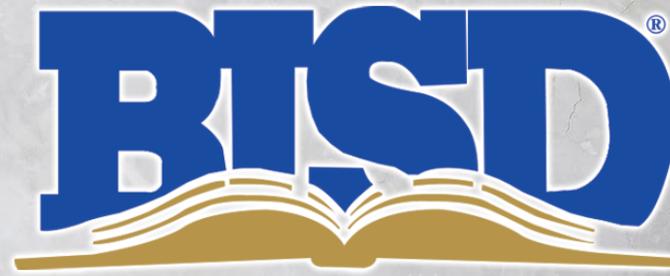


Birdville ISD 2022 Bond Planning Committee

February 7, 2022

- Meeting's Structure
- Process Tools
- History of Birdville ISD Bond Referendums
- Public School Finance 101



Birdville ISD Mission ...

The mission of BISD is to ensure that all students position themselves to excel with integrity in an ever-changing global society through innovative and responsive learning environments.



Your Birdville ISD Superintendent ...



Dr. Gayle Stinson



Birdville ISD Board President ...



Mr. Joe Tolbert



Your Facilitator for the Birdville ISD Bond Planning Committee 2022 ...

Mark Vander Voort, AIA, LEED AP
ATKINS Planning & Design

- *Experience*
- *Role – Planning Process Monitor & Advisor*
- *Goal – Peak Committee Performance*

Contact Info:

mark.vandervoort@atkinsglobal.com

972-571-6492



GOAL: Peak Performance for the Birdville ISD Bond Planning Committee ...

- Maintain order during discussions.
- Agree upon Norms of Behavior (Ground Rules).
- Allow time to process complex information.
- Assure equitable and uniform communications.
- Convey how decisions will be made.
- Provide clarity on the process.
- Honor all members, honor all input.



Facilitation TOOLS:

- General Meeting Agenda/Guidelines
- Review Purpose/Charge/Objectives
- Ground Rules for Behavior
- Values to Respect
- Planning Process
- Recap – *Likes and Wishes*



General Meeting Guidelines

- All presented information will be distributed to you as handouts.
 - Keep in your binder, also posted on website – birdvilleschools.net/BPC2022
- No personal needs breaks are scheduled due to time constraints.
 - Please take breaks as needed.
- Ask any questions you may have.
 - Frequently Asked Questions (FAQs) and answers will be posted on website.



Committee Meeting Attendance

- Attendance at every meeting will yield optimal results for Committee and community.
- Those who may miss three consecutive meetings will no longer receive further meeting notifications.
- Catch-up work is the responsibility of Committee member.
- No Committee time will be allocated for catch-up or remediation due to complex/sequential nature of presentations.
- Committee Roster – available in your binder.



General Meeting Task Cycle

- **Purpose**

Review the need for capital projects, timelines, and costs. The Committee counsels and provides input to the administration and presents findings and recommendations to the Board of Trustees *for consideration of a November 2022 bond referendum.*

- **Charge**

Become informed of current Birdville ISD needs and goals and design a bond referendum proposal that supports District goals, meets student needs, reflects good stewardship, and can be supported by the Birdville community.

- **Objectives**

Outcomes planned for the meeting.

- **Tasks**

Step-by-step listing of meeting activities.

- **Recap**

Likes and Wishes, Handouts, Next Steps.



Objectives for Tonight

- Aligned Workgroup; Cohesive Owners of 2022 Bond Planning Committee Work
- Superintendent's Welcome
- Board Charge
- Shared Values
- Ground Rules or Norms
- Accept Decision-Making Model
- Clarity on Process and Group Dynamics
- Review of 2022 Bond Planning Committee Charter and Acceptance of Work
- History of Birdville ISD Bonds and Projects
- School Finance 101
- Recap/Overview of Subsequent Meetings



Ground Rules

- How will we work together on this historic project?
- Try thinking backwards ...
 - What would make these meetings a disaster?
- Ground Rules to consider ... please inform group of agreement or concerns.
 - Agree to all of them?
 - Some of them?
 - Add to them?
 - Take any away?



Ground Rules

- One conversation at a time – no sidebars.
- Honor the time contract – the time we have together.
- Stay on topic and task.
- Share ideas freely – no recriminations.
- Listen to understand; respect input of others.
- Think holistically. Set aside personal agendas. Consider the whole district.
- Be kind. Be honest. Treat others as you would like to be treated.
- Be relentless in pursuing consensus.
- Share in conversations – at tables and in large group.
- Silence electronic devices.
- **HAVE FUN!**



BISD Bond Planning Committee Charter

- May we agree to the Charter?
- Take a moment at your tables to review the Charter for the 2022 BISD Bond Planning Committee ...



Decision-Making Process

- How will we make decisions?
- “If we don’t decide now, someone will do it for us later.”



80% Rule

- Seek consensus!
- If after discussion, it is not achievable, 80% agreement will constitute a Sustainable Decision.

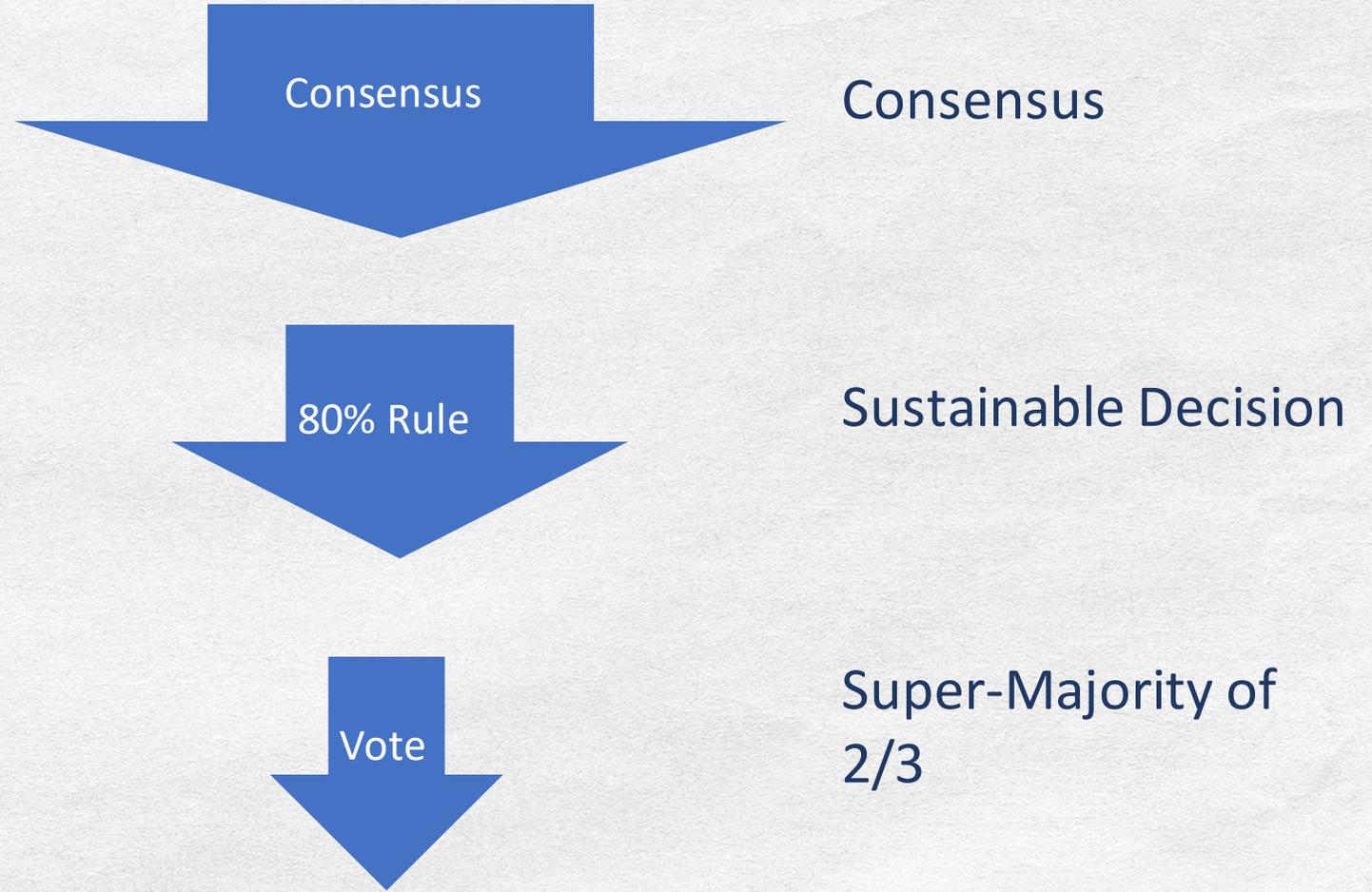


Vote

- If a sustainable decision is not achievable, then a Super-Majority vote of two-thirds (67%) of the Committee will constitute a decision.
- (Even a Super-Majority vote is still the least desirable process for our Committee.)
- *Seek consensus!*



Proposed Decision-Making Model



Consensus and Gradients of Agreement ...



