

3a. Data Request - District

District Data Request List

ITEM #	ITEM	PROVIDED?
1	Organization chart identifying positions and number of FTEs	
2	Approved budget for prior fiscal year and current fiscal year	
3	All approved budget amendments for prior and current fiscal years	
4	Budget pulled from the financial system for prior and current fiscal year (please provide in hard copy and spreadsheet format)	
5	Collective bargaining agreements	
6	SE-4096 for prior 3 years	
7	If not included in organization chart above, number of FTEs for the following: <ul style="list-style-type: none"> - Speech professionals - Social workers - Psychologists - Guidance counselors - IT staff - by role 	
8	Report identifying total wages by bargaining unit for each of the last 3 years. (please provide in hard copy and spreadsheet format)	
9	Report identifying authorized staffing by position with funding source (current year). (please provide in hard copy and spreadsheet format)	
10	Report identifying authorized staffing by labor group with funding source (current year)	
11	List of all wage modifications by classification by year for last 5 years (please provide in hard copy and spreadsheet format)	
12	Report identifying the number of employees paid at the minimum wage level (please provide in hard copy and spreadsheet format)	
13	Report of employees limited on hours worked as a result of receiving retirement funds through ORS	
14	Report identifying the number of part time employees by classification that qualify for ACA	
15	Report identifying the compensated absence accrual by bargaining unit for each of the past 3 years	
16	Report identifying the number of absences by classification for the prior fiscal year for: teachers, bus drivers, paraprofessionals/instructional aides	
17	Report identifying average benefits as a percentage of salaries by classification for prior fiscal year. (please provide in hard copy and spreadsheet format)	
18	Report identifying amount paid for substitute teachers for the prior three fiscal years. Identify whether a third party vendor was used and if so, please identify vendor.	
19	Report identifying amount paid to third party vendors for temp workers (other than substitute teachers) for prior fiscal year	
20	Enrollment projections for next 5 years including identification of methodology used	
21	Report identifying number of non-resident / school of choice students attending school within the district for the last 3 years	
22	Report identifying the number of 105/105c students by category for the prior year	
23	School Capacity Utilization report (identify instructional spaces and student capacity by building)	
24	Facilities survey including acreage, instructional sq footage and total sq footage, utility consumption	
25	SE-4094 for prior 3 years	
26	Facility assessment	

3a. Data Request - District

27	Equipment inventory include date of purchase (please provide in hard copy and spreadsheet format)	
28	IT data including number of staff, number of devices, IT spend	
29	Insurance certificates for all policies - property, casualty, E&O, dental, medical and annual premium data	
30	Statement of values (insurance)	
31	Strategic Plan	
32	Continuous improvement plan	
33	Spreadsheet of employees by bargaining unit with job classification/title, salary and benefits including unaffiliated staff (please provide in hard copy and spreadsheet format)	
34	Transcripts/bonding documents for active bonds including ST borrowings. Need actual source documents	
35	Last 3 years of sinking fund and bond expenditures (please provide in hard copy and spreadsheet format)	
36	Long term capital plan	
37	Cash flow forecast for next 12 months (please provide in hard copy and spreadsheet format)	
38	Number of charter schools in district and near district boundaries	
39	Choice policy	
40	Pay to play policy	
41	Business operating procedures	
42	Tuition calculation spreadsheets if district operates a special education center program	
43	Job descriptions as requested	
44	Report identifying W2 total by person for last two fiscal years. Format: name, position, FY15 W2 total, FY14 W2 total, variance. Sort in descending order for FY15 (please provide in hard copy and spreadsheet format)	
45	Report identifying grants received (title and dollar amount), amount spent against grant, carryover amount and indirect costs paid for each of the past two fiscal years (please provide in hard copy and spreadsheet format)	
46	Report identifying number of open workers comp cases and reserves set aside for each case	
47	Last quarterly report received that identifies who has received unemployment	

3b. District Questions

Date Started

Date
Completed:

