

BELMONT PUBLIC SCHOOLS FY18 “DRAFT 2” BUDGET PRESENTATION

School Committee

February 13, 2017

FY18 Budget Process

1. **Using FY17 to Inform FY18**
 1. Highlight and Changes from FY17 to FY18
2. **Recognition of Enrollment, Class Size and Space Issues**
3. **FY18 Budget Planning**
 1. Three Year Budget Plan; Zero-based budgeting process utilized
 2. Using the Belmont Public Schools Strategic Plan to guide budgeting process

Using FY17 to Inform FY18

1. Using FY17 to Inform FY18 – Per Pupil Spending

- Review of per pupil spending report by the Department of Elementary and Secondary Education (DESE) from FY11-FY15 (the most recent year available)
- Cohort districts include:
 - Comparable districts
 - Level 1 districts
 - Neighboring communities
- Listing of districts:

Acton Boxboro
Acton-Boxborough
Arlington
Bedford
BELMONT
Brookline
Burlington

Cambridge
Concord
Concord Carlisle
Dover
Dover-Sherborn
Lexington
Marblehead

Milton
Newton
Sharon
Sherborn
Sudbury
Waltham
Watertown

Wayland
Wellesley
Westborough
Westford
Weston
Westwood
Winchester

1. Using FY17 to Inform FY18 – Per Pupil Spending

Findings

- Belmont has consistently spent less on a per pupil basis than the state average, and the average of cohort districts
- Belmont ranks 25th or 26th in per pupil spending among 28 cohort districts from FY11-FY15

PER PUPIL SPENDING: BELMONT VS STATE AVERAGE AND COHORT DISTRICTS FY11-FY15 (1 of 3)

	DISTRICT	COMPARABLE TO BELMONT	LEVEL 1 2016	BORDERS BELMONT	FY11 \$	FY11 RANK	FY12 \$	FY12 RANK	FY13 \$	FY13 RANK	FY14 \$	FY14 RANK	FY15 \$	FY15 RANK
1	Cambridge			X	26,305	1	27,018	1	27,474	1	27,163	1	27,569	1
2	Concord Carlisle	X			20,066	2	20,525	2	20,751	2	20,446	4	20,760	4
3	Waltham			X	19,741	3	18,899	4	18,866	6	19,502	5	19,940	6
4	Weston	X			19,352	4	19,915	3	20,579	3	21,653	2	22,768	3
5	Dover		X		17,607	5	18,313	5	19,323	4	21,336	3	24,263	2
6	Bedford	X			16,963	6	16,600	9	16,993	11	17,226	13	17,839	12
7	Concord	X			16,637	7	16,893	6	16,098	16	16,457	15	17,517	15
8	Brookline	X			16,556	8	16,626	8	16,924	12	17,291	12	17,652	13
9	Lexington	X		X	16,552	9	16,726	7	16,821	13	17,496	10	N/A	N/A
10	Dover-Sherborn		X		16,495	10	16,434	11	17,123	10	17,650	8	18,673	9
11	Newton	X			16,397	11	16,400	12	17,141	9	17,581	9	18,096	11
12	Watertown			X	16,008	12	16,493	10	17,279	7	17,292	11	20,134	5
13	Wellesley	X			15,421	13	15,085	16	17,232	8	17,108	14	18,289	10
14	Wayland	X			15,156	14	15,902	13	16,177	15	16,445	16	17,650	14