This is the Community At Work Gradients Of Agreement Scale.

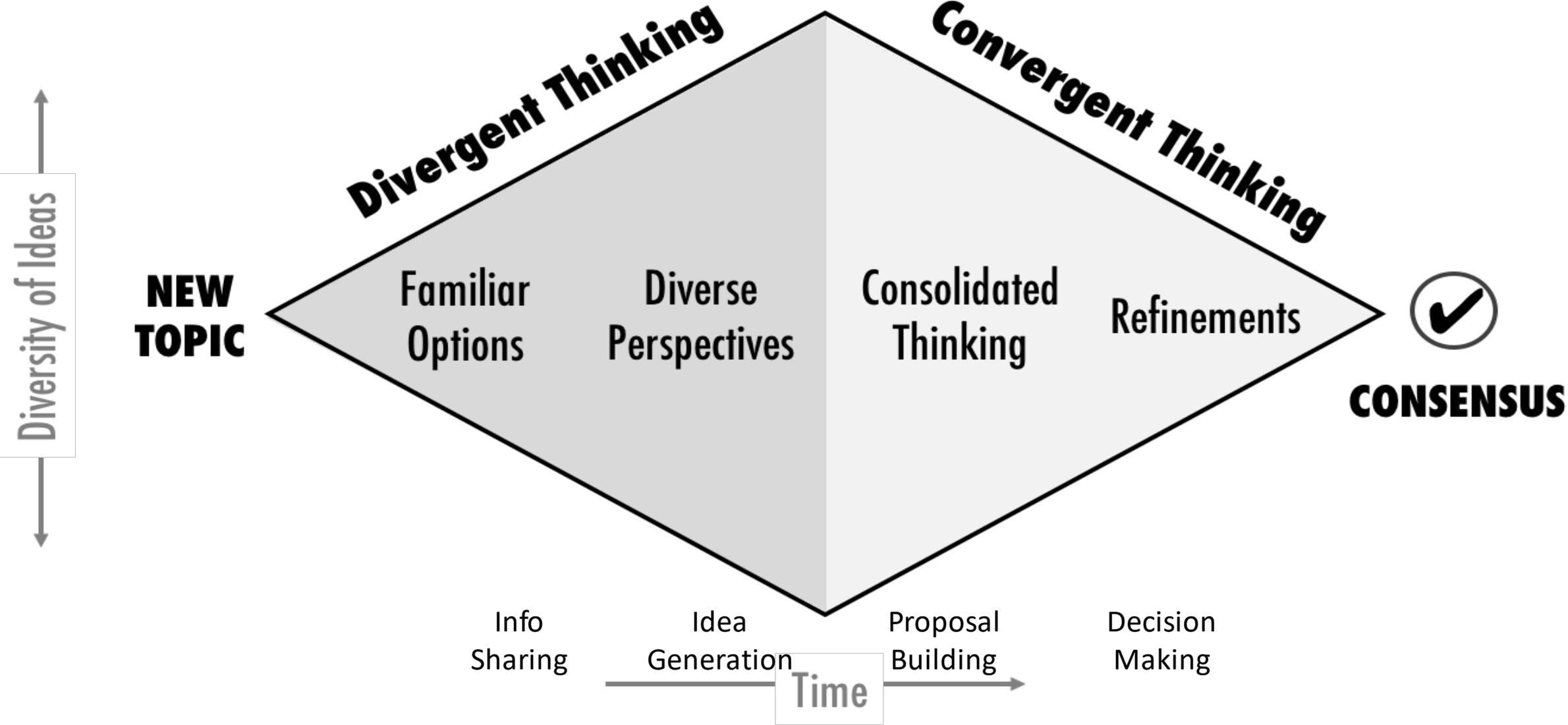
This scale makes it easier for participants to be honest. Using it, members can register less-than-whole-hearted support without fearing that their statement will be interpreted as a veto.

Shared Values for this Work

- Understand dynamics of a Group Decision-Making process.
 - Divergent to Convergent Thinking Diagram
- We will be uniform and fair in our decision-making.
- We will have time to process information and to ask questions.



Dynamics of Group Decision-Making



General Process We Shall Follow

- We will be presented complex school finance information by District and external professionals.
- We will gain an understanding and insight into District needs through presentations by demographers and professionals in several different meetings.
- We will be given a spreadsheet with projects and associated costs when all presentations are complete.
- We will be informed of the District's financial capacity in Meeting #3.
- We will deliberate and make decisions individually at our tables – in groups of eight, then four, then collectively.
- We will reach consensus on a Bond Referendum that we consider viable in the community, represents good stewardship, and meets the needs of our District/students.
- We will present that proposed referendum to the Board of Trustees who have the final decision on the Bond election.



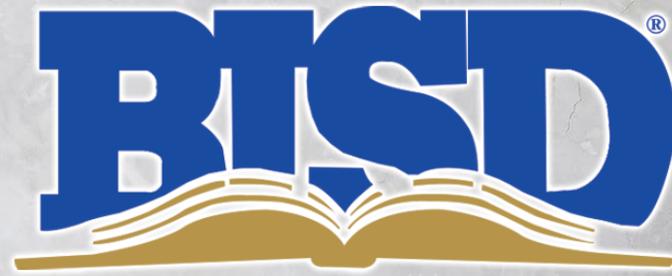
Introductions

- Committee Member Introductions at your tables.
(10 minutes total)
- Who are you?
 - Your role in the community or Birdville ISD.
 - Do you have children at Birdville ISD Schools?



