulletins 1014, 1011
- MSBO – Transportation, Facilities
- Education Organizations
 - National Center for Education Statistics
 - Great City Schools
- Intermediate School Districts
- Survey of Peer Districts

An Example

- Anytown School District
 - Experiencing declining Fund Balance
 - Identified by Treasury for Early Warning
 - Undergoing Administrative Review

Identify Peer Districts

- Peer District Criteria
 - Pupil FTE Count
 - Foundation Allowance
 - Free and Reduced %
 - ELL %
 - Special Ed Enrollment as a % of Total
 - Average Teacher Salary
 - Geographic Considerations
- NOTE: Identification of peer districts is valuable in any benchmarking effort

Peer Districts Comparison

Metric	Anytown	Peer A	Peer B	Peer C	Peer Avg	% of Avg
Pupil FTE Count	6,900	5,300	10,500	5,800	7,200	95.8%
Foundation Allowance	\$7,873	\$8,169	\$7,391	\$7,608	\$7,723	101.9%
Free & Reduced %	74%	66%	65%	53%	61%	120.7%
ELL %	3.5%	2.9%	3.6%	4.9%	3.8%	92.9%
SE Pupils as A % of Total	18.0%	10.8%	15.5%	10.2%	12.2%	147.9%
Avg Teacher Salary	\$53,000	\$65,000	\$58,000	\$61,000	\$61,333	86.4%

Detailed Analysis

Staffing - General	Staffing - Specialized
<ul style="list-style-type: none"> • Student per Staff FTE • Students per Teacher (HC and FTE) • Students per Administrator (HC and FTE) • Pupil : Teacher Ratio 	<ul style="list-style-type: none"> • SE Students per SE Professional • Students per Guidance Counselor • Students per Social Worker • Students per Psychologist
Per Student Non-Instructional Expenditures	Wages & Benefits
<ul style="list-style-type: none"> • General Administrative • School Administrative • Business Services • Instructional Staff Services • Pupil Services • Operations & Maintenance • Transportation • Other Support 	<ul style="list-style-type: none"> • Min/Max Wage by Position • Wage & Benefit Expenditures • Benefits as a % of Wages • Overtime, Worker's Comp and Unemployment Costs • Sub Expenditures