#	Question	Response	Completed by:
1	List of schools chartered by District and associated grade configuration		
2	Name of SIS solution and hosting provider, if applicable	Software Name: Version: Hosted or on-premise? Hosting provider, if applicable: Annual cost:	
3	Name of FMS solution and hosting provider, if applicable	Software Name: Version: Hosted or on-premise? Hosting provider, if applicable: Annual cost:	
4	How many internet connections are in place in the district What were your internet costs for the past 2 years		
5	Identify whether the following services are outsourced. If the services are outsourced, please identify the provider	Substitute Teachers: Custodial: Grounds: Maintenance: Transportation: Food Service: IT: Clerical: Other outsourced services?	
6	Is there a maintenance of effort concern for Special Ed?		
7	Is the District a School of Choice district?		
8	What is size of the district, in square miles		
9	How many pools does the district own?		
10	How many ice rinks does the district own?		
11	Do you have a business operating procedure manual? If so, please provide		
12	What cooperative purchasing programs are used?		
13	Is the district the policy holder for health care insurance?		

3c. Data Collection - Non District

<u>ITEM</u>	<u>POTENTIAL SOURCE</u>
Bulletin 1014 PDF version	MDE website
Bulletin 1014 underlying datafile	MDE website
Bulletin 1011 PDF version	MDE website
Bulletin 1011 underlying datafile	MDE website
Collective bargaining agreements	Peer district websites
REP staffing data	MI School Data website - Data Files - Staffing Information
SE-4094 for prior 3 years	MI School Data website - Data Files - Financial Reports
SE-4096 for prior 3 years	ISD
Salary surveys	ISD
Facilities survey including acreage, instructional sq footage and total sq footage, utility consumption	MSBO Survey
Transportation metrics	MSBO survey
FID submission including object codes	MDE / CEPI - will require special request to State

4. Financial Practices

Date Started

Date Completed:

Examine financial practices, including examination of compliance with Uniform Budgeting and Accounting Act, budget to actual expense report monitoring and budget amendment practices after budget adoption

Complete the following activities

Action #	Action	Comments	Completed by:
1	Review budget adopted for June 30, _____ year end and determine that the original budget did not adopt a deficit (overall deficit) budget		
2	Review budget amendments filed during the June 30, _____ year and determine the budget amendments did not indicate a deficit fund balance for June 30		
3	To the extent a deficit budget was adopted, verify the Board of Education (or other district representative) notified the Michigan Department of Education that a deficit was expected		
4	Verify that the budget contained within the district's financial system matches the Board adopted budget		
5	Verify that the budget contained within the district's financial system matches the budget in MEG		
6	Verify that the budget contained with the district's financial system matches the bond and/or sinking fund monies		
7	Pull _____(Number) of Board of Education meeting packets and verify the Board was provided with budget to actual information on a consistent basis		
8	Verify the district posted their budget on their website as required under the transparency provisions of the State Aid Act		
9	Verify the district posted budget amendments within 15 days of their adoption to their website as required		
10	Identify the areas that had a negative budget variance of 3% or more in the past completed fiscal year		
11	Are there prior year adjustments expected due to MTT adjustments in the past 36 months. If so, explain		
12	Are you anticipating a prior year adjustment due to previous year special ed overpayment by the State		
13	Identify the percentage of grant money spent each year for the past 2 fiscal years.		
14	Identify the amount of grant carryover funds by grant for this fiscal year		
15	Identify the indirect costs paid to the general fund (from grants) for each of the past two fiscal years		
16	Do you anticipate / are you aware of any grant repayments due to disallowed costs? If so, how much, when and why		
17	Confirm that business operating procedures are in place. Are the procedures documented?		
18	Did you receive any one time revenue in the prior 2 years (eg. Sale of property). If so, how was it booked (which fund / account)		
19	Did the district incur any one time expenses in the prior 2 years? If so, please identify purpose and amount		
20	Does the district anticipate any one time expenditure or revenue for this fiscal year? If so, please identify purpose, amount and timing		

5. Staffing

Date Started

Date Completed:

Examine staffing and a comparison of staffing to peer districts (see tab 2).

