

The Board Whisperer:

Presentation Tips That Resonate with Your Board

Objectives



Identify strategies to improve presentations to your board (BONUS: they also work for other audiences!)



Discuss pitfalls to avoid



Take away two ideas you can implement immediately



Have some fun!



Volunteers Needed!

- 5 power-hungry people who like the spotlight
- 1 really tired person
- 1 person who is good at math



Who is Your Audience?

- The 5 board members
- Consider their backgrounds, interests
- Remember these are public meetings
(You Tube, newspaper)

2025-26 Tax Levy

What is the impact of the proposed tax rate on residents?

	<i>2024-25</i>	<i>2025-26</i>	<i>ANNUAL \$ Change</i>
Property Value – Real Property	\$100,000	\$100,000	\$-
Tax Rate – Real Property	0.714	0.714	-
Property Tax (Increase/Decrease)	\$714	\$714	\$-
Property Value – Personal	\$10,000	\$10,000	\$-
Tax Rate – Personal Property	0.714	0.714	-
Property Tax (Increase/Decrease)	\$71	\$71	\$-



Financial Highlights – General Fund

- Revenues exceeded expenditures by \$5 million
- Causing the unassigned fund balance to increase
- Property tax revenues were budgeted with 99% accuracy
- Committed fund balance is \$1.8 million
 - This is committed for future construction
 - No change from last year



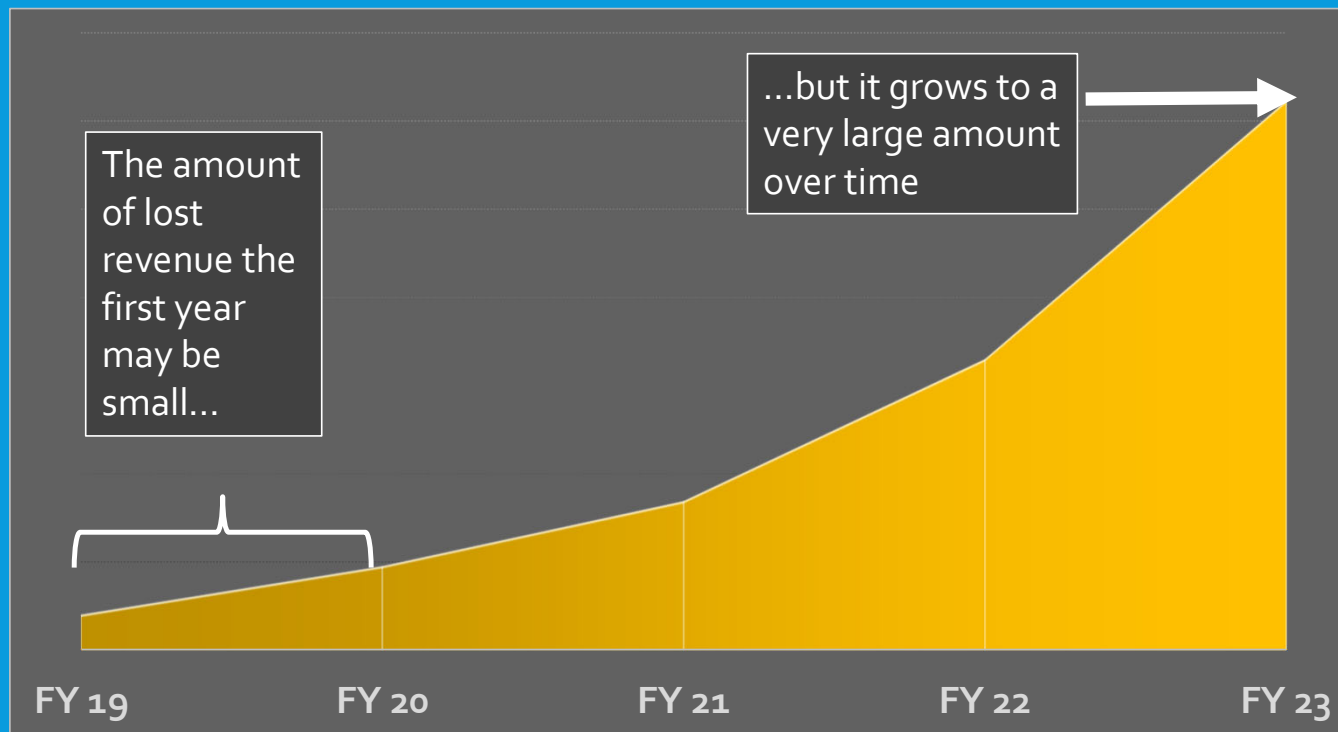
What is Your Point?