Detailed Analysis

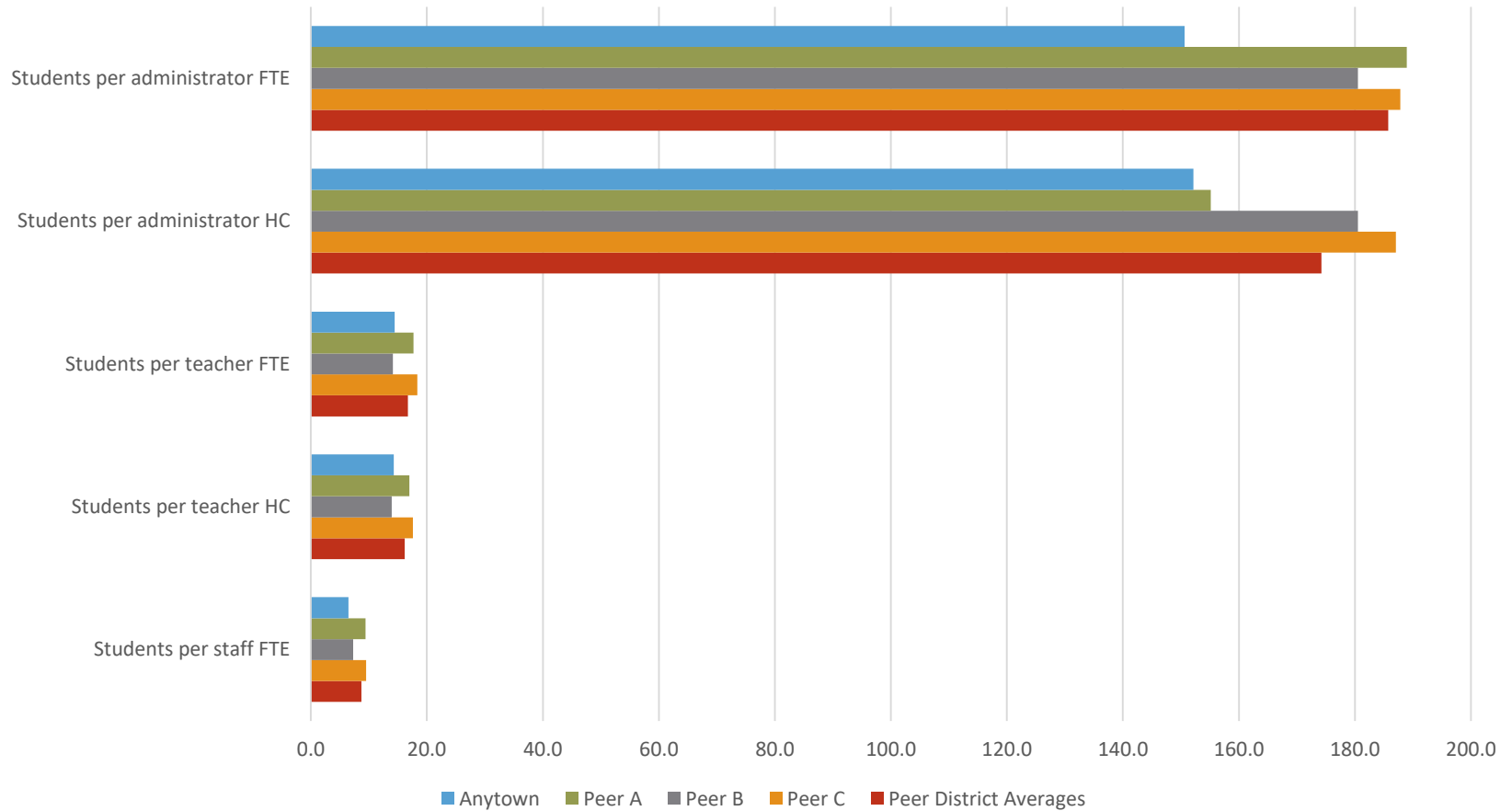
Maintenance Detail	Transportation Detail
<ul style="list-style-type: none">• As a % of Total Expenditure• Per Student• Per Instructional Sq Ft• Utilities Cost per Instructional Sq Ft• Instructional Sq Ft per Custodial FTE• Instructional Sq Ft per Maint/Trades FTE• Acres under Maintenance per Grounds FTE• Utilities Expenditure per Student• Communications Expenditure per Student	<ul style="list-style-type: none">• Cost per Rider (Regular and SE)• Cost per Bus (Regular and SE)• Average Buses per Mechanic• Buses per 100 Students

Staffing

Metric	Anytown	Peer A	Peer B	Peer C	Peer Avg	% of Avg
Students per Staff FTE	6.5	9.4	7.3	9.5	8.7	74.2%
Students per Teacher HC	14.3	17.0	13.9	17.6	16.2	88.4%
Students per Teacher FTE	14.5	17.7	14.2	18.3	16.7	86.5%
Students per Administrator HC	152.2	155.2	180.5	187.0	174.2	87.3%
Students per Administrator FTE	150.6	188.9	180.5	187.9	185.8	81.1%