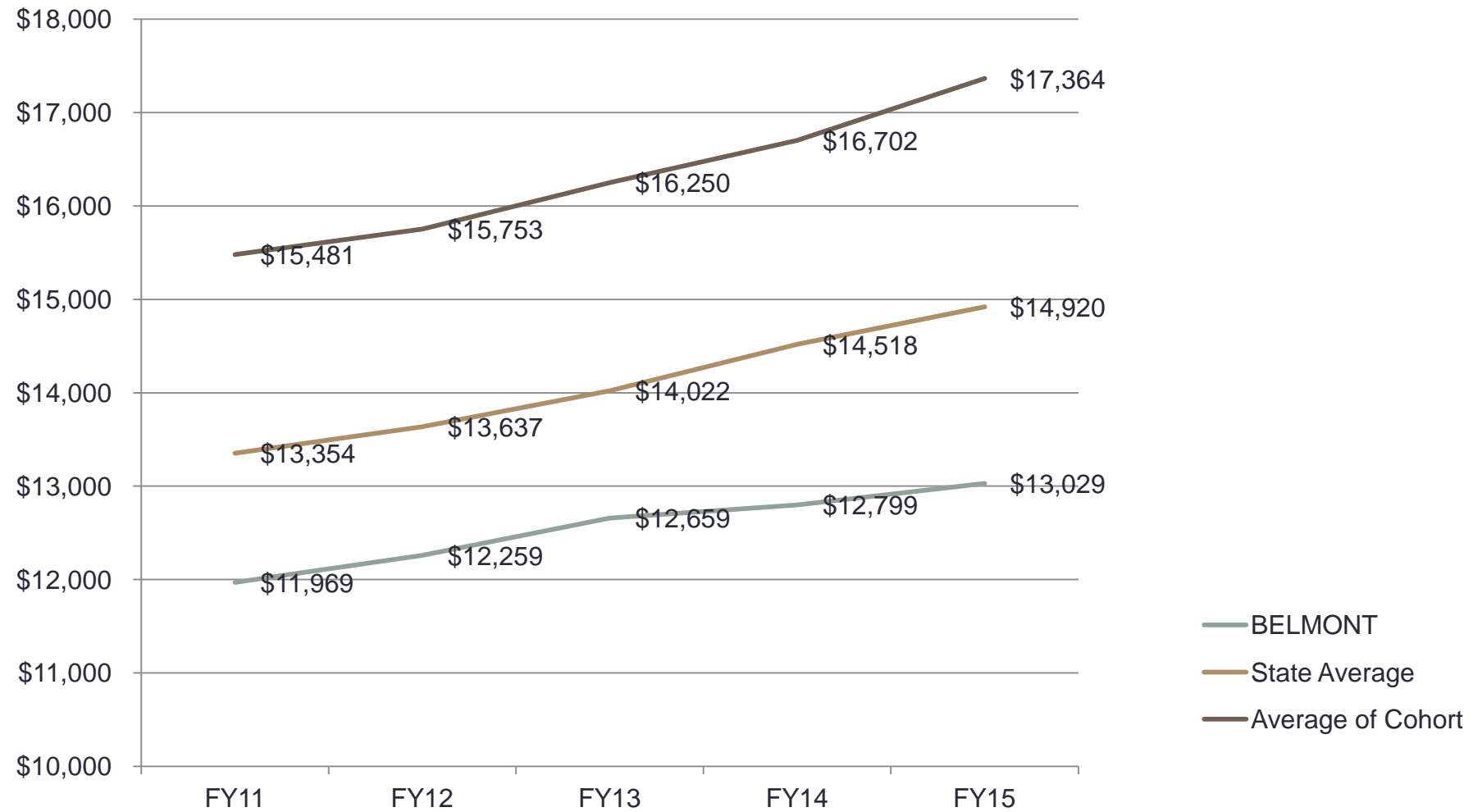
PER PUPIL SPENDING: BELMONT VS STATE AVERAGE AND COHORT DISTRICTS FY11-FY15 (2 of 3)