2018 Bond Program

- Project Highlights



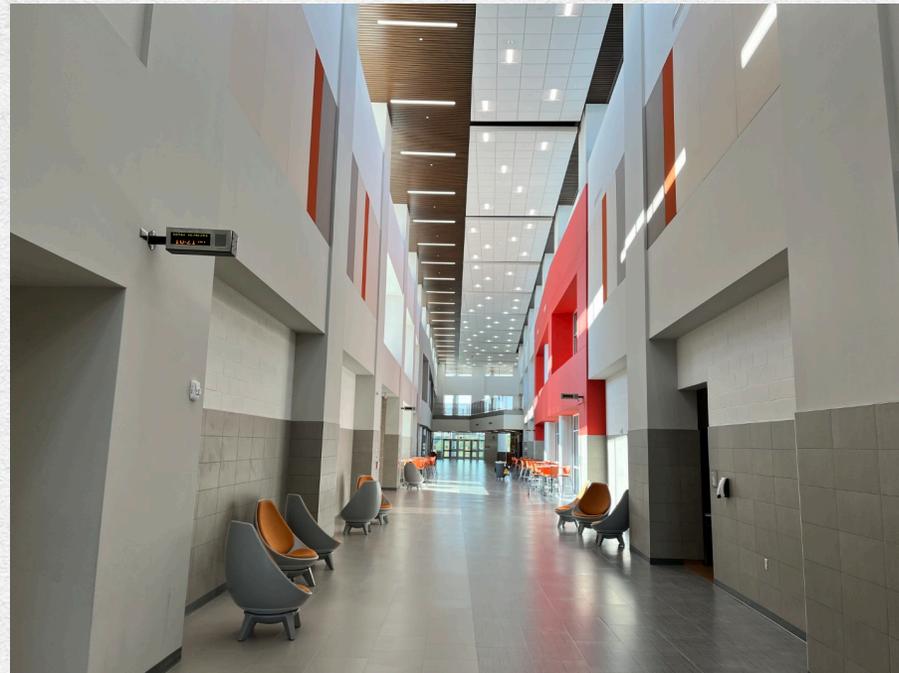
2018 Bond Program – HMS 1

- Haltom Middle School Replacement



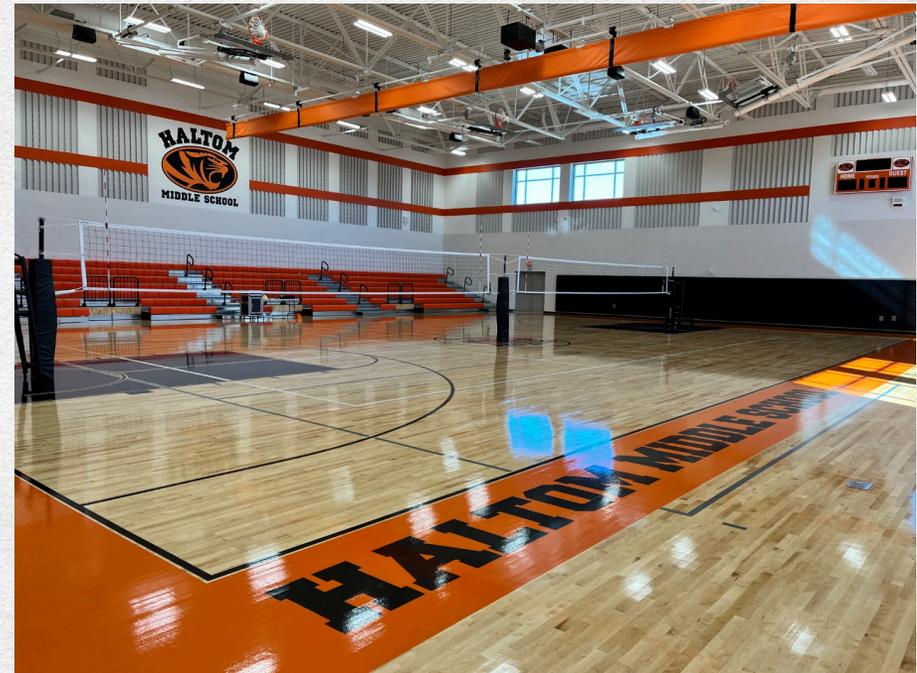
2018 Bond Program – HMS 2

- Haltom Middle School Replacement



2018 Bond Program – HMS 3

- Haltom Middle School Replacement



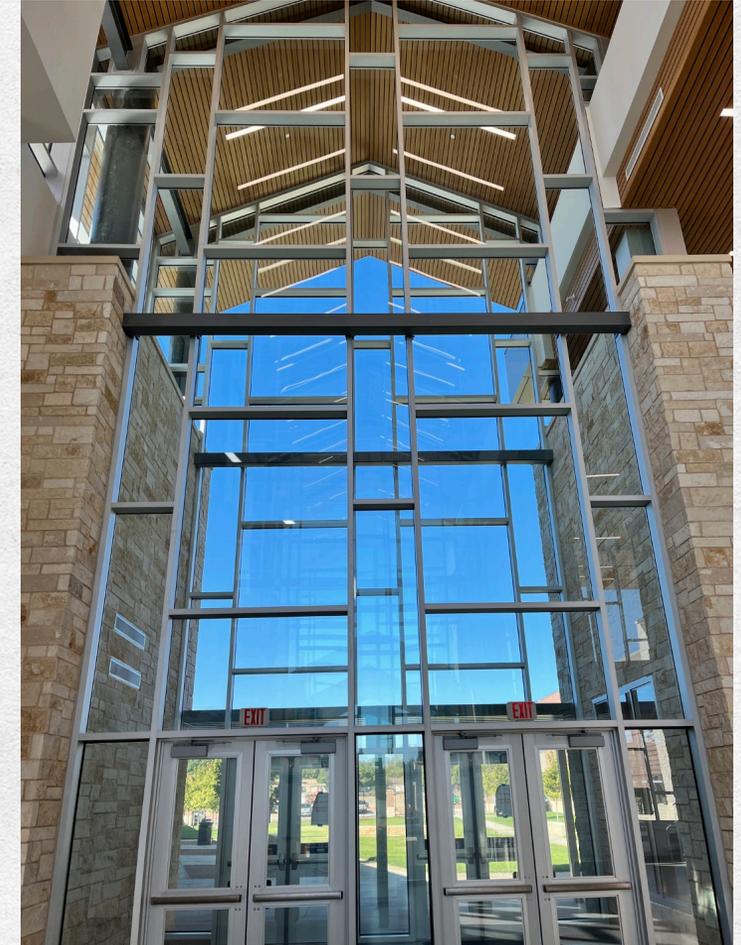
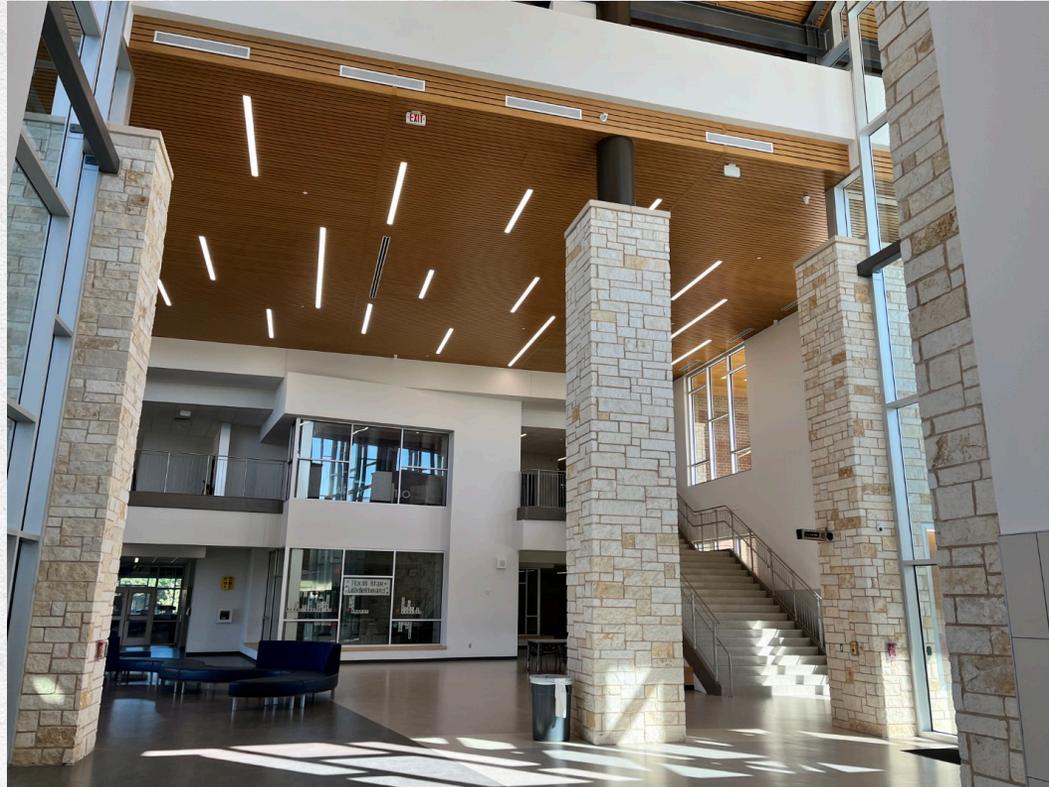
2018 Bond Program – RMS 1