Staffing

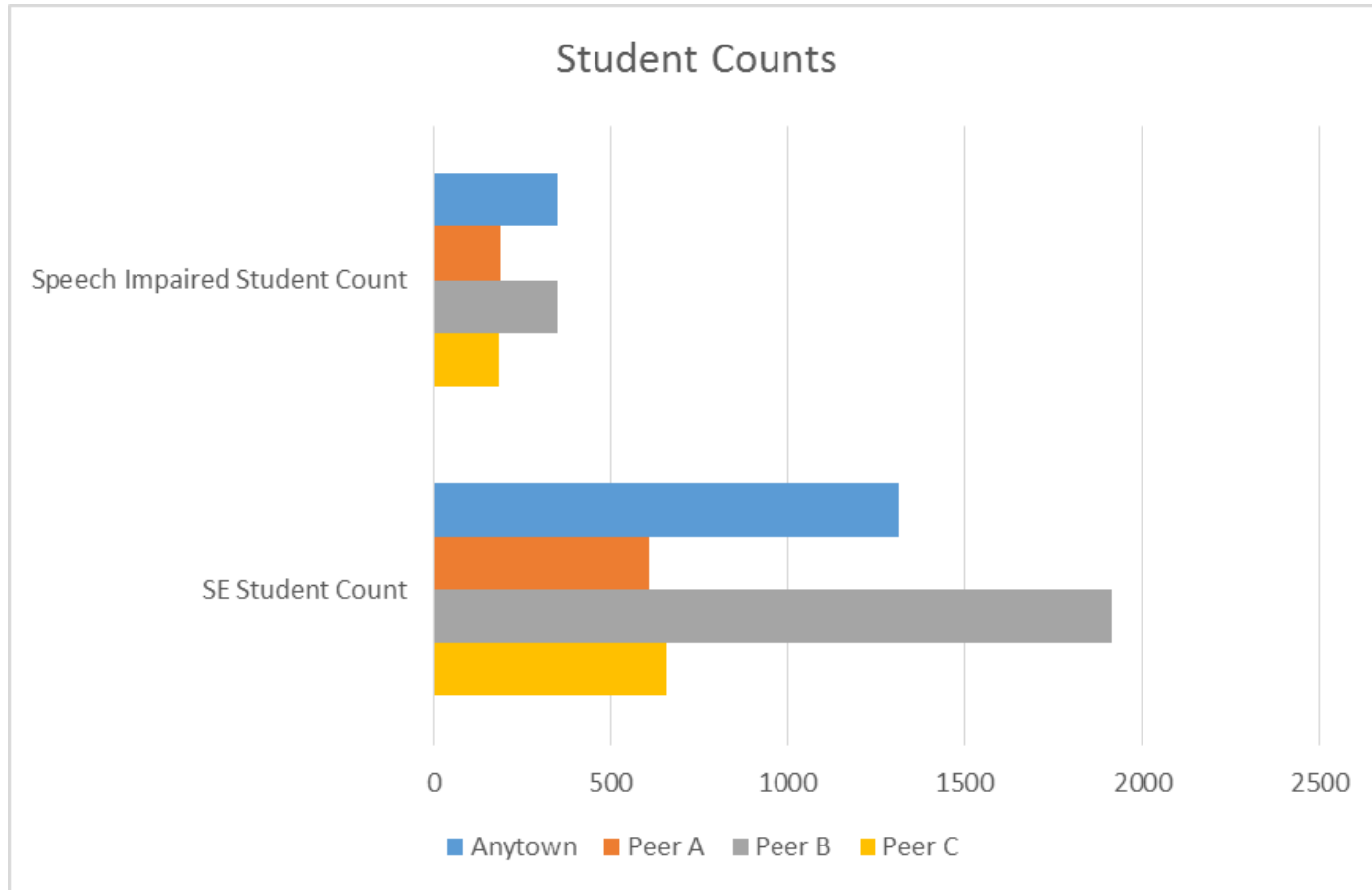
Staffing



Staffing - Specialized

Metric	Anytown	Peer A	Peer B	Peer C	Peer Avg	% of Avg
SE Student Count	1,314	609	1916	658	1,061	124%
Speech Impaired Student Count	349	185	349	182	239	146%
Speech Professionals	14.0	6.0	16.0	7.0	10	141%
Guidance Counselors	16.0	7.0	26.0	8.0	14	121%
Social Workers	8.0	6.6	25.0	3.0	12	72%
Psychologists	6.0	3.0	10.0	2.0	5	120%
SE Professionals	148.6	54.8	234.0	52.1	114	131%

Staffing - Specialized



Staffing - Specialized

Metric	Anytown	Peer A	Peer B	Peer C	Peer Avg	% of Avg
Speech Impaired Students per Professional	25	31	21	26	26	98%
Students per Guidance Counselor	422	750	437	660	616	69%
Students per Social Worker	833	795	453	1,759	1003	83%
Students per Psychologist	1,158	1,750	1,133	2,639	1841	63%
SE Students per SE Professional	9	11	8	13	11	83%