	DISTRICT	COMPARABLE TO BELMONT	LEVEL 1 2016	BORDERS BELMONT	FY11 \$	FY11 RANK	FY12 \$	FY12 RANK	FY13 \$	FY13 RANK	FY14 \$	FY14 RANK	FY15 \$	FY15 RANK
15	Sherborn		X		15,129	15	15,720	15	19,317	5	18,378	6	19,534	7
16	Burlington	X			15,008	16	15,893	14	16,643	14	17,700	7	19,238	8
17	Sharon		X		14,096	17	14,527	18	14,659	18	15,021	18	15,401	17
18	Westborough		X		14,007	18	14,545	17	14,306	19	14,736	21	14,813	18
19	Westwood		X		13,999	19	14,197	19	14,827	17	15,337	17	15,833	16
20	Acton-Boxborough	X			13,182	20	13,697	20	13,962	20	14,937	19	14,016	21
21	Acton Boxboro	X			13,182	20	13,697	20	13,962	20	14,937	19	14,016	21
22	Arlington	X		X	12,942	22	12,603	25	12,546	26	13,085	25	13,290	24
23	Marblehead	X			12,727	23	12,998	22	12,706	24	13,218	24	13,678	23
24	Milton	X			12,613	24	12,816	24	12,992	23	13,499	23	14,116	20
25	Sudbury	X			12,359	25	12,899	23	13,426	22	14,246	22	14,797	19
26	BELMONT			X	11,969	26	12,259	26	12,659	25	12,799	26	13,029	26
27	Winchester	X			11,822	27	11,954	27	12,380	27	12,579	27	12,801	27
28	Westford	X	X		11,179	28	11,449	28	11,838	28	12,529	28	13,118	25

PER PUPIL SPENDING: BELMONT VS STATE AVERAGE AND COHORT DISTRICTS FY11-FY15 (3 of 3)

DISTRICT				FY11 \$		FY12 \$		FY13 \$		FY14 \$		FY15 \$	
State Average				13,354		13,637		14,022		14,518		14,920	
BELMONT				11,969		12,259		12,659		12,799		13,029	
State Ave vs. BELMONT				1,385		1,378		1,363		1,718		1,891	
% Below State Average				11.6%		11.2%		10.8%		13.4%		14.5%	
Average of Cohort				15,481		15,753		16,250		16,702		17,364	
BELMONT				11,969		12,259		12,659		12,799		13,029	
Cohort Ave vs. BELMONT				3,512		3,494		3,591		3,903		4,336	
% Below Cohort Average				29.3%		28.5%		28.4%		30.5%		33.3%	

PER PUPIL SPENDING: BELMONT VS STATE AVERAGE AND COHORT DISTRICTS FY11-FY15



Data Source: <http://www.doe.mass.edu/finance/statistics/ppx15.html>

Belmont Public School has been high successful with our outputs and outcomes despite low inputs as demonstrated by the per pupil data.

- BPS has High level of community support
 - We benefit by a huge base of parental involvement, volunteering and fundraising – from PTO's, PTA's, Boosters, POMs, Patrons, and of course an incredible partnership with the Foundation for Belmont Education.
 - We benefit by a wonderful Town Department connection with the DPW, Facilities, Park and Rec, Police and Fire – the level of support that is found in our town is extraordinary – David Kale ...
- BPS has great educators and students:
 - Teachers engage our children at high levels of rigor, with social emotional supports, and teacher and student led learning.
 - Academically student outcomes produce state exam scores that put all six schools and the district at Level One – the highest outcome award by the state. We are one of only six K-12 districts that hold this designation.
 - The Butler School was recognized as a **National Blue Ribbon School** – one of three in the state of Massachusetts, the Burbank School was recognized with a Commendation for high achievement – both school were honored at the State House last week.
 - Our students continue to excel across all state measures in Art, Music, athletics, co-curricular teams such as (Quiz Bowl, Model UN etc...) and of course lead in hours put into incredible Community Service efforts across the metro Boston area.
- BPS has a hard working administrative team that continues to use its Strategic Plan to guide our work, budget transparently, and we continue to actively grapple with significant increase in enrollment, demands on mandated services and lack of classroom space.

1. Using FY17 to Inform FY18

- ✓ District benefited enormously by the Spring 2015 Override funds in FY16 and FY17:
 - ✓ 10 FTEs in FY16
 - ✓ 5 FTEs in FY17
 - ✓ Infusion for mandated Student Services costs –Special Education Transportation and Out of District Tuition, and Contracted Services
 - ✓ Principals and directors are now able to expend budgeted funds without any mandated “freezes” – first time in over 6 years
 - ✓ FY16 became a new baseline for expenditures of texts, materials & supplies, professional development, and other operational costs