Complete the following activities

Action #	Action	Potential data source	Comments	Completed by:
1	Calculate students per total staff FTE for district and peers	REP		
2	Identify students per teacher for district and peers	Bulletin 1014		
3	Calculate students per teacher FTE for district and peers	REP		
4	Calculate students per central office administrator	REP		
5	Calculate students per central office administrator FTE for district and peers. Break down by the following key functional areas: - Students / Instruction Administrator - Students / Business Administrator - Students / HR Administrator - Students / IT Administrator - Students / Total Central Office Administrator	OPTIONAL - if necessary. Survey peer districts. Note - conversations with peer districts will likely be required to distinguish between administrator, professional and support staff	Complete only if Instruction Support, Business & Admin expenditures per pupil (bulletin 1014) are higher than the peer average OR if General Administration, Business Administration expenditures per pupil (bulletin 1011) are higher than the peer average. See 9.6 and 9.7	
6	Calculate students per central office professional FTE for district and peers. Break down by the following key functional areas: - Students / Instruction professional staff - Students / Business professional staff - Students / HR professional staff - Students / IT professional staff - Students / Total Central Office professional staff	OPTIONAL - if necessary. Survey peer districts. Note - conversations with peer districts will likely be required to distinguish between administrator, professional and support staff	Complete only if Instruction Support, Business & Admin expenditures per pupil (bulletin 1014) are higher than the peer average OR if General Administration, Business Administration expenditures per pupil (bulletin 1011) are higher than the peer average. See 9.6 and 9.7	
7	Calculate students per central office support staff FTE for district and peers. Break down by the following key functional areas: - Students / Instruction support staff - Students / Business support staff - Students / HR support staff - Students / IT support staff - Students / Total Central Office support staff	OPTIONAL - if necessary. Survey peer districts. Note - conversations with peer districts will likely be required to distinguish between administrator, professional and support staff	Complete only if Instruction Support, Business & Admin expenditures per pupil (bulletin 1014) are higher than the peer average OR if General Administration, Business Administration expenditures per pupil (bulletin 1011) are higher than the peer average. See 9.6 and 9.7	
8	Calculate students per school administrator FTE for district and peers	Survey peer districts	Complete only if Total School Administration expenditures per pupil are higher than the peer average (bulletin 1011). See 9.5	
9	Calculate students per school support staff FTE for district and peers	Survey peer districts		
10	Calculate caseload per speech professional FTE for district and other districts under review	District, National benchmarks, other districts undergoing review in county		
11	Calculate students per guidance counselor FTE for district and other districts under review	District, National benchmarks, other districts undergoing review in county		
12	Calculate students per social worker FTE for district and other districts under review	District, National benchmarks, other districts undergoing review in county		
13	Calculate students per Psychologist FTE for district and other districts under review	District, National benchmarks, other districts undergoing review in county		
14	Calculate Special Ed pupils per professional FTE for district and peers	SE4096 for each district		
15	Calculate Special Ed pupils per aide FTE for district and peers	SE4096 for each district		
16	Calculate Special Ed staff per supervisory staff for district and peers	SE4096 for each district		
17	Calculate devices per IT Staff FTE for district and peers	Survey peer districts		
18	Calculate end users per IT Staff FTE for district and peers	Survey peer districts		
19	Provide teacher attrition rate for last 3 years			

Items in bold may occur in a later phase

Items in blue may be optional, depending on other calculations

6. Wages

Date Started:

Date Completed:

Examine wages and a comparison of wages to peer districts (see tab 2). Examine current and future cost of collective bargaining agreements