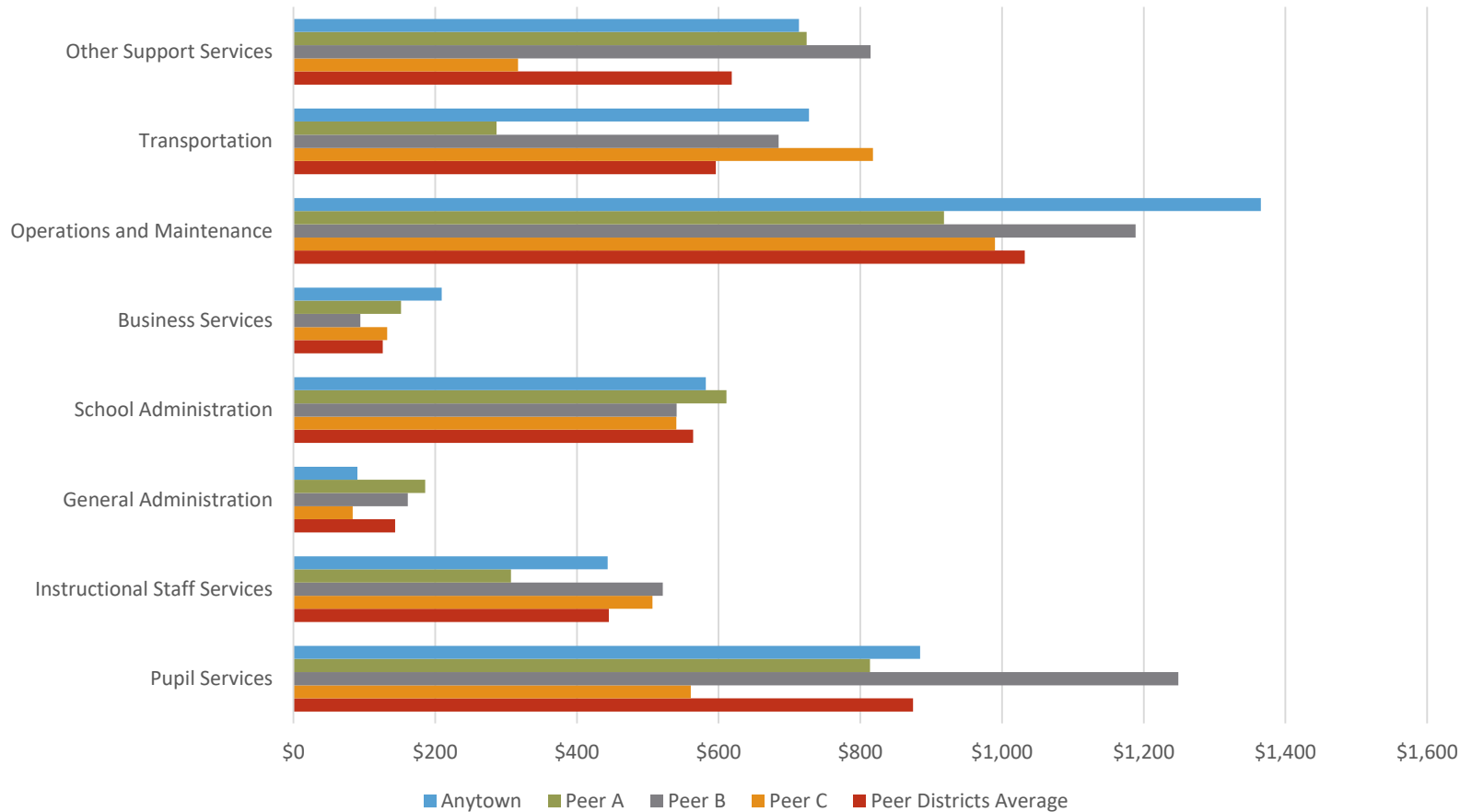
Non-Instructional Expenditures

Metric	Anytown	Peer A	Peer B	Peer C	Peer Avg	% of Avg
Pupil Services	\$884	\$814	\$1,249	\$561	\$875	101%
Instructional Staff Services	\$443	\$307	\$521	\$507	\$445	100%
General Administration	\$90	\$186	\$161	\$83	\$144	63%
School Administration	\$582	\$611	\$541	\$540	\$564	103%
Business Services	\$209	\$152	\$94	\$132	\$126	166%
Operations & Maintenance	\$1,365	\$918	\$1,189	\$990	\$1,032	132%
Transportation	\$728	\$286	\$685	\$818	\$596	122%
Other Support	\$713	\$724	\$814	\$317	\$619	115%
Total OPEX	\$11,907	\$10,398	\$12,180	\$11,130	\$11,236	106%