- Determine the information you need to convey
 - Inform vs. persuade
- Provide enough information for them to make a decision
- Avoid extra details that lead down a rabbit hole
- Anticipate questions
 - Hidden slides

Maintenance budget must be increased



TAX REVENUES



Projected Enrollment

Projected Enrollment 2018-19	Projected Enrollment 2019-20	Increase (Decrease)	Certified Teacher Allocation Increase (Decrease)
6787	6715	(72)	(3.2)

Staffing

HIDDEN SLIDE!

- Planned retirements of 5
- Will offset staffing reduction of 3.2



To View a Hidden Slide During the Presentation

- Right-click the screen and choose “See all Slides”
- All slides are shown with hidden slides grayed out
- Click the hidden slide you want
- When finished, use same procedure or choose “Last Viewed” to go back to where you were

How do we
explain
enough...

Without
too much?



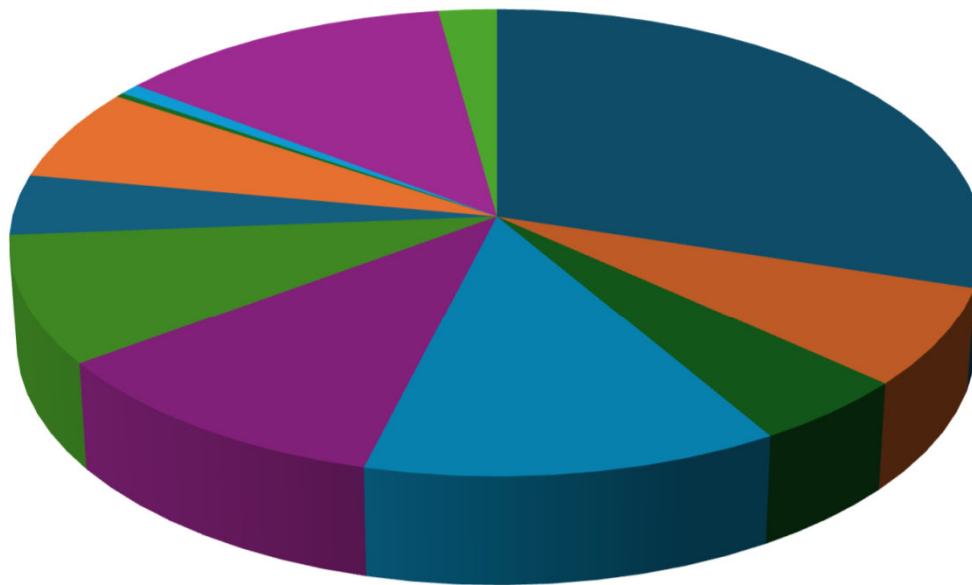
What do I Include?

- You probably only need 25% of the numbers
- Spreadsheets don't belong on slides
- How can you best show the numbers?
 - Graph, photo, words

1,315,634

Expenditures

DON'T!