- Richland Middle School Replacement



2018 Bond Program – RMS 2

- Richland Middle School Replacement



2018 Bond Program – RMS 3

- Richland Middle School Replacement



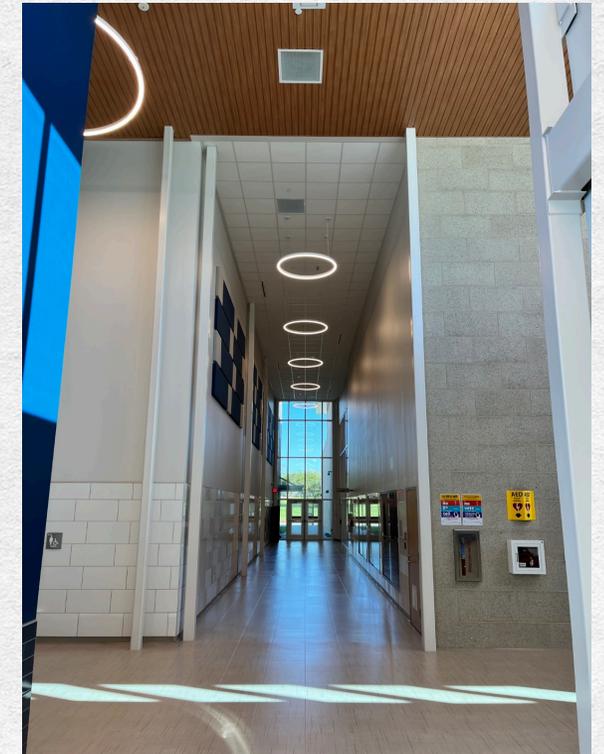
2018 Bond Program – Cheney Hills 1

- Cheney Hills Elementary and Pedestrian Bridge



2018 Bond Program – Cheney Hills 2

- Cheney Hills Elementary and Pedestrian Bridge



2018 Bond Program – Cheney Hills 3

- Cheney Hills Elementary and Pedestrian Bridge



2018 Bond Program – Cheney Hills 4

- Cheney Hills Elementary and Pedestrian Bridge



2018 Bond Program – Smithfield Elem 1

- Smithfield Elementary School Replacement



2018 Bond Program – Smithfield Elem 2

- Smithfield Elementary School Replacement



2018 Bond Program – Smithfield Elem 3

- Smithfield Elementary School Replacement



2018 Bond Program – SMS 1

- Smithfield Middle School Gymnasium Addition



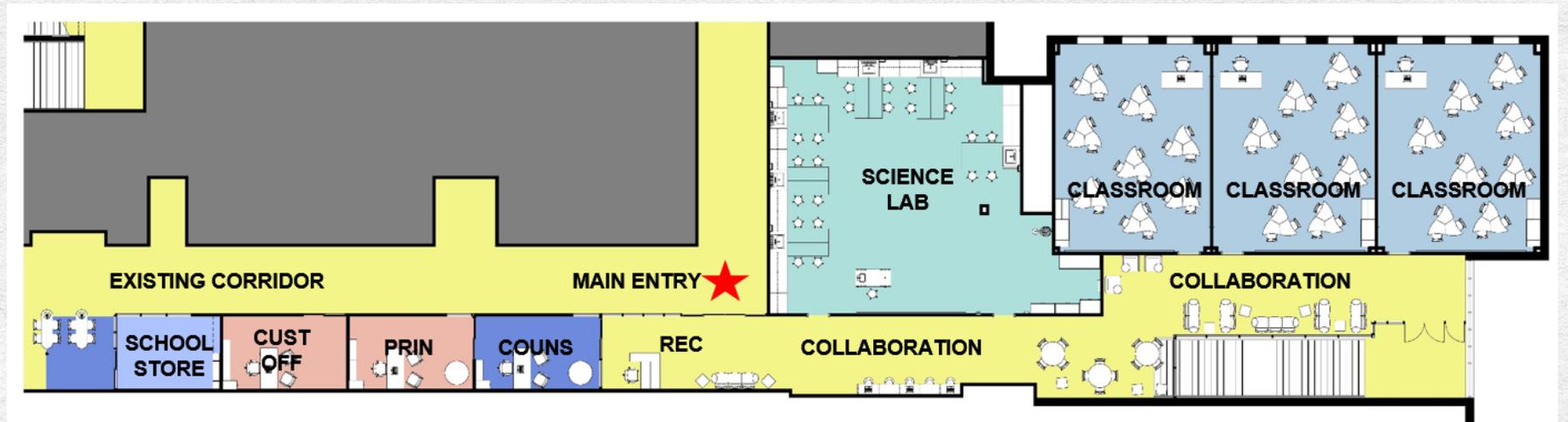
2018 Bond Program – SMS 2

- Smithfield Middle School Gymnasium Addition



2018 Bond Program – CAB

- Collegiate Academy of Birdville



2018 Bond Program – HVAC/Roofing 1

- HVAC and Roofing Upgrades



2018 Bond Program – HVAC/Roofing 2

- HVAC and Roofing Upgrades



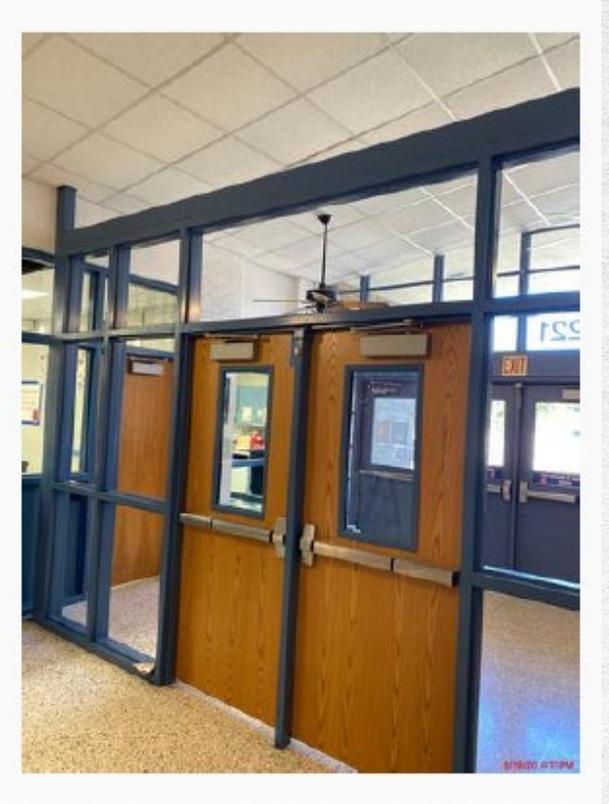
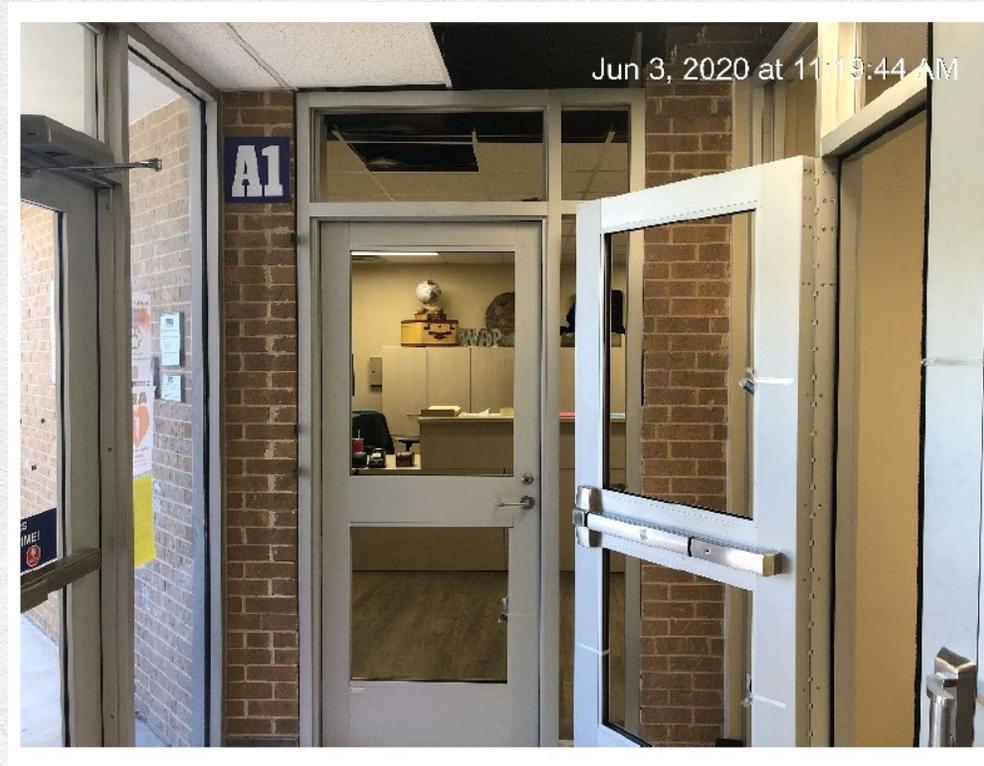
2018 Bond Program – High Schools