NOTE: Expenditures are per pupil

Non-Instructional Expenditures

Per Student Non-Instructional Expenditures



Maintenance Expenditures

Metric	Anytown	Peer A	Peer B	Peer C	Peer Avg	% of Avg
Maintenance as a % of Total	9.6%	6.8%	9.6%	7.7%	8%	120.4%
Maintenance Expenditures per Student	\$1,105	\$687	\$1,020	\$744	\$817	135.2%
Utilities Expenditures per Student	\$209.04	\$222.03	\$199.19	\$245.98	\$222.40	94.0%
Communications Expenditures per Student	\$85.17	\$0.16	\$7.09	\$15.34	\$7.53	1131.3%
Repairs & Maintenance Expenditure per Student	\$86.60	\$63.58	\$73.60	\$50.57	\$62.58	138.4%

NOTE: Expenditures are per pupil

Other Benchmarking Examples

- Staffing
- Transportation
- Facilities
- Expenditures

Sample: Staffing

	Business Office				Human Resources				Total			
	A	B	C	Y	A	B	C	Y	A	B	C	Y
Total	13.5	21	6	11.5	3	7	2	5.5	16.5	28	8	17
Students per FTE	687	655	584	456								
Staff per FTE					476	259	324	306				
\$1M budget per FTE	\$8.1	\$10.9	\$9.7	\$6.3					\$6.6	\$8.2	\$7.3	\$4.2

Source: Peer District Survey

Sample: Staffing

Function	# of Employees (FTEs)											
	Business Office				Human Resources				Total			
	A	B	C	Y	A	B	C	Y	A	B	C	Y
Hiring					1	3	.8	1.1	1	3	.8	1.1
Benefits	1		.5	.4		1	.5	.5	1	1	1	.9
Substitute Management					1	1	.7	1	1	1	.7	1
HR Other			.5	.5				2.5			.5	3
Requisitions/POs	2	5	.1	.7	1	1		.1	3	6	1	.8
Accounts Payable	2	4	1	2.6					2	4	1	2.6
Payroll	2.5	4	1	2.85		1		.1	2.5	5	1	2.95
Budget	2.5	2	1	4					2.5	2	1	.4
Accounting	2	5	1	1.25					2	5	1	1.25
Other	1			2.5								2.5
BOE Resolutions & Minutes	.5	1		.3				.2	.5	1		.5
TOTAL	13.5	21	6	11.5	3	7	2	5.5	16.5	28	8	17

Source: Peer District Survey

Sample: Transportation

Metric	District A	MSBO 2013 Statewide Survey Data		
		Region	Rider Group 3,001 - 4,000	Statewide
Average Cost Per Rider	\$1,495	\$705	\$1,059	\$909
Average Cost per RE Rider	\$926	\$564	\$785	\$690
Average Cost per SE Rider	\$5,254	\$5,379	\$8,223	\$6,348
Average Cost per Bus	\$59,917	\$49,554	\$66,555	\$53,531
Bus per 100 Students	2.5	1.4	1.6	n/a

Source: MSBO Student Transportation Benchmarking Study, July 2013

Sample: Organizational

	District A	District B	District C	District D	District E	District F
Enrollment	71,000	53,000	33,000	27,000	24,000	58,000
Employees	9,300	7,000	4,200	3,100	3,700	7,300
General Fund	\$497 m	\$409 m	\$236 m	\$234 m	\$157 m	\$439 m
Years on SIS	5	4	2	4	1	0
Hosted?	Hosted	Hosted	In-House	In-House	In-House	Hosted
Organization	CIO/Sup	CTO/Sup	CIO/Sup	CTO/ Business	CIO/Sup	EDT/ Business
Total SIS support staff	23	12	8	8	6	18

