

Financial Planning for Negotiations



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Introductions

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Strategies

1. Trust
2. Committees
3. Understanding the Negotiation Process
4. Comparables
5. Projections
6. Role / Team Dynamic



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Trust

1. All starts with TRUST
2. Should be your first priority in preparations - 2 years ahead!
3. How do you build it? Sharing info, over golf/drinks?
4. What it means?



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Committees

1. Glenview 34 and CUSD 201 has a committee structure to allow for bargaining in between bargaining
2. Use to vet ideas and plant seeds
3. Your not leading if no one is following you - build momentum!



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Negotiating Process

1. Traditional or IBB?
2. When do you share your financials? How?
3. Share data files? Trust



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Comparables

1. What is a comp district?
2. Matrix to establish comps, bargained??
3. Why are they good? Not so good?
4. Which districts should I reach out to?

Interest/Metric		Tolerance
Type of Student Body		
Ethnicity	White	+/- 5 %
	Hispanic	+/- 5 %
	Asian	+/- 5 %
	Other	+/- 5 %
% Low Income		+/- 5 %
% IEP		+/- 5 %
Subtotal Student Demo		
District Type		
K-8		Yes
Regional area/contiguous	miles from D34	w/in 10 mi
Student Enrollment		+/- 20 %
# of Certified Staff		+/- 20 %
Subtotal District Type		
Quality of Instruction		
Student to Staff Ratio		+/- 2
Student to Admin Ratio		
PARCC ELA - % Proficient		+/- 5 %
PARCC Math - % Proficient		+/- 5 %
Quality of Instruction		
Community Resources		
Financial Profile Score	Recognition	Yes
Fund Balance % to Expenditures		+/- 10%
2016 Tax Rate		0.02-0.29
EAV per pupil		+/- \$100k
Operating Expense PP		+/- \$1,000
Instructional Expense PP		+/- \$1,000
Community Resources		
Comparability Score		
Data Sources: Illinois School Report Card and District An		
Note: Some figures may vary due to rounding **2017 tax da		



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Projections

1. Glenview does them with a Finance Committee incl. Union Pres
2. CUSD 201 has monthly Finance Committee meetings that analyze projections
3. Assumptions are a first step toward understanding how compensation will affect the future financial trajectory
4. Use as a tool with your Board
5. Use as a tool in actual bargaining sessions



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Your Role on the Team

1. Are you the bad cop? good cop?
2. Are you expected to share info ahead of time?
3. Is this up for discussion?



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Questions and Answers

We thank you for your time!



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