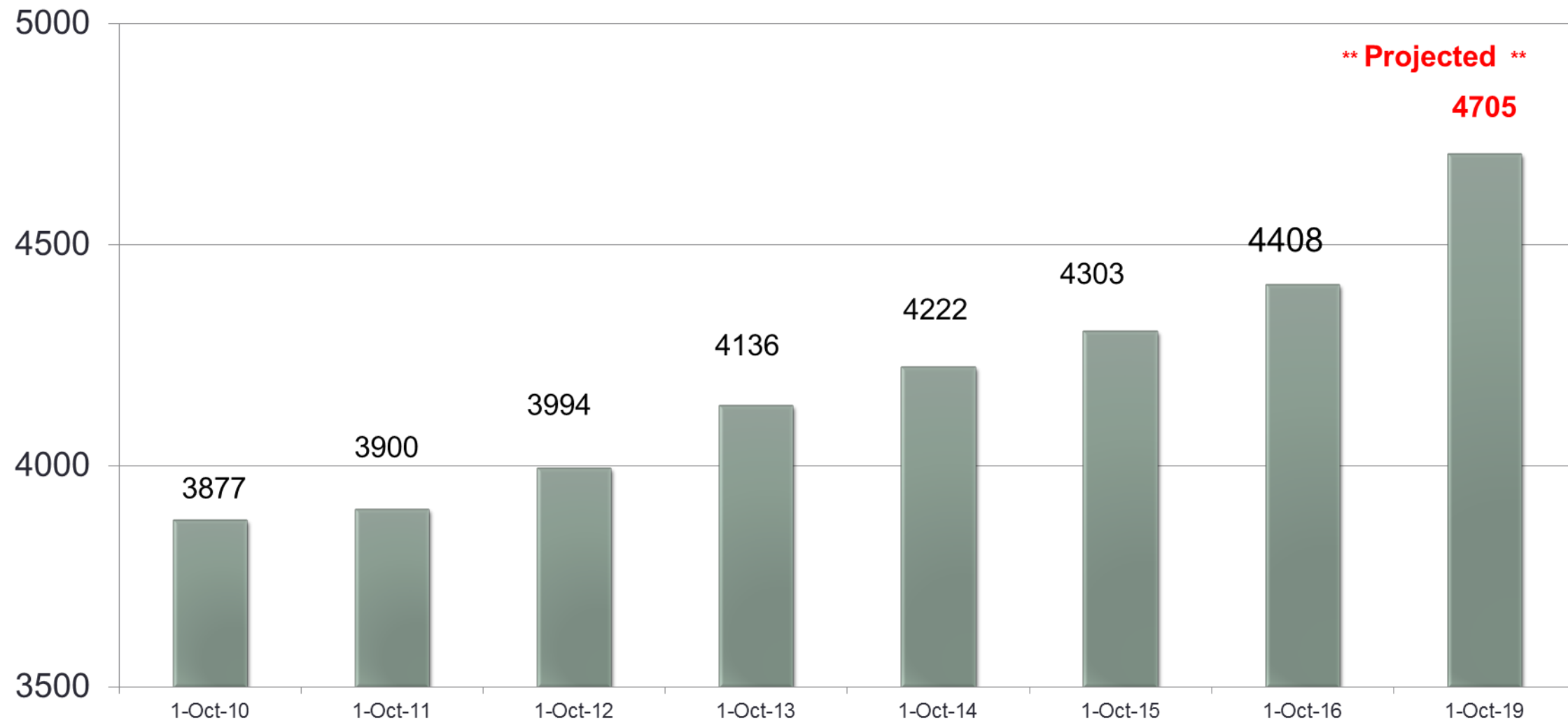
1. Using FY17 to Inform FY18 (cont.)

- ✓2. The FY16 & FY17 budgets has been managed well in the aggregate
- ✓3. FY17 operations are on track to meet existing needs within the budget
- ✓4. Increasing enrollment, class size and space are becoming pressure points during this time period and we are using that information to develop the FY18 Budget

Recognition of Enrollment, Class Size and Space Issues

2. Enrollment, Class Size and Space Issues

BPS K-12 Enrollment
From October 1, 2010 to October 1, 2016



2. Enrollment, Class Size and Space Issues

Enrollment – District Wide

Aggregate Increase over 5 Year Period & Projection over the next 3 Year Period

	Oct. 1, 2011	Oct. 1, 2012	Oct. 1, 2013	Oct. 1, 2014	Oct. 1, 2015	Oct. 1 2016		Oct. 1, 2019
BPS K-12 Enrollment	3900	3994	4136	4222	4303	4408		**4705
		94	142	86	81	105		
			<i>Increase, 2011 to 2016</i>				508	

Given the average five year increase is 101 students per year our current projection of 4705 by 2019 SY is accurate.