Salaries

Benefits

Purchased services

Utilities

Professional
development

Textbooks

Supplies

Equipment

Fees

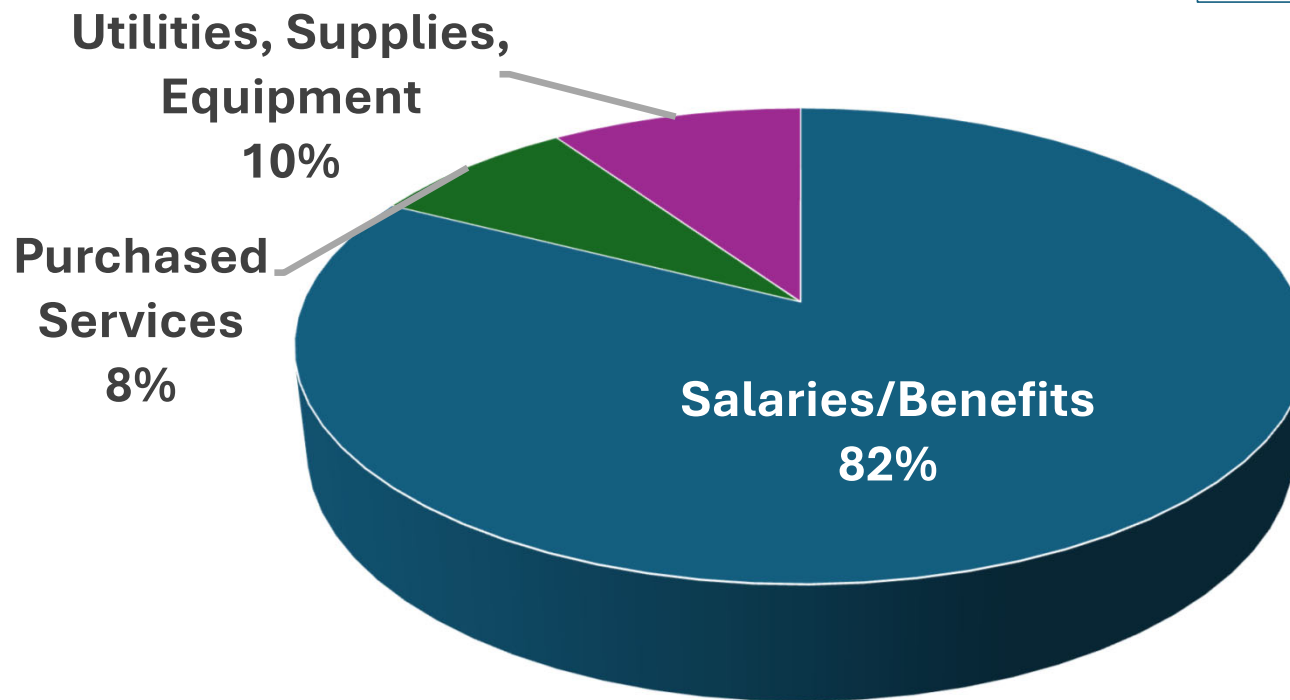
Indirect costs

Principal

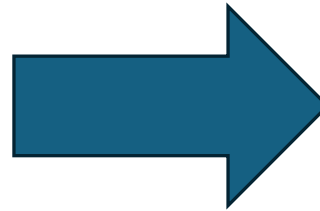
Interest

EXPENDITURES – General Fund

DO!