- High School Auditorium Upgrades

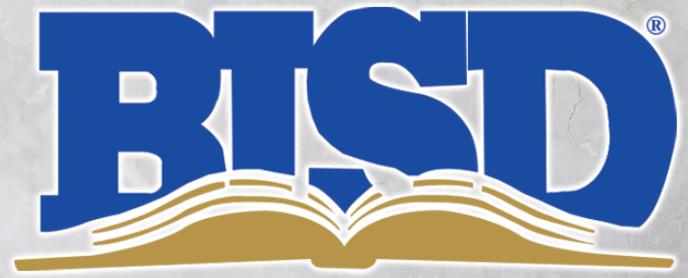


2018 Bond Program – Entry Points

- Controlled Entry at Multiple Schools



Questions,
Comments,
& Feedback



Public School Finance 101 ... A Review

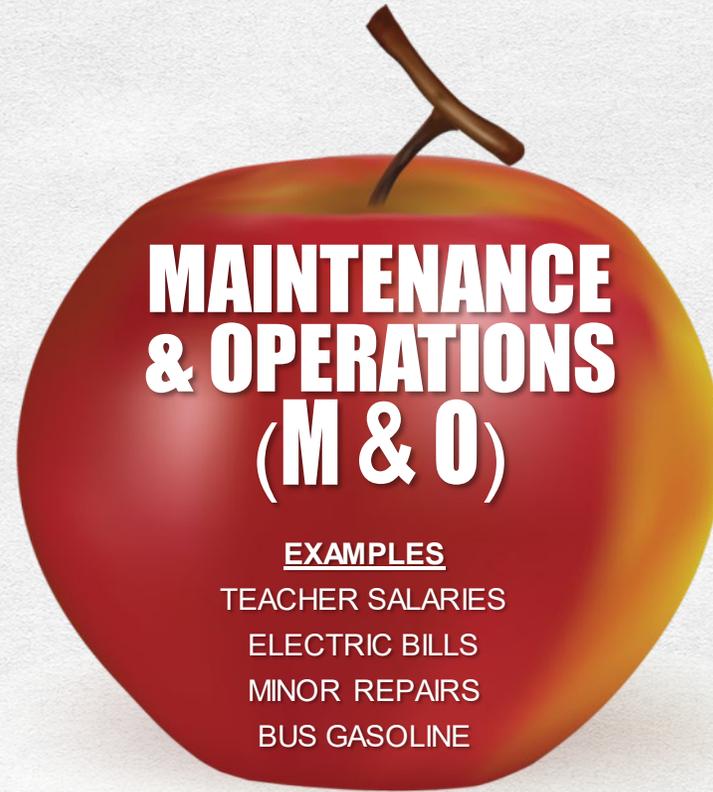


Katie Bowman, CPA
Associate Superintendent for Finance & Auxiliary Services

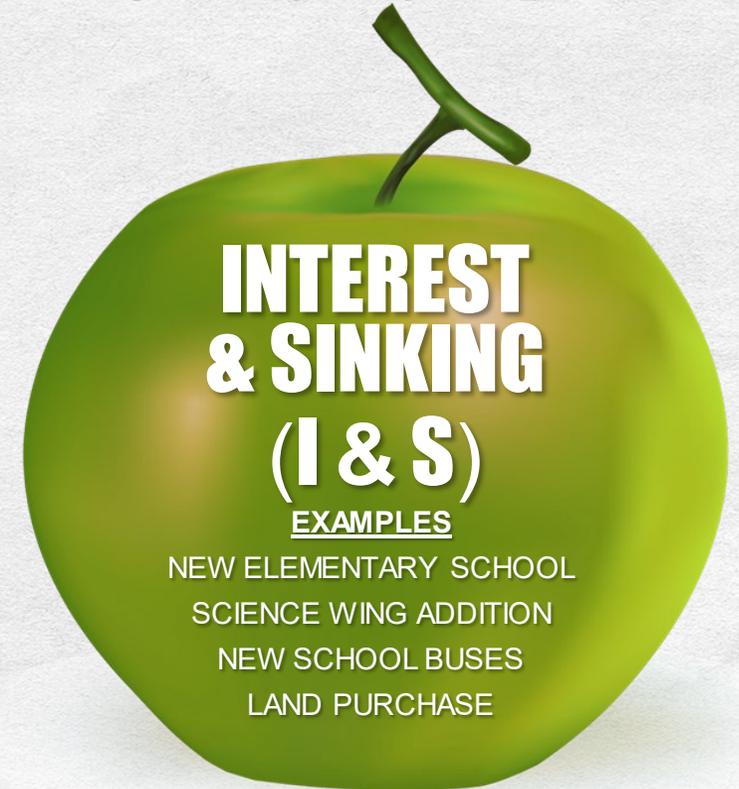


“HOW DO WE PAY FOR BISD?”

OPERATING BUDGET



“MORTGAGE”/DEBT





Four Major Resources Affecting School Funding

Enrollment



State Funding



Property Values



Tax Rates



General Fund Budget Development

General Fund Revenue Factors

- Enrollment
 - Average Daily Attendance (ADA)
 - ❑ Each attendance day generates approximately \$38 per student
 - Weighted Average Daily Attendance (WADA)
- Taxable Value of District
- Comptroller's Property Tax Division (CPTD) Values
 - Current Year's Tax Values
- State Funding Formulas
 - Basic Allotment of \$6,160 (no change since 2019–20)
- Proposed Tax Rate
 - **Maximum and Minimum changes each year**
 - Additional pennies available with voter approval



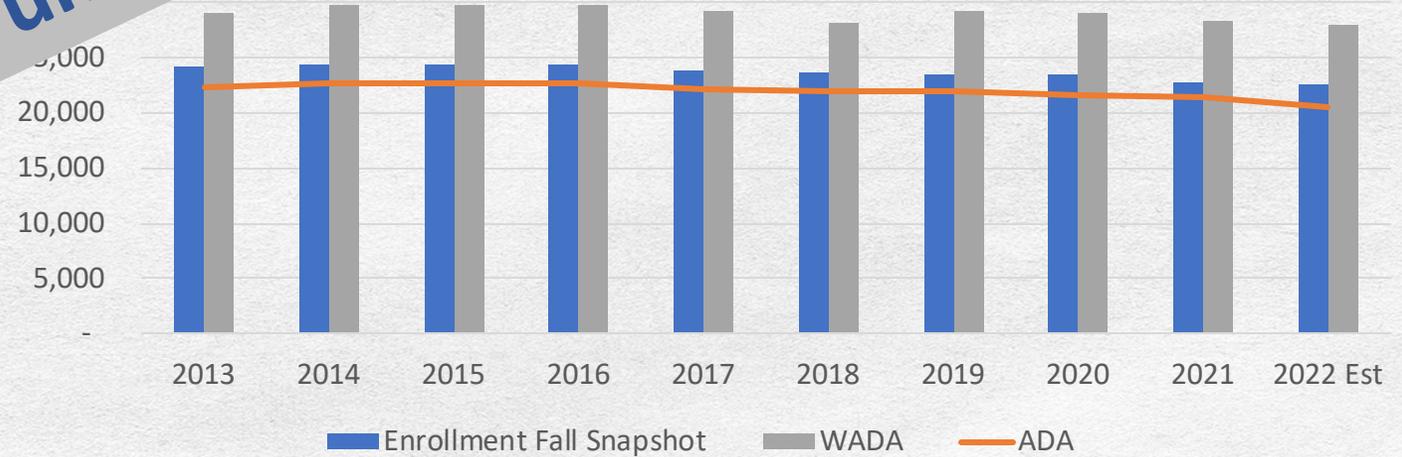
Enrollment

Fiscal Year	Enrollment Fall Snapshot	ADA	WADA
2013	24,119	22,376.20	28,968.31
2014	24,287	22,593.44	29,713.42
2015	24,356	22,671.65	29,777.99
2016	24,321	22,666.67	29,816.70
2017	23,802	22,180.00	29,713.42
2018	23,691	22,010.56	29,713.42
2019	23,388	21,958.00	29,713.42
2020	23,540	21,958.00	27,983.63
2021	22,759	21,958.00	28,396.65
2022 Est	22,759	21,958.00	27,983.63

2017 experienced a 1.5 percent decline with the loss of International Charter School in September 2017, a loss of \$1.5 million in General Fund Revenue.

Over the last two years the District has dropped around 1,000 students during COVID-19.

State Funding Follows the Student



Birdville ISD Tax Values

(in billions)

Fiscal Year	Taxable Values	Change
2013	\$ 7.20	2.28%
2014	\$ 7.40	2.78%
2015	\$ 7.70	4.05%
2016	\$ 7.70	0.00%
2017	\$ 8.50	10.39%
2018	\$ 9.50	11.76%
2019	\$ 10.40	9.47%
2020	\$ 11.60	11.54%
2021	\$ 12.20	5.17%
2022 Est	\$ 13.00	6.56%



Tax Compression

- House Bill 3 as passed by the 86th Texas Legislature
- Automatically lowers school district M&O rates when the state or local property tax base grows by more than 2.5 percent
- Districts should be held harmless by tax rate changes, but . . .
 - Based on tax values not tax collections
- Statewide average property growth estimated by Comptroller
 - If district values grow beyond that average, further compression occurs.
 - The Texas Education Agency calculates all district M&O rates in August of each year.
 - No tax rate can drop below 90 percent of the maximum compressed rate.