2. Enrollment, Class Size and Space Issues

Elementary Class Sizes (10/1/16)

(Guidelines)	16	20	21	22	23	24	25	26	Total	# > Guidelines	% > Guidelines
K (18-22)				1	8	6			15	14	93%
1 (19-23)			3	10	2				15	0	0%
2 (19-23)	1			4	3	7	2		17	9	53%
3 (20-24)				1	2	4	7	1	15	8	53%
4 (20-24)		1		1	5	7	1		15	1	7%
Total	1	1	3	17	20	24	10	1	77	32	42%

2. Enrollment, Class Size and Space Issues

- Our enrollment increases by 100 students per year.
- Our elementary class size is increasing each year and many classes are above School Committee recommended levels.
- The district has provided over 15 additional classroom spaces over the last 2 years.
- 12 modular classrooms are in use at BHS and CMS.
- The need for additional space at the elementary level – including the option for modular space being discussed and researched.

2. Enrollment, Class Size and Space Issues

Five Year Enrollment Projections per Fall 2016 Update from McKibben Associates

<u>Grade</u>	<u>15/16</u>	<u>16/17</u>	<u>17/18</u>	<u>18/19</u>	<u>19/20</u>	<u>20/21</u>	<u>21/22</u>	
K	313	350	346	344	340	338	342	
1	370 (+1)	329	367	363	360	356	353	
2	355	391 (+2)	339	376	372	369	368	
3	341	365	399 (+2)	344	381	377	378	
4	349	350	373	409 (+2)	352	392	389	
5	332	348	347	369	405	348	386	

Average Class Size Chart by total population by grade

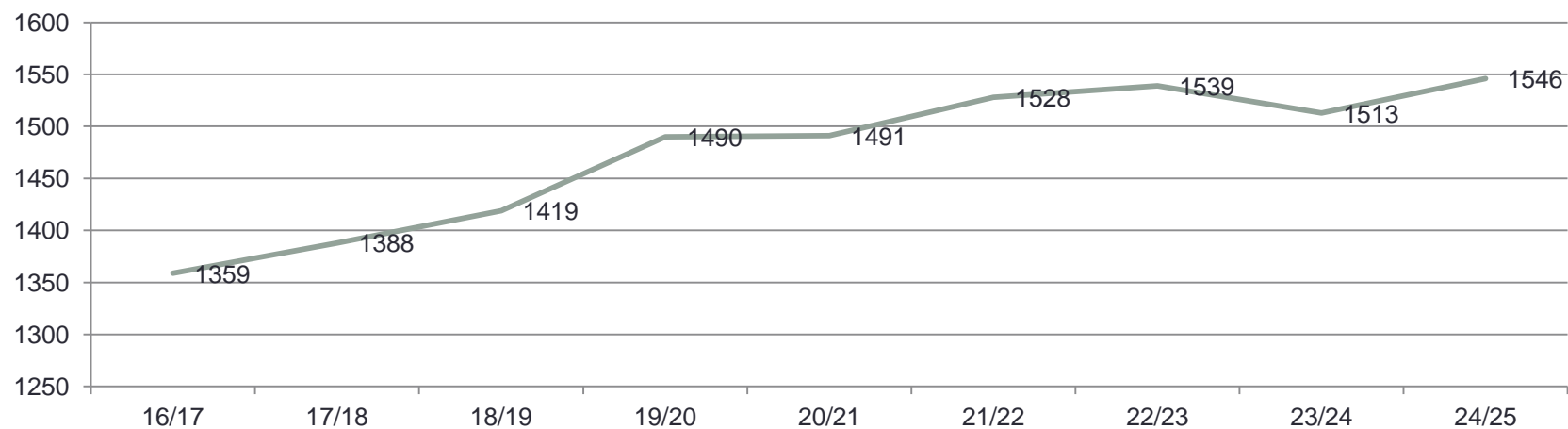
<u>Total K-4</u>	<u>14</u>	<u>15 (Standard)</u>	<u>16 (Plus 1)</u>	<u>17</u>
335	24	<u>22.3</u>	21	20
		-		
350	25	<u>23.3</u>	22	21
		-		
360	26	<u>24</u>	23	21.1
		-		
380	27.1	<u>25.3</u>	24	22.3
		-		
400	29	<u>27</u>	25	24