Sample: Facilities

#	Metric	State Median 2012-2013	Region 3 Median	District A
1	Maintenance expenditures as a % of Total Expenditures	6.32%	6.28%	8.3%
2	Total maintenance expenditures per square foot of instructional building space	\$3.22	\$3.12	\$4.62
3	Contracted services PLUS Total Building and Grounds Salaries per square foot of instructional building space	\$1.73	\$1.65	\$1.83
4	Instructional square feet per custodial FTE	31,822	39,450	29,336
5	Total Maintenance Expenditures per Student	\$587	\$571	\$658
6	Utilities per square foot of instructional building space	\$1.11	\$1.06	\$1.28

Source: MSBO Facilities Benchmarking Report, February 2014

Sample: Staffing Levels

Staff	Metric	District A	Recommendation	Recommending Body
Social Workers	Students per Staff FTE	486 to 1	400 to 1	School Social Work Association of America
			250 to 1	National Association of Social Workers
Speech Professionals	Caseload per Staff FTE	48 to 1	40 to 1 – Recommendation 50 to 1 - Actual	American Speech-Language-Hearing Association (ASHA)
Psychologists	Students per Staff FTE	980 to 1	1,000 to 1 – Recommendation 1,621 to 1 – Actual (National) 2,559 to 1 – Actual (MI)	National Association of School Psychologists
Guidance Counselors	Students per Staff FTE	220 to 1	250 to 1 – Recommendation 460 to 1 – Actual (National)	American School Counselor Association

Sample: Expenditures

	General Funds Revenues per Pupil	Current Operating Expenditures per Pupil	Total General Fund Expenditures per Pupil	Average Teacher Salary	Pupil Teacher Ratio
District A	\$10,272	\$10,229	\$10,585	\$60,661	23
Statewide Average	\$9,457	\$9,495	\$9,833	\$61,978	25.6
District A vs. Statewide Average	1.086	1.077	1.076	0.979	0.898
Class C Average (10,000 – 19,999 members)	\$9,873	N/A	\$10,442	\$69,044	23.7
District A vs. Class C Average	1.040	N/A	1.013	0.879	0.970

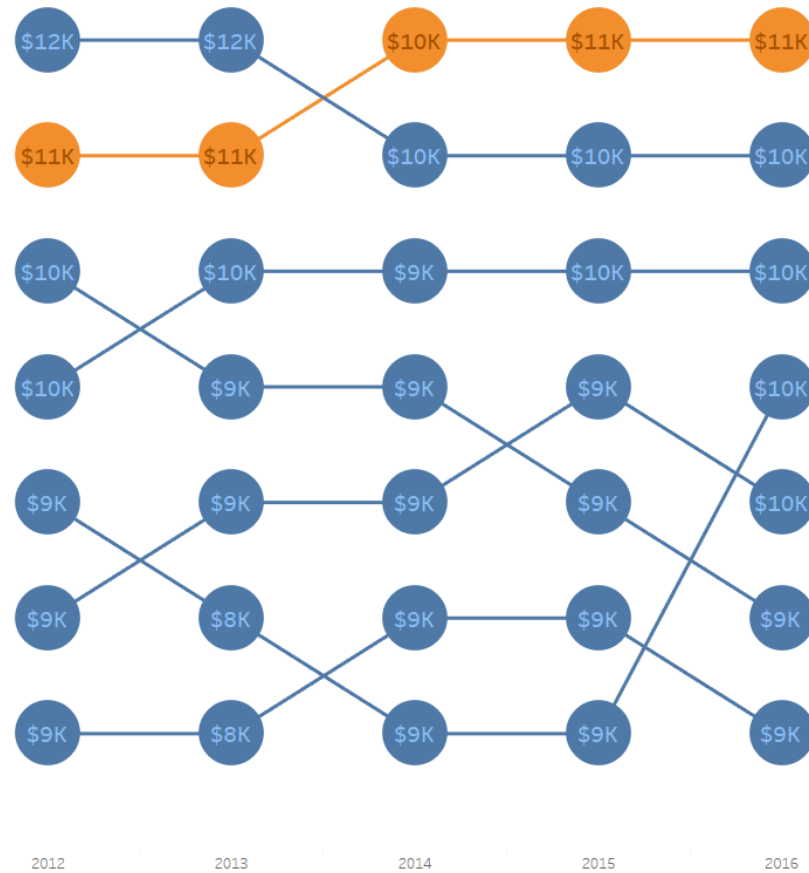
Source: MDE Bulletin 1014, published **February 2016**