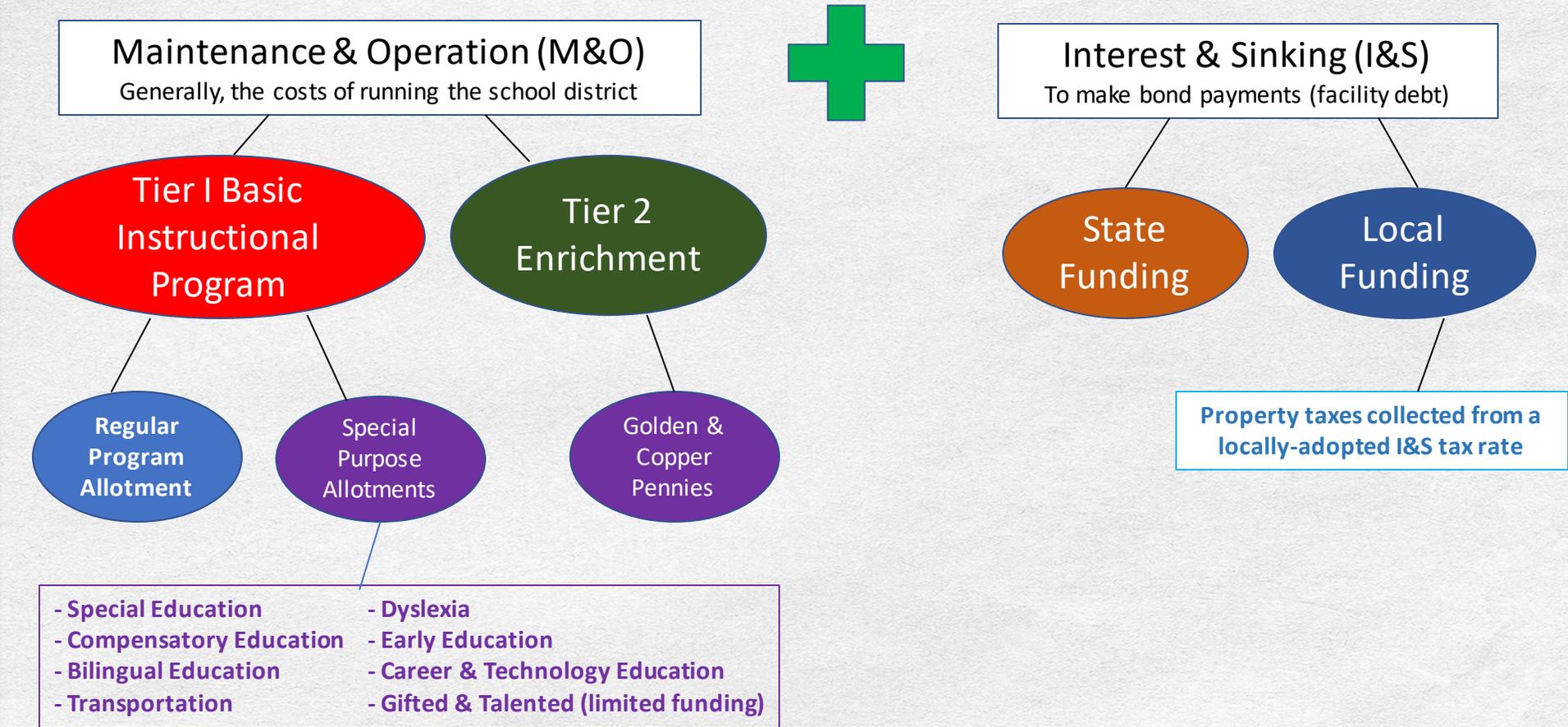
Birdville ISD General Fund (M&O) Tax Rates



Note: Capped at \$1.04 per \$100 of property value fiscal year 2007-08 through 2018-19



State Funding (M&O and I&S)



“SO, WHAT IF OUR PROPERTY VALUES GO UP 5%?”

Sally

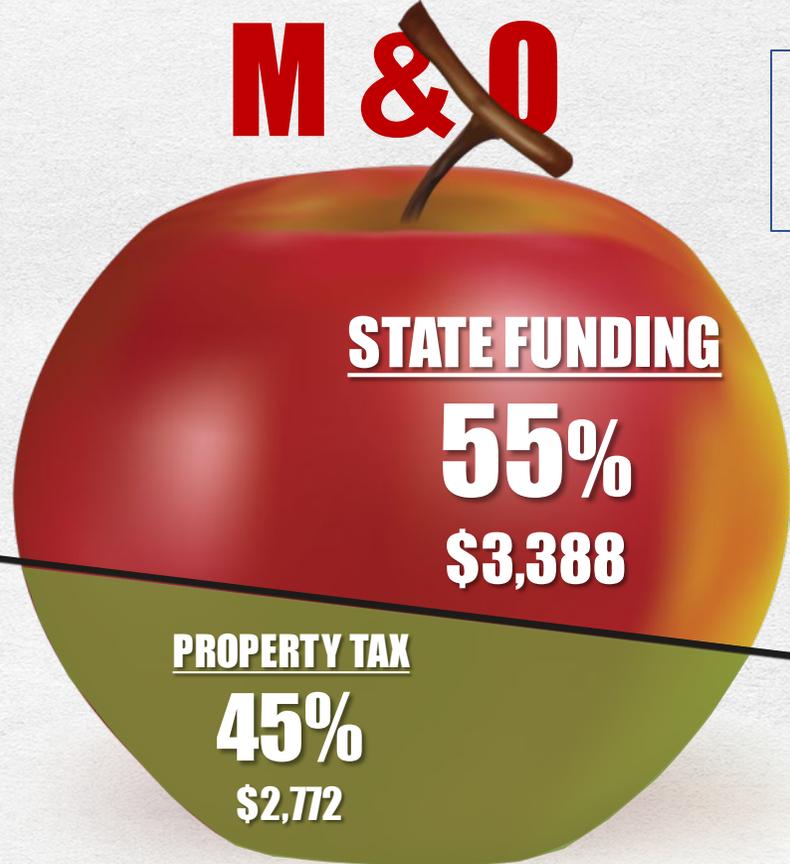


\$6,160



M & O

Example Year 1



"SO, WHAT IF OUR PROPERTY VALUES GO UP 5%?"