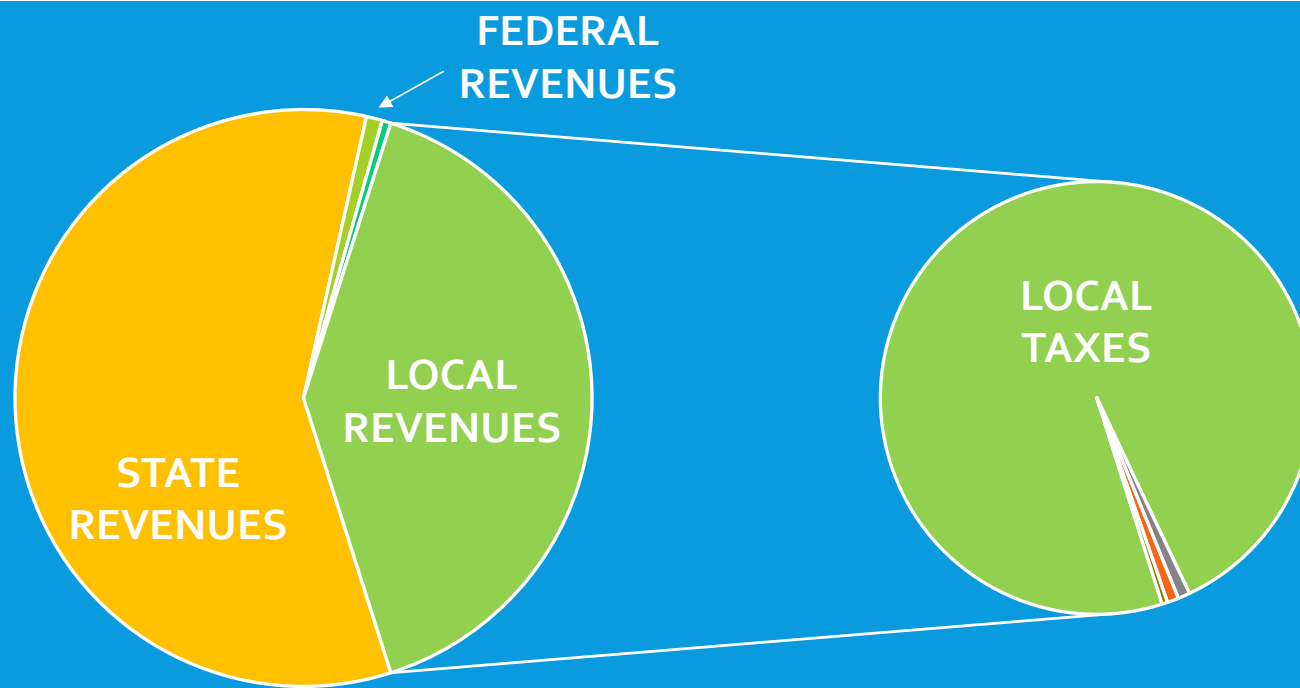


CERTIFIED						
Step Increases 2023-24 Year						
Years of Experience						
	Rank I		Rank II		Rank III	
	EdD/PhD	BA+60	BA+30	BA+Cert		
	Step 2	Step 1	Step 1	Step 1		
0	0	0	0	0		
1	1,221	1,222	1,130	416		
2	321	321	324	417		
3	336	337	325	416		
4	3,594	3,593	3,491	3,357		
5	333	333	326	321		
6	335	335	324	321		
7	335	335	323	325		
8	331	332	332	326		
9	334	333	339	326		
10	5,623	5,624	5,594	5,434		
11	330	330	343	334		
12	337	336	328	329		
13	114	114	111	118		
14	109	109	112	111		
15	1,650	1,650	1,650	1,636		
16	112	112	111	112		
17	109	110	108	108		
18	115	115	115	114		
19	109	109	111	110		
20	3,352	3,353	3,351	3,361		
21	856	853	852	857		
22	144	147	144	140		
23	142	141	141	142		
24	141	141	142	149		
25	947	946	948	943		
26	1,372	1,371	1,371	1,375		
27	1,330	1,333	1,333	1,329		
28	1,294	1,292	1,292	1,293		
29	391	366	397	675		
30	562	612	525	627		



CERTIFIED						
Step Increases - PROPOSED for the 2024-25 Year						
Experience	Step 2	Step 1	Step 1	Step 1		
0	-	-	-	-		
1	1,423	1,423		1,371		1,216
2	1,423	1,423		1,371		1,216
3	1,423	1,423		1,371		1,216
4	1,423	1,423		1,371		1,216
5	1,268	1,268		1,268		1,268
6	1,268	1,268		1,268		1,268
7	1,268	1,268		1,268		1,268
8	1,268	1,268		1,268		1,268
9	1,268	1,268		1,268		1,268
10	1,268	1,268		1,268		1,268
11	673	673		673		673
12	673	673		673		673
13	673	673		673		673
14	673	673		673		673
15	673	673		673		673
16	673	673		673		673
17	673	673		673		673
18	673	673		673		673
19	673	673		673		673
20	673	673		673		673
21	673	673		673		673
22	673	673		673		673
23	673	673		673		673
24	673	673		673		673
25	673	673		673		673
26	673	673		673		673
27	1,087	1,087		1,087		1,087
28	1,087	1,087		1,087		1,087
29	1,087	1,087		1,087		1,087
30	1,087	1,087		1,087		1,087
31	1,087	1,087		1,087		1,087
32	1,087	1,087		1,087		1,087
33	1,087	1,087		1,087		1,087
34	1,087	1,087		1,087		1,087
35	1,087	1,087		1,087		1,087
36	1,087	1,087		1,087		1,087
37	1,087	1,087		1,087		1,087
38	1,087	1,087		1,087		1,087
39	1,087	1,087		1,087		1,087
40	1,087	1,087		1,087		1,087