Complete the following activities

Action #	Action	Potential data source	Comments	Completed by:
1	Using a variety of sources including the district's collective bargaining agreements as well as those of other peer districts , calculate the average wage per classification	ISDs, Collective bargaining agreements, survey peers for central office administrators		
2	Using a variety of sources, identify the median wage per classification for district and peers	ISDs, Collective bargaining agreements, survey peers for central office administrators		
3	Using a variety of sources, identify the minimum / maximum wage per classification for district and peers	ISDs, Collective bargaining agreements, survey peers for central office administrators		
4	Review report from Finance identifying total wages by bargaining unit for each of the last 3 years. (requested in 3a)	District business office		
5	Review report from Finance identifying authorized staffing by position with funding source (requested in 3a)	District business office		
6	Review report from Finance identifying authorized staffing by labor group with funding source (requested in 3a)	District business office		
7	Identify the average teacher salary	District business office		
8	Review summary of all wage modifications by classification by year for the last 5 years (requested in 3a)	District HR		
9	Identify the number of employees paid at the minimum wage level	District business office		
10	Review schedule of employees limited to the hours they work as a result of receiving retirement funds through ORS (requested in 3a)	District HR		
11	Review the number of part time employees by classification that qualify for ACA (requested in 3a)	District HR		
12	Review the compensated absence accrual by bargaining unit for the last 3 years (requested in 3a)	District HR		
13	Review the average number of absences during the prior fiscal year for the following classifications: teacher, bus driver, paraprofessionals / instructional aides (requested in 3a)	District business office	Teacher: Bus Driver: Para Pros / Instructional Aides:	
14	Review the amount paid for substitute teachers for the prior 3 fiscal years	District provided report		
15	Identify substitute teacher expenditures per pupil (1870, 1xx, 221, 3xx) and compare to average of peer districts	Download from MDE		
16	Identify the number of long term (60+ day assignment) subs were used during the prior year	District HR		
17	Identify the total overtime paid by function for the prior year	District business office		
18	Identify the number of teachers that are at the top step of their column	District business office		
19	Identify the cost of a vertical step for each of the last 3 years; compare to same for peer districts	District business office, peer CBAs		
20	Identify the cost of a lane for each of the last 3 years; compare to same for peer district	District business office, peer CBAs		
21	Identify the classifications that receive stipends and what was the total cost of stipends paid last fiscal year	District CBA and payroll system		
22	Identify the classifications that receive extra duty pay and what was the total cost of extra duty pay paid last fiscal year	District CBA and payroll system		
23	Identify what triggers overtime pay per the CBA by classification	District CBA		

7. Benefits

Date Started

Date Completed:

Examine benefits and compare to peer districts (see tab 2). Examine current and future cost of collective bargaining agreements

Please complete the following activities

Action #	Action	Potential data source	Comments	Completed by:
1	Calculate benefits as a percentage of salaries for the LEA and peer districts (see tab 2) for the following areas: - Instruction - Support Services	Bulletin 1011 (Download underlying data for Bulletin 1011 to get district level data)		
2	Calculate benefits as a percentage of salaries for LEA and peer districts (see tab 2): - Health - Dental - Vision - Workers comp - Unemployment	ISDs, Collective bargaining agreements		
3	Identify the last time the District solicited proposals for health care insurance	District HR		
4	Does the District adhere to a hard cap on employer contributions or 80/20%?	District HR		
5	If hard cap, identify the cap amount (Statutory or less?)	District HR	Single: Dual: Family:	
6	Is there a sick leave payment policy in place? If so, determine the payout	District HR		
7	Is sick leave paid to retirees only or resignations as well?	District HR		
8	Determine whether vacation accrual is capped (identify by bargaining unit)	District HR, CBA		
9	Conduct a high level review of insurance offerings and compare to peers	District insurance offerings, district websites		
10	Identify whether staff are paid for snow days by bargaining unit	CBAs from website		
11	Review minimum qualification for benefits for each classification; compare to peers	CBAs from website		
12	Identify minimum work guarantees (e.g., transportation) and calculate associated cost of benefits / additional pay	District CBA and interviews with supervisors		
13	Identify paid time off by classification and calculate total possible cost for current fiscal year	District CBA		
14	Identify workers comp costs per employee (2840, 1xx-3xx, 45x) and compare to average of peer districts	Download from MDE		
15	Calculate unemployment comp costs per employee (2850, 1xx-3xx, 45x). Identify anticipated costs for this year. Identify anticipated unemployment costs for next year	Download from MDE; forecast from district		
16	Identify whether staff receive unemployment costs during the summer? If so, to what extent	District business office		
17	Review report identifying number of open workers comp cases and reserves set aside for each case	District-provided report (tab 3a)		
18	Review the last quarterly report identifying who has received unemployment	District provided report (tab 3a)		