New Tools for Data Analysis

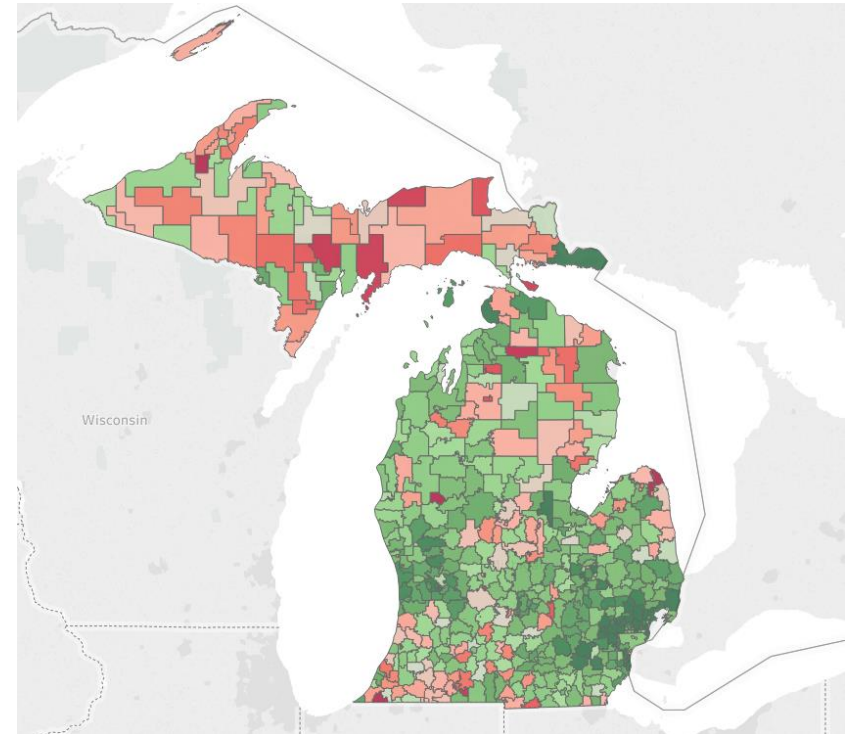
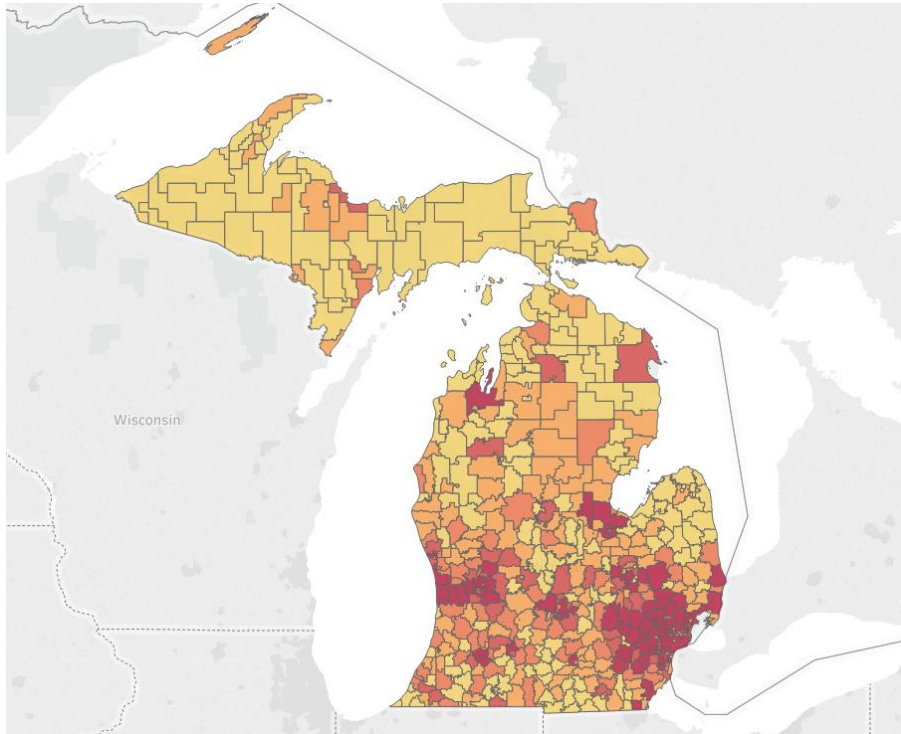
- Broad Range of Capabilities
- Broad Range of Costs
- Interactive Visualization of Data
 - Enables Analysis
 - Enables Presentation
- MS PowerBI
- Tableau
- Qlik
- Many others