REVENUES



Shelby County Public Schools



TENTATIVE BUDGET REPORT FOR FY 2026

GENERAL FUND (1)	LAST FY ACTUALS	CY BUDGET APPROP	NY BUDGET APPROP
EXPENDITURES			
0000 RESTRICT TO REV & BAL SHT ONLY			
0200 EMPLOYEE BENEFITS	.00	.00	.00
TOTAL 0000 RESTRICT TO REV & BAL SHT	.00	.00	.00
1000 INSTRUCTION			
0100 SALARIES PERSONNEL SERVICES	25,884,813.90	29,978,748.50	31,295,429.69
0200 EMPLOYEE BENEFITS	1,804,386.89	1,908,396.03	1,974,528.49
0280 ON-BEHALF	13,678,117.00	17,225,000.00	17,225,000.00
0300 PURCHASED PROF AND TECH SERV	153,303.92	465,142.81	455,000.00
0400 PURCHASED PROPERTY SERVICES	229,518.27	127,608.67	81,900.00
0500 OTHER PURCHASED SERVICES	403,610.00	395,747.12	378,163.25
0600 SUPPLIES	18,327.00	1,113,265.48	1,601,990.39
0700 PROPERTY	.00	45,000.00	.00
0800 DEBT SERVICE AND MISCELLANEOUS	.00	78,924.73	65,000.00
0840 CONTINGENCY	.00	.00	.00
0900 OTHER ITEMS	.00	.00	.00
TOTAL 1000 INSTRUCTION	43,888,224.00	51,337,833.34	53,077,011.82
2100 STUDENT SUPPORT SERVICES			
0100 SALARIES PERSONNEL SERVICES	3,365,674.23	3,365,674.23	3,709,154.88
0200 EMPLOYEE BENEFITS	383,130.48	383,130.48	400,890.05
0280 ON-BEHALF	1,400,000.00	1,400,000.00	1,400,000.00
0300 PURCHASED PROF AND TECH SERV	145,577.61	145,577.61	102,300.00
0400 PURCHASED PROPERTY SERVICES	1,550.00	1,550.00	1,550.00
0500 OTHER PURCHASED SERVICES	124,988.82	124,988.82	125,162.00
0600 SUPPLIES	17,000.90	17,000.90	23,275.00
0700 PROPERTY	.00	.00	.00
0800 DEBT SERVICE AND MISCELLANEOUS	8,248.00	8,248.00	.00
TOTAL 2100 STUDENT SUPPORT SERVICES	5,446,170.04	5,446,170.04	5,762,331.93
2200 INSTRUCTIONAL STAFF SUPP SERV			
0100 SALARIES PERSONNEL SERVICES	3,096,681.08	3,096,681.08	3,096,681.08
0200 EMPLOYEE BENEFITS	298,633.24	298,633.24	298,633.24
0280 ON-BEHALF	1,800,000.00	1,800,000.00	1,800,000.00
0300 PURCHASED PROF AND TECH SERV	94,735.00	94,735.00	222,600.00
0400 PURCHASED PROPERTY SERVICES	56,382.81	56,382.81	55,000.00
0500 OTHER PURCHASED SERVICES	527,580.61	527,580.61	455,282.20
0600 SUPPLIES	137,849.33	137,849.33	77,000.00
0700 PROPERTY	.00	.00	.00
0800 DEBT SERVICE AND MISCELLANEOUS	1,650.00	1,650.00	1,150.00
0900 OTHER ITEMS	.00	.00	.00
TOTAL 2200 INSTRUCTIONAL STAFF SUPP SERV	6,085,782.22	6,085,782.22	6,006,346.52

How do I Make Slides Easy to Read?