8. Facilities including Utilization Deferred Maintenance

Date Started

Date Completed:

Examine building utilization for each school. Examine deferred maintenance and capital investment needs

Please complete the following activities

Action #	Action	Potential data source	Comments	Completed by:
1	Calculate the % utilization (students / building capacity) by building for each of the last 3 years	District facilities for building capacities; district ERP for student enrollment by facility		
2	Contact municipalities to identify housing starts. Compare to building capacity / utilization	Municipalities		
3	Is the district renting facility space from others? If so, identify building and purpose	District business office		
4	Is the district renting out district-owned facilities / space? If so, identify building and purpose and the rental income for the last 3 years	District business office		
5	Are custodial services included in the rent charged to outside organizations?	District business office		
6	Identify all closed / unused district-owned facilities	District facilities department		
7	Identify whether there a disposition plan in place for unused facilities	District facilities department		
8	Identify all facilities / boilers / playground / bleachers that received citations in the past 3 years	District facilities department		
9	Has the district completed a facility condition assessment and physical asset inventory in the past 24 months? If not, request that these activities be completed	District facilities department		
10	Review facility condition assessment; identify any areas that are in critical need of addressing within next 36 months	District provided within last 24 months		
11	Review IT inventory and associated age. Identify any devices in critical need of replacement within next 36 months	District provided within last 24 months		
12	Review IT infrastructure and associated age. Identify items in critical need of replacement within next 36 months	District inventory		
13	Do you have an emergency operating plan (includes both security and disaster response) for each building? List buildings that do not have a plan in place.	District facilities department		
14	Identify actions take regarding energy conservation	District facilities department		
15	Determine whether the district purchases utilities (gas, electric) on the open market	District facilities department		

9. Non Instructional

Date Started

Date Completed:

Examine non-instructional costs by function and compare to peers (see tab 2)

Please complete the following activities:

Action #	Action	Potential data source	Comments	Completed by:
1	Download underlying data file for Bulletin 1011			
2	Calculate Pupil services per pupil expenditure (21x) for LEA and peers (see Tab 2). Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
3	Calculate Instructional staff services per pupil expenditure (22x) for LEA and peers. Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
4	Calculate Instructional Related Technology (225) per pupil expenditure for LEA and peers. Identify significant variances between LEA and the average of the peers.	Request FID files from CEPI / MDE		
5	Calculate School Administration per pupil expenditure (24x) for LEA and peers. Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
6	Calculate General administration per pupil expenditure (23x) for LEA and peers. Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
7	Calculate Business services per pupil expenditure (25x) for LEA and peers. Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
8	Calculate Operations & Maintenance per pupil expenditure (26x) for LEA and peers. Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
9	Calculate Transportation per pupil expenditure (27x) for LEA and peers. Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
10	Calculate Other support services per pupil expenditure (28x, 292, 294-299) for LEA and peers. Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
11	Calculate Total current operating expenditures per pupil for LEA and peers. Identify significant variances between LEA and the average of the peers.	Bulletin 1011		
12	Identify cost per rider for RE, SE and overall for LEA and peers. Compare LEA to average of peers AND compare to appropriate region in MSBO survey.	SE4094 for LEA and peer districts, MSBO Transportation Study		
13	Identify cost per bus for RE, SE and overall for LEA and peers. Compare LEA to average of peers AND compare to appropriate region in MSBO survey.	SE4094 for LEA and peer districts, MSBO Transportation Study		
14	Calculate number of buses per mechanic for LEA. Compare to appropriate region in MSBO survey	MSBO Transportation Study		
15	Calculate % of transportation costs spent on field trips / athletic trips	District transportation office		
16	Identify the number of non-public schools students transported by LEA and peers	SE4094 for LEA and peer districts - Calculate if district costs are higher than peers for items 9.12 - 9.15		
17	Identify transportation costs associated with center programs	District financial system		
18	Identify transportation costs associated with transporting homeless students	District transportation office		
19	Calculate average age and number of miles for active fleet of buses	District transportation office		
20	Identify maintenance cost as % of expenditures. Compare to appropriate region in MSBO survey	Individual district provided data compared to MSBO survey		
21	Identify maintenance expenditures per student. Compare to appropriate region in MSBO survey	Individual district provided data compared to MSBO survey		
22	Identify maintenance expenditures per sq ft of instructional space. Compare to appropriate region in MSBO survey	Individual district provided data compared to MSBO survey		
23	Identify utilities cost per sq ft of instructional space. Compare to appropriate region in MSBO survey	Individual district provided data compared to MSBO survey		
24	Calculate square footage per custodial FTE. Compare to appropriate region in MSBO Survey	Individual district provided data compared to MSBO survey		
25	Calculate square footage per skilled trades FTE. Compare to appropriate region in MSBO Survey	Individual district provided data compared to MSBO survey		
26	Calculate square footage per grounds FTE. Compare to appropriate region in MSBO Survey	Individual district provided data compared to MSBO survey		