New Tools for Data Analysis

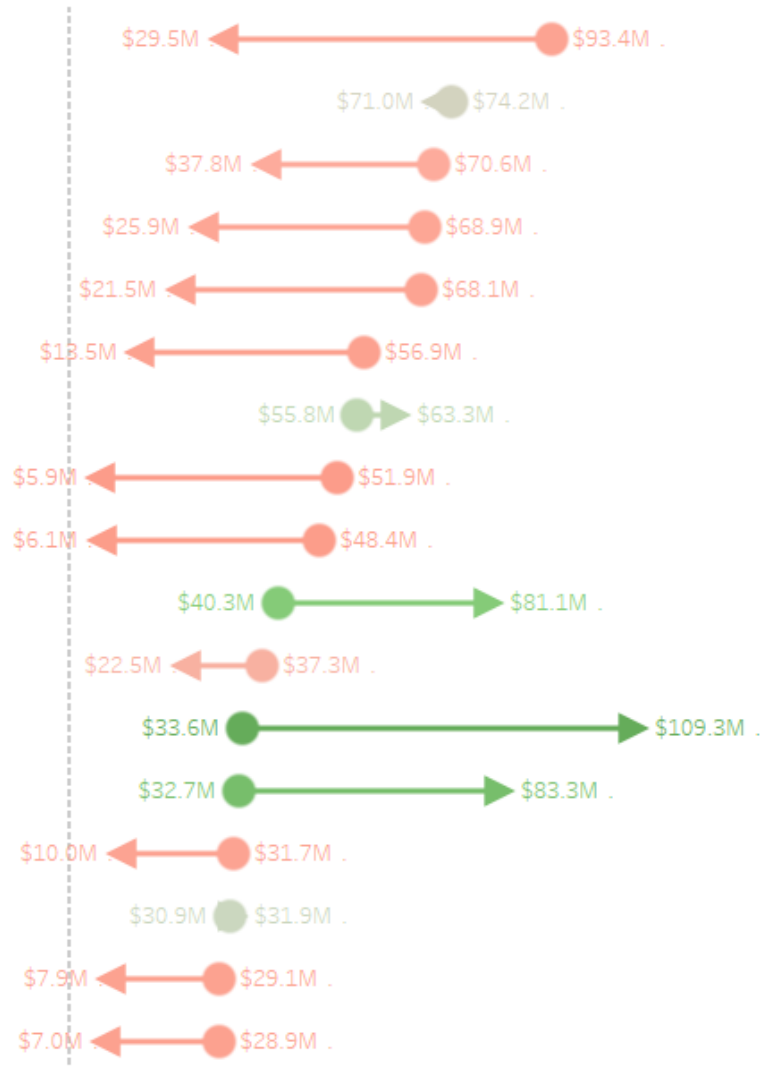
Expenditures - Total



New Tools for Data Analysis



New Tools for Data Analysis



Lessons Learned

- Districts are rarely exactly the same – use data carefully
- Benchmarking data shows Δ s – indicators of where to dig deeper
- Select peers carefully
- Your peers are very willing to share information
- Survey data tends to be older yet still can provide value
- Peer surveys may be better in many situations

Thank You

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