- High contrast
- Large, boring font
- Few or no animations
- Don't overdo the graphics
- Limit the information on each slide



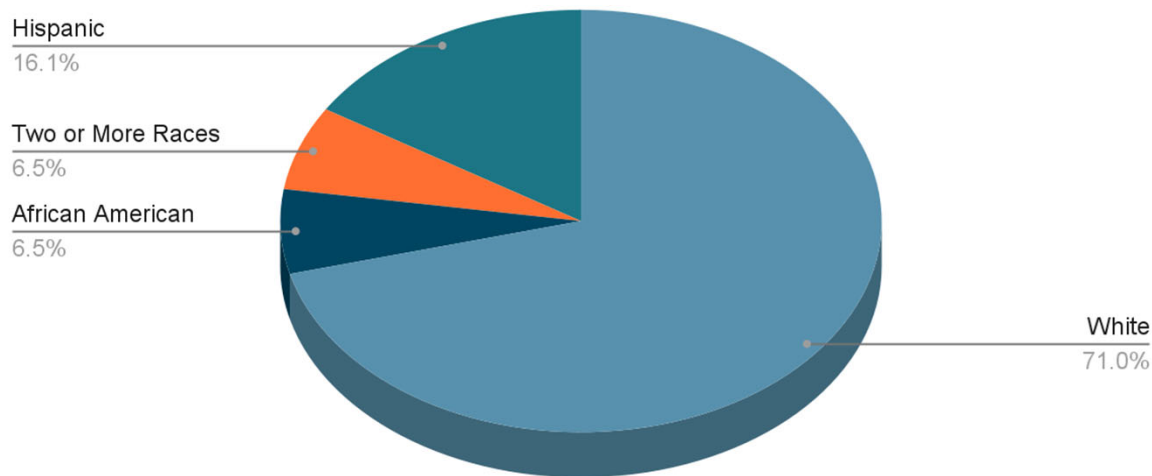
How Do I Keep them Engaged?

- Use language they understand
- Images and words instead of numbers where possible
- Analogies
- Simple graphs and charts
- Speak to their concerns

What can be improved on this slide?

Geometry: 32 Students

Student Enrollment by Race



Percentage of Free/Reduced Lunch:

- 34.3%

Percentage of EL Students:

- 6.2%

Number of ECE Students:

- 0

Number of TAG Students

- 9

GETTING SEEK FUNDING BACK ON TRACK THE CALCULATIONS

"Back on Track"
is getting
SEEK
funding back on
Track. K-12
funding to
inflation
erosion.

These reports are based on the change in the Consumer Price Index from 2008 to 2018 and solely focus on Kentucky SEEK funding formula during the most recent 15-year period.

County Schools

SEEK BASE

	CURRENT	BACK ON TRACK \$5,400 BASE	ADDITIONAL FUNDING REQUIRED
BASE GUARANTEE TOTAL	\$49,344,623	\$64,990,479	15,645,856
STUDENTS	12,035	12,035	N/A
BASE GUARANTEE PER STUDENT	\$4,100	\$5,400	\$1,300

SEEK ADD-ONS FOR STUDENT NEEDS

	CURRENT	BACK ON TRACK \$5,400 BASE	ADDITIONAL FUNDING REQUIRED
ADD-ON FOR AT-RISK STUDENTS (15% OF BASE)	\$3,514,872	\$4,629,344	\$1,114,472
ADD-ON FOR EXCEPTIONAL STUDENTS (235%, 117% OR 24% OF BASE)	\$8,058,919	\$10,614,186	\$2,555,267
ADD-ON FOR HOME AND HOSPITAL STUDENTS (BASE MINUS \$100)	\$39,480	\$52,311	\$12,831
ADD-ON FOR STUDENTS WITH LIMITED ENGLISH PROFICIENCY (9.6% OF BASE)	\$78,720	\$103,680	\$24,960
ADD-ON TOTAL	\$11,691,991	\$15,399,521	3,707,530
STUDENTS	12,035	12,035	N/A
ADD-ONS PER STUDENT	\$971	\$1,280	\$309