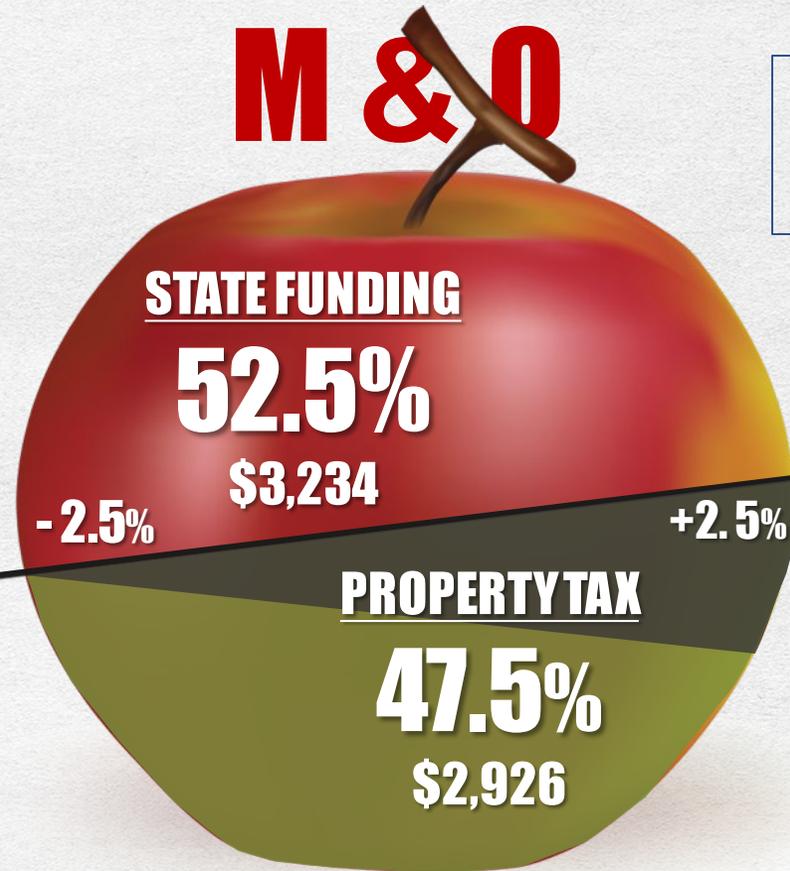
Sally



\$6,160

M & O

Example
Year 2



Tier I Funding

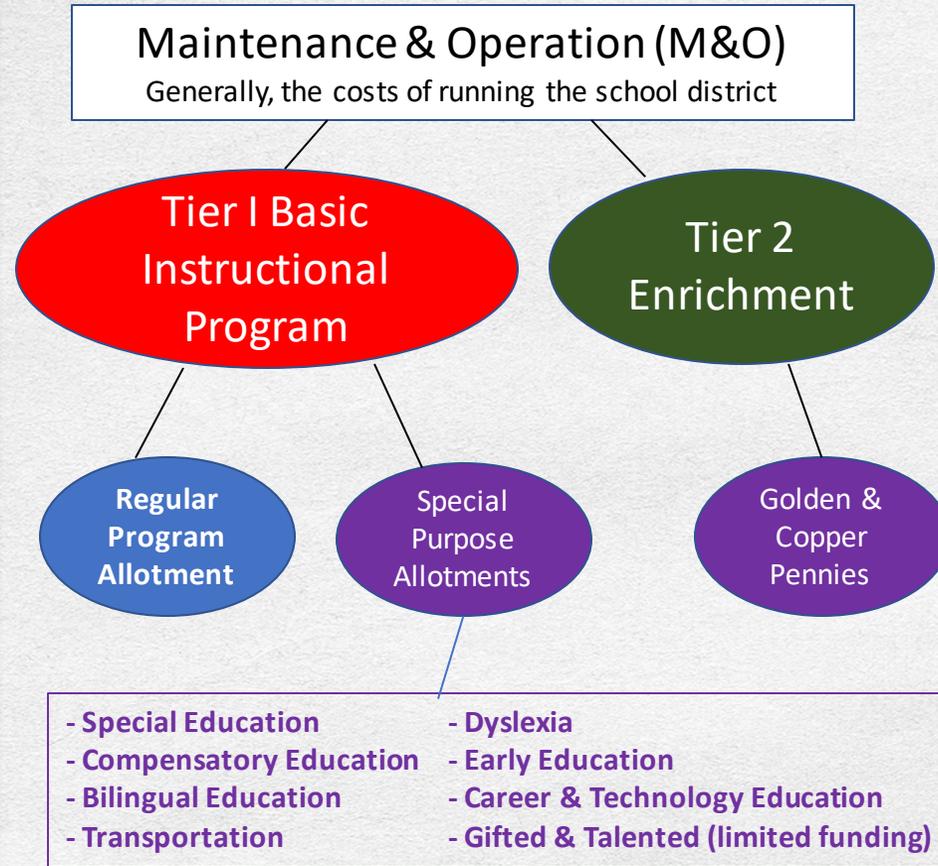
- 2022–23 FY Assumptions
 - No change in student population
 - No change in basic allotment
 - 2022–23 five percent property value growth
- No change in Tier I revenue
 - State Funding reduction of \$1.8 million

	2021–22 Tier I Funding	2022–23 Tier I Funding	
11-Regular Program Allotment	\$ 112,035,992	\$ 112,035,992	
23-Total Special Education Adjusted Allotment (Spend 55%)	17,746,386	17,746,386	
37-Dyslexia Allotment	1,076,152	1,076,152	
24-Comp Ed Allotment (Spend 55%)	20,029,808	20,029,808	
25-Bilingual Education Allotment (Spend 55%)	3,394,480	3,394,480	
22-Career & Technology Allotment (Spend 55%)	12,939,002	12,939,002	
36-Early Education Allotment	3,217,860	3,217,860	
21-Gifted & Talented Allotment (Spend 100%)	442,433	442,433	
38-College, Career, or Military Readiness Outcomes Bonus	1,214,000	1,214,000	
School Safety Allotment	199,464	199,464	
99-Total Transportation Allotment	960,832	960,832	
Other	186,929	186,929	
Total Cost of Tier I	\$ 173,443,338	\$ 173,443,338	
Less: Local Fund Assignment (based on current year values)	\$ 107,882,773	\$ 109,647,495	
State Share of Tier I	\$ 65,560,565	\$ 63,795,843	\$ (1,764,722)

District Share of Tier I over 60 percent



State Funding



M&O Local Property Tax Rate Funding Tiers

Tier I

**Compressed
M&O Tax Rate
(different for
every district)**

RECAPTURE
LEVEL 1

Tier II

LEVEL 1

**Eight Golden
Pennies
(Five available
for Birdville)**

NO RECAPTURE
Guaranteed at \$98.56

Tier II

LEVEL 2

**Nine Copper
Pennies
(Zero available
for Birdville)**

RECAPTURE
Guaranteed at \$49.28



Tier Funding

- Tier I Funding: Higher Property Wealth District Example

	2021-22
	Tier I Funding
11-Regular Program Allotment	\$ 112,035,992
23-Total Special Education Adjusted Allotment (Spend 55%)	17,746,386
37-Dyslexia Allotment	1,076,152
24-Comp Ed Allotment (Spend 55%)	20,029,808
25-Bilingual Education Allotment (Spend 55%)	3,394,480
22-Career & Technology Allotment (Spend 55%)	12,939,002
36-Early Education Allotment	3,217,860
21-Gifted & Talented Allotment (Spend 100%)	442,433
38-College, Career, or Military Readiness Outcomes Bonus	1,214,000
School Safety Allotment	199,464
99-Total Transportation Allotment	960,832
Other	186,929
Total Cost of Tier I	\$ 173,443,338
Less: Local Fund Assignment (based on current year values)	\$ 200,000,000
State Share of Tier I	\$ (26,556,662)

- Tier II Funding (Golden Pennies)

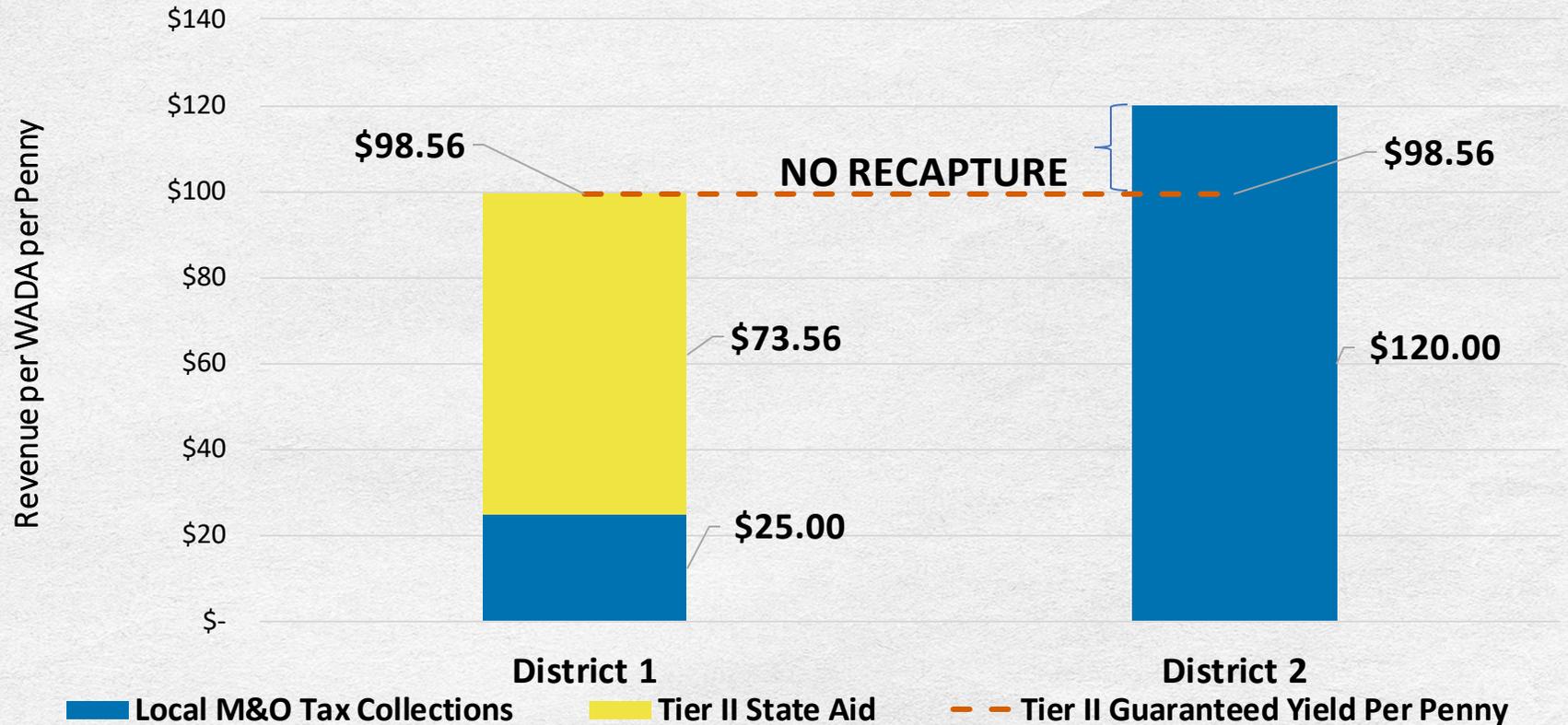
- Additional funding to ensure districts with lower property values are able to generate revenue similar to higher property wealth districts.
 - (Revenue generated per penny, per WADA)