2. Enrollment, Class Size and Space Issues

Chenery Middle School 9 Year Enrollment Forecast

<u>Year</u>	<u>16/17</u>	<u>17/18</u>	<u>18/19</u>	<u>19/20</u>	<u>20/21</u>	<u>21/22</u>	<u>22/23</u>	<u>23/24</u>	<u>24/25</u>
Enroll	1359	1388	1419	1490	1491	1528	1539	1513	1546
# change	36	29	31	71	1	37	11	-26	33
% change	2.70%	2.10%	2.20%	4.90%	0.10%	2.40%	0.70%	-1.70%	2.10%

**CMS Enrollment Projection
2016/17-2024/25**



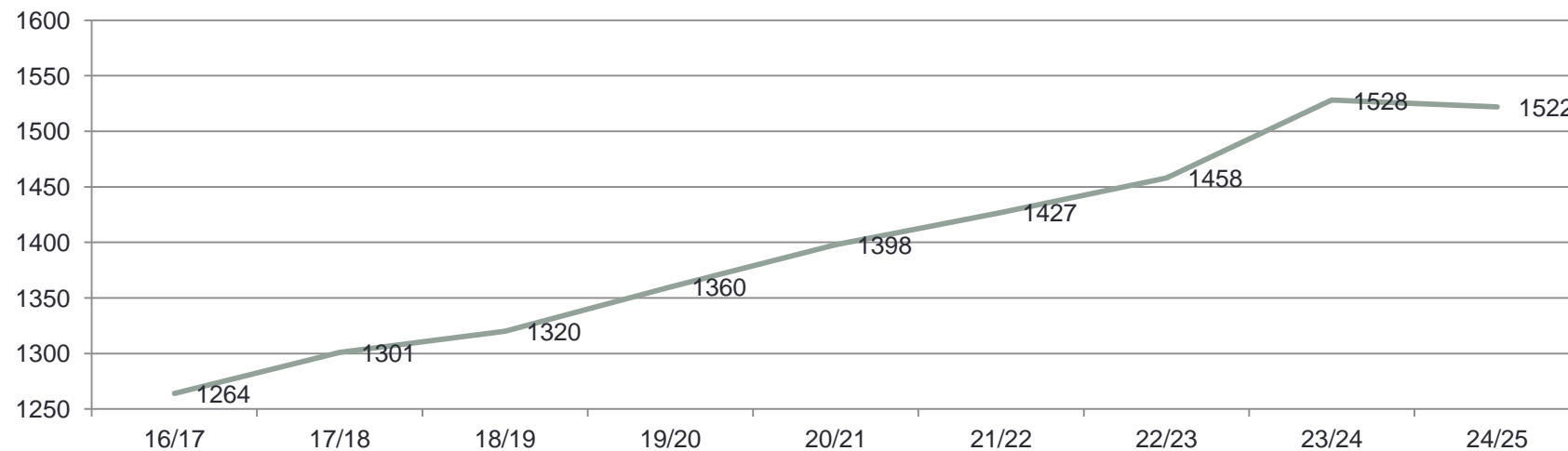
Data Source: McKibben Associates, October, 2016

2. Enrollment, Class Size and Space Issues

Belmont High School 9 Year Enrollment Forecast

<u>Year</u>	<u>16/17</u>	<u>17/18</u>	<u>18/19</u>	<u>19/20</u>	<u>20/21</u>	<u>21/22</u>	<u>22/23</u>	<u>23/24</u>	<u>24/25</u>
Enroll	1264	1301	1320	1360	1398	1427	1458	1528	1522
# change	18	37	19	40	38	29	31	70	-6
% change	1.4%	2.9%	1.4%	3.0%	2.7%	2.0%	2.1%	4.7%	-0.4%