9. Non Instructional

27	Calculate the IT operational spend per student	Peer surveys		
28	Calculate the IT spend per end user	Peer surveys		
29	Identify the amount of money applied for and received through the USF eRate program for the last 3 years	District technology office		
30	Identify amount of transfers between Food Service and general fund for last 3 years	District financial system		
31	Identify the fund to which lunch aides are charged	District financial system		
32	Identify the average internet bandwidth per student	District IT		
33	Identify the internet bandwidth availability per device	District IT		

10. Enrollmt Proj

Date Started

Date Completed:

Examine enrollment projections methods and history

Complete the following activities

Action #	Action	Potential data source	Comments	Completed by:
1	Compare projected enrollment to actual for past 5 years	Enrollment projections, district ERP		
2	identify methodology used for projections - by building or district overall	Enrollment projection report		
3	Identify number of residents attending other schools for past 3 years to identify trend	Instruction Department		
4	Identify number of non-resident / school of choice attending district for past 3 years to identify trend	District SIS		
5	Review the number of 105 / 105c students by category for last year	District provided report (see tab 3a)		
6	Identify the number of students attending a CFE campus last school year; how many slots were allocated to the district	Instruction Department	# of AM students: # of PM students: Slots allocated:	
7	Identify the percentage of GSRP-funded pre-school slots have been used for each of the past 3 years	Instruction Department		

11. Other

Date Started

Date Completed:

Please complete the following activities

Action #	Action	Potential data source	Comments	Completed by:
1	Identify the total expenditures for athletics for the prior fiscal year	District business office		
2	Identify the total income for athletic events including concessions, pay-to-play and tickets	District business office		
3	Determine the amount, if any, collected for pay to play last school year			
4	Are athletics offered at the middle school level	Athletic director		
5	List the sports offered at the HS	Athletic director	Boys: Girls:	
6	Does the district have a full time, dedicated athletic director?	District HR		
7	Does the athletics program have a dedicated secretary / assistant?	District HR		
8	Determine whether the district has offered an early retirement incentive in the past 5 years. If so, obtain a copy of the debt service associated with the ERI	District HR		
9	Determine whether there is long term debt not supported by a dedicated millage (e.g., energy, performance bonds, etc.)	District business office		
10	Identify the special instructional programs in place which cost more than the typical classroom per pupil cost at a given grade level (e.g., IB, AP, foreign language immersion programs, 1 to 1 computing, elementary foreign language). Provide the student / teacher ratio for each program			