Eights Golden Pennies are equalized to wealth level of \$98.56



Tier II Equalizing Example

Reflects revenue generated per penny of tax, per WADA



Golden Pennies equalized up to \$98.56 per penny of tax effort per WADA.

No recapture of M&O tax collections from districts with higher wealth per WADA.



Birdville ISD 2021–22 Tier II Funding

Birdville ISD 2021–22 Tax Revenue Per Penny	\$ 1,219,353
2021–22 Projected WADA	27,985
Birdville ISD Tax Revenue Per Penny, Per WADA	\$ 43.57
2021–22 Guaranteed Yield on Tier II Pennies	\$ 98.56
Difference	\$ 54.99
Birdville ISD Tier II Revenue for Golden Pennies	\$ 7,528,315



“HOW DO WE PAY FOR BISD?”

OPERATING BUDGET

MAINTENANCE & OPERATIONS (M & O)

EXAMPLES

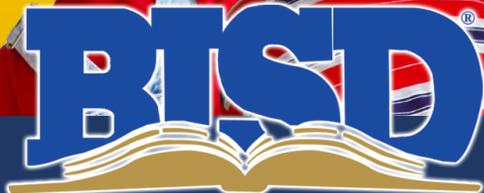
- TEACHER SALARIES
- ELECTRIC BILLS
- MINOR REPAIRS
- BUS GASOLINE

“MORTGAGE”/DEBT

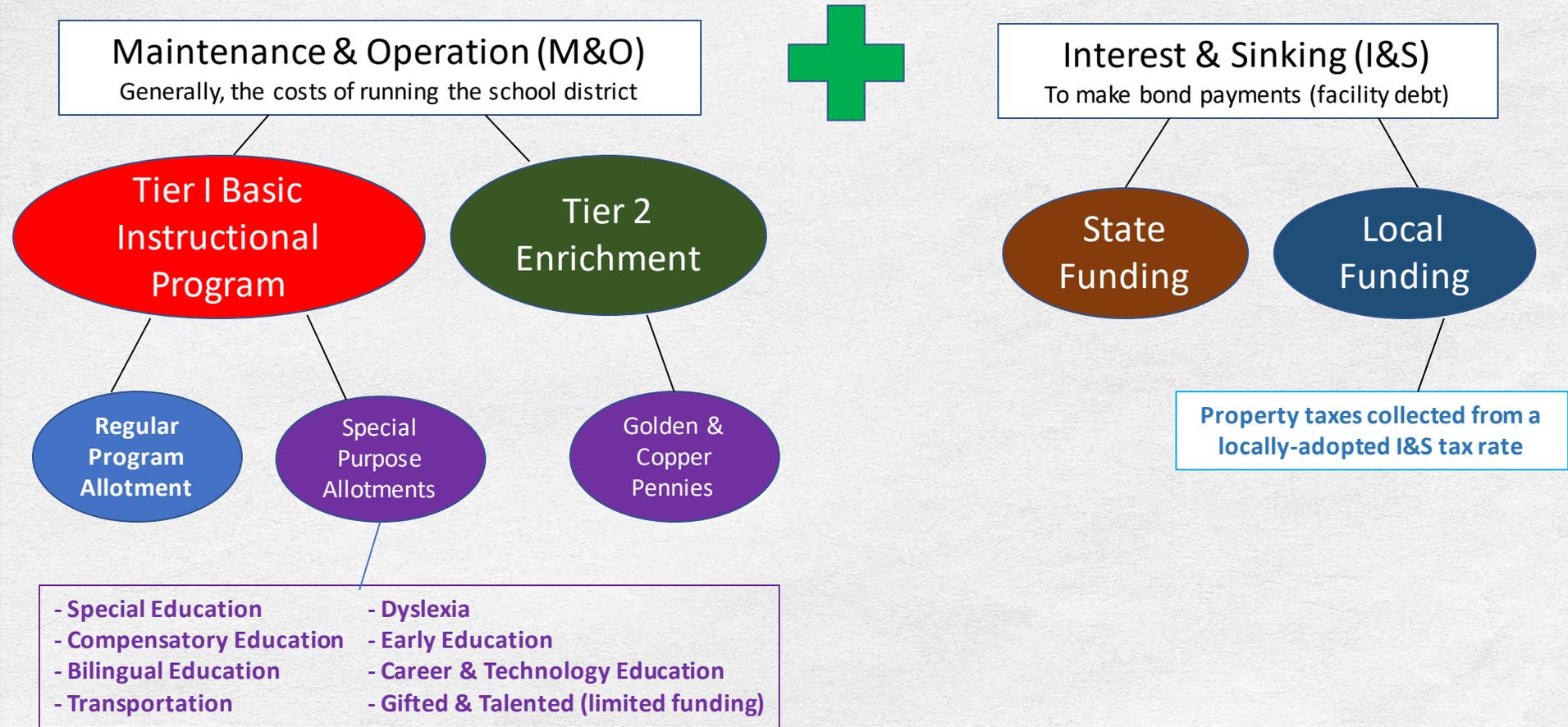
INTEREST & SINKING (I & S)

EXAMPLES

- NEW ELEMENTARY SCHOOL
- SCIENCE WING ADDITION
- NEW SCHOOL BUSES
- LAND PURCHASE



State Funding (w/ Special Education)



I&S Tax Rate History



Birdville ISD Tax Rate History



Taxpayer Savings

- Over the last 10 years, bond refinancing and advanced payments have saved Birdville ISD taxpayers over \$32.6 million in interest costs.

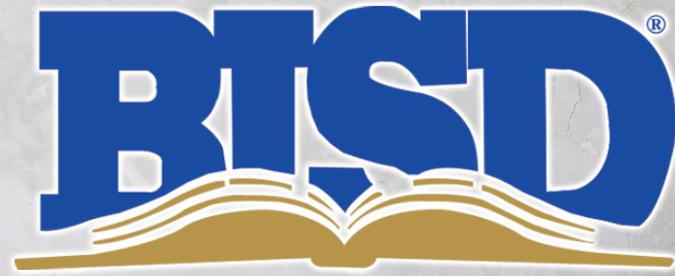


New Legislation

- Bond Ballot Requirements – Senate Bill 30
 - Separate ballot propositions are required for the following:
 - Stadium with capacity exceeding 1,000
 - Natatorium
 - Recreational facility other than a gymnasium, playground or play area
 - Performing arts facility
 - Teacher housing
 - Technology equipment except security equipment or infrastructure
- Bond Ballot Language Requirement – House Bill 3
 - The ballot must include the following statement:
 - “THIS IS A PROPERTY TAX INCREASE”
 - Regardless of the impact on the I&S tax rate



Questions or Comments, & Feedback



Likes and Wishes

- Review at the close of each meeting ...
- What did you **LIKE**?
- What do you **WISH**?
- Any questions?



Meeting 2 Information

- Monday, February 21
- Campus Visits
 - Meet at the Plaza at 6 p.m. for Dinner
 - Buses leave at 6:30 p.m.
 - Cheney Hills Elementary
 - Shannon High School
 - David E. Smith Elementary
 - Mullendore Elementary
 - Online Resources: birdvilleschools.net/bpc2022



Birdville ISD 2022 Bond Planning Committee

February 7, 2022

- Meeting's Structure
- Process Tools
- History of Birdville ISD Bond Referendums
- Public School Finance 101