SEEK TRANSPORTATION

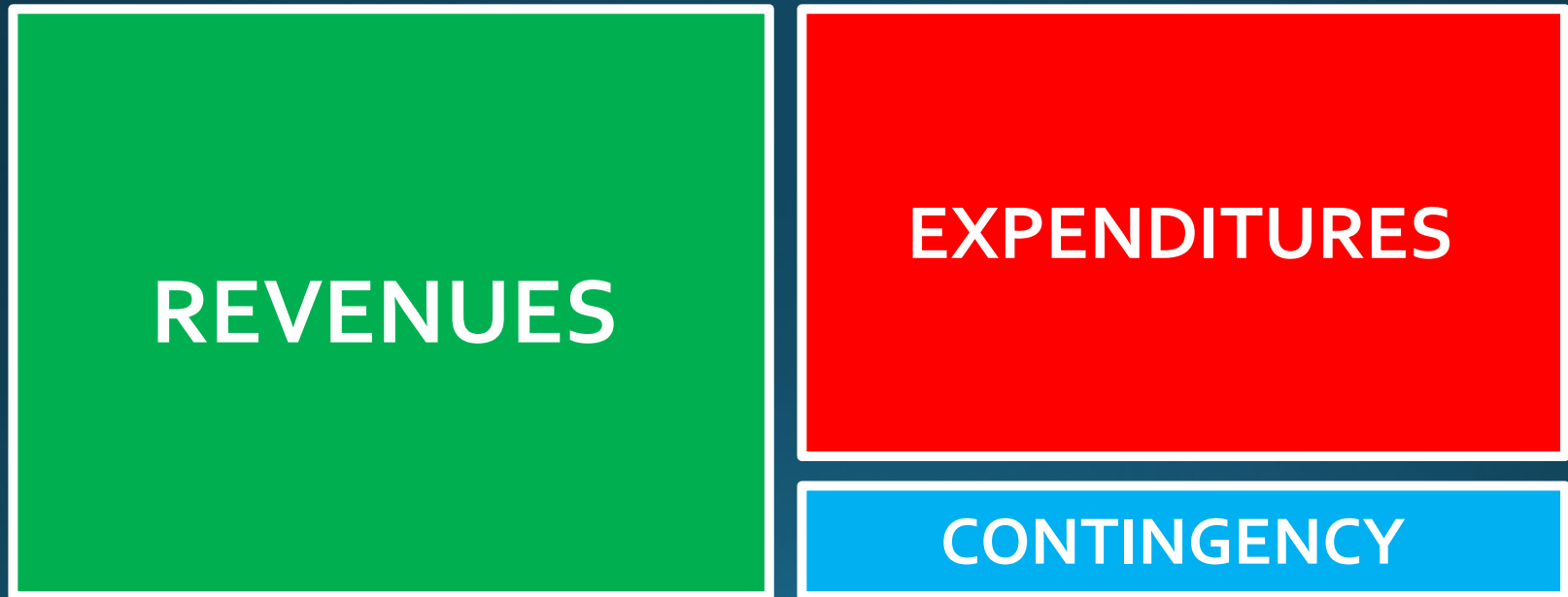
	CURRENT	BACK ON TRACK \$5,400 BASE	ADDITIONAL FUNDING REQUIRED
SEEK TRANSPORTATION	\$5,158,775	\$7,492,933	2,334,158.00
STUDENTS	12,035.27	12,035	N/A
SEEK TRANSPORTATION PER STUDENT	\$429	\$623	\$194

Districts qualify for SEEK Base, Add-ons, and Transportation by gathering local tax revenue equal to 30¢ for every \$100 in assessed property value. Residents in this school district are already contributing that local share. It's time to get the state share back on track.

PER 1 ADDED EQUALIZATION

	CURRENT	BACK ON TRACK \$5,400 BASE	ADDITIONAL FUNDING REQUIRED
MAXIMUM	\$10,279,432	\$13,182,440	N/A
SHARE OF MAXIMUM	\$8,186,821	\$10,498,855	N/A
STATE SHARE OF MAXIMUM	\$2,092,612	\$2,683,585	590,973
STUDENTS	12,035	12,035	N/A
STATE SHARE OF MAXIMUM PER STUDENT	\$174	\$223	\$49