**BHS Enrollment Projection
2016/17-2024/25**



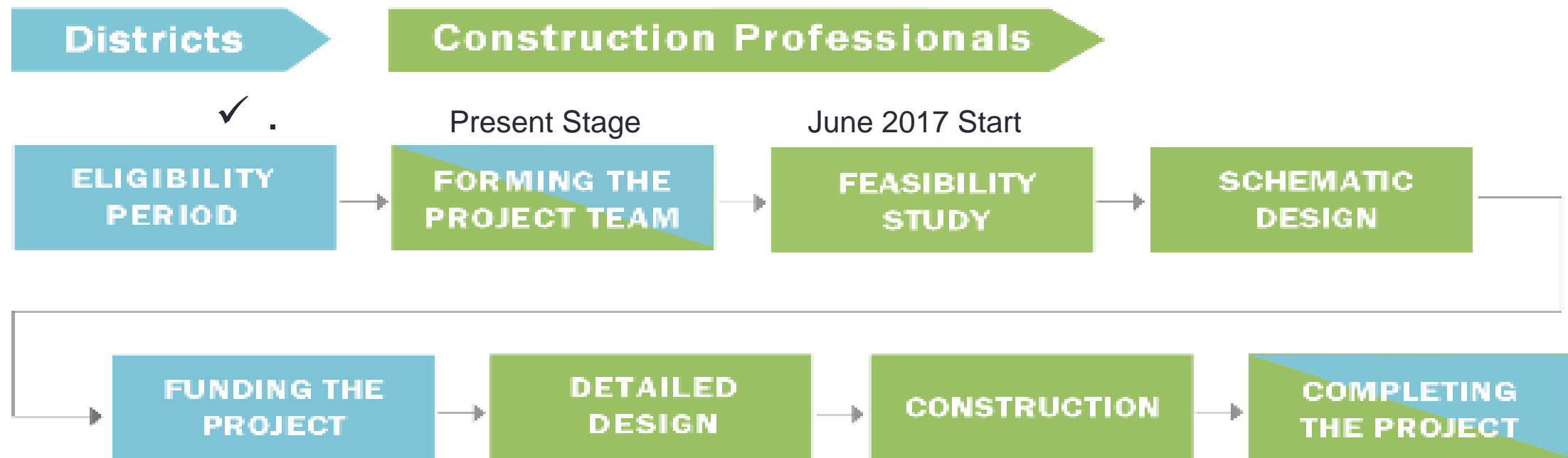
Data Source: McKibben Associates, October, 2016

2. Enrollment, Class Size and Space Issues

MSBA Building Process

MSBA Building Process

Steps primarily for:



2. Enrollment, Class Size and Space Issues Challenges

What is the long range plan?

- The Belmont High School Building Committee (BHS-BC) has three space configuration options as part of the MSBA proposal: (A. 7-12), (B. 8-12), (C. 9-12)
- Each options solves part or all of our space and enrollment needs.
- The Space Task Force is working in tandem with the BHS-BC to provide flexible space options for the elementary school level.

2. Enrollment, Class Size and Space Issues

BHS – BC/ MSBA: Grade Configurations

MSBA Configuration Options	Elementary	Middle School	Notes
<u>9-12</u> *	<input type="checkbox"/> K-4	<input type="checkbox"/> 5-8	MS and Elementary enrollment / space issues not addressed.
<u>8-12</u> * 8/9...10-12 8... 9-12	<input type="checkbox"/> K-4	✓ 5-7	HS and MS levels would have space – Elementary level issues not addressed.
<u>7-12</u> * 7/8...9-12	✓ K-3	✓ 4-6	All levels would be provided space to accommodate increased enrollment.
* MSBA / BHS-BC	<input type="checkbox"/> Space Issues Still to be Resolved by Town		