Budget equation



General Fund Revenues

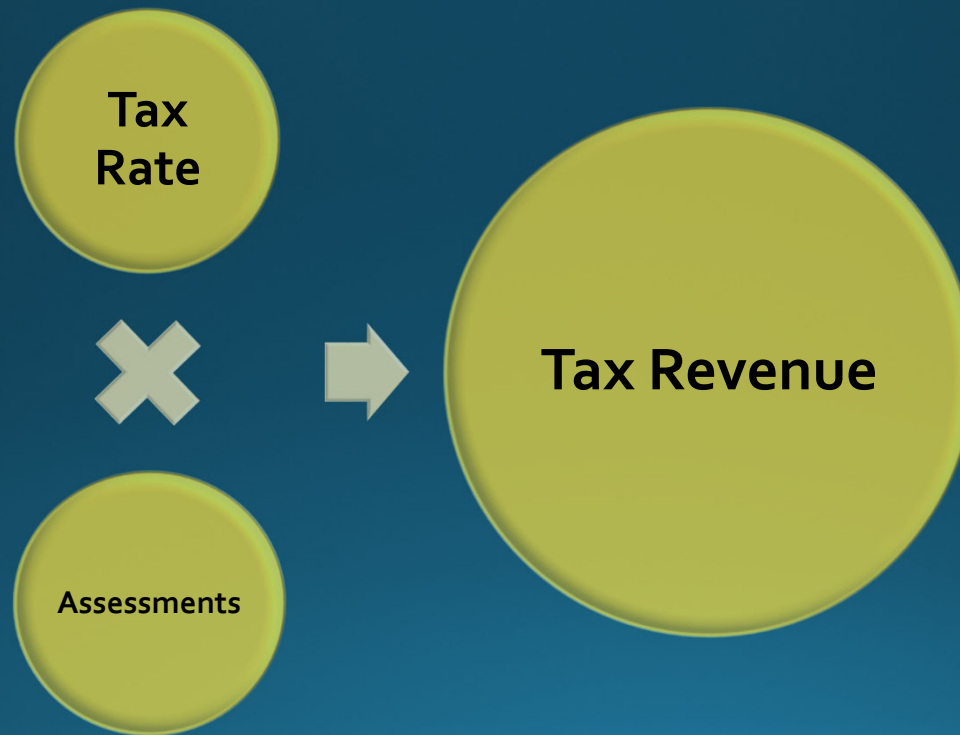
Estimated tax revenues increased by \$170,362

However, SEEK revenues decreased by \$115,476

Net increase: \$54,886



Property Tax Revenues

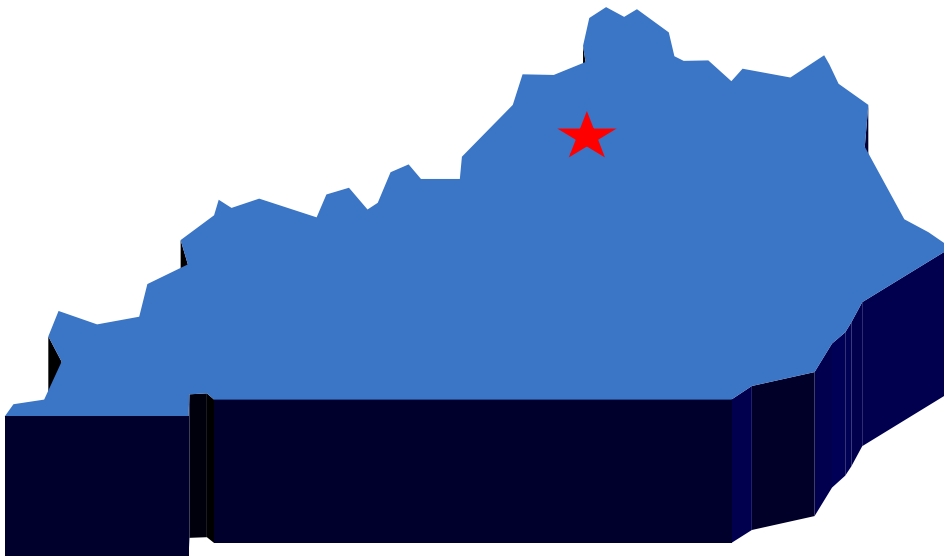


- Undefined or too many acronyms
- Unintentional color meanings or symbols
- Unreadable slides
- Apologizing
- Put a spreadsheet on a slide
- Technical jargon
- Text-heavy slides
- Using the wrong graph type
- Data unrelated to your message

Pitfalls to
Avoid

Suggestions for Success

- Be prepared; have a back-up plan in case the technology does not work
- Less is usually more
- It's ok to say "I don't know, I'll get that answer for you"
- Stay focused on your purpose
- Be confident



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