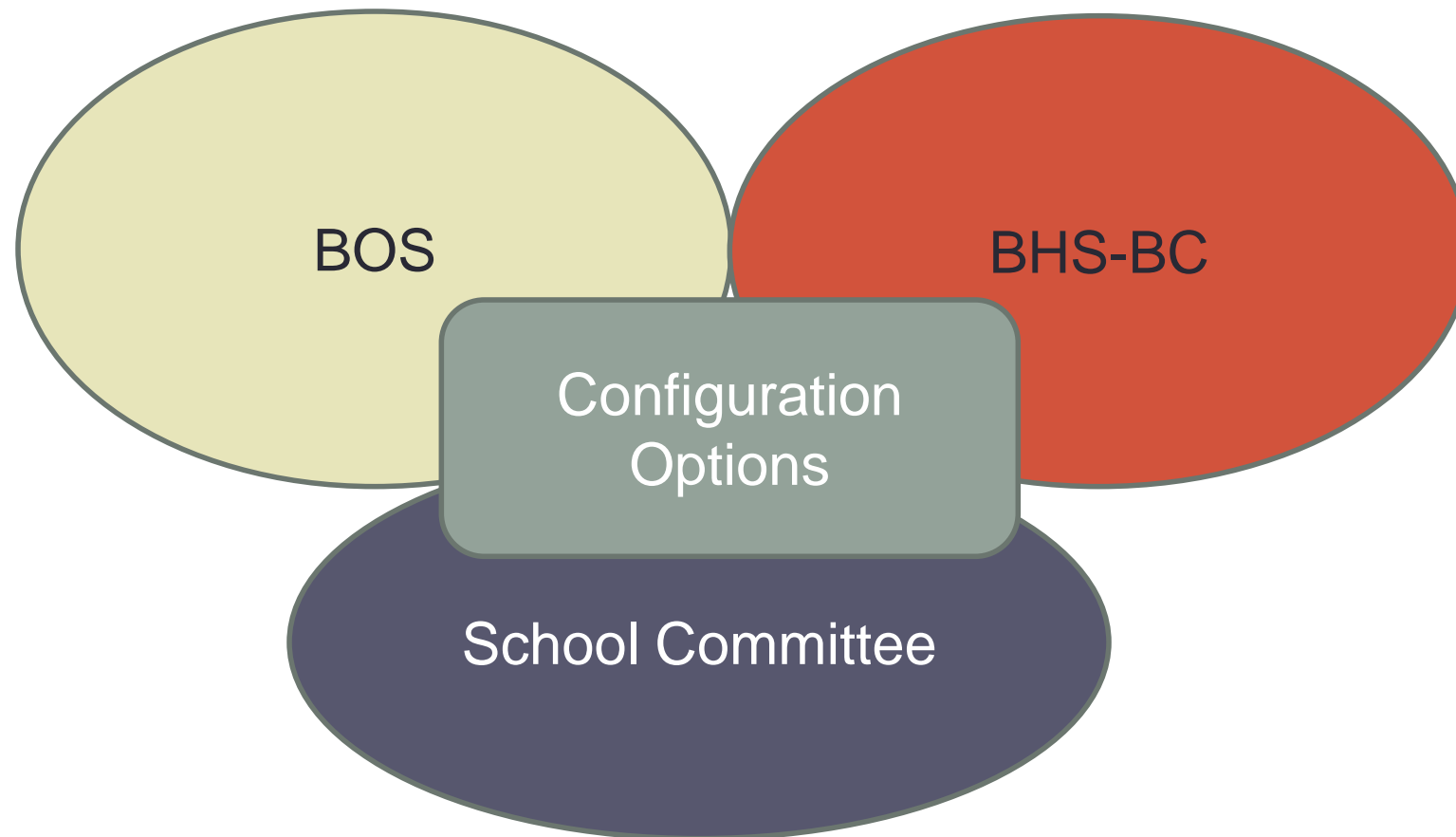
2. Enrollment, Class Size and Space Issues

BHS – BC/ MSBA: Education Facilitator

- The BHS-BC has enlisted the support of a Facilitator who specializes in supporting districts through the education visioning process when building a new school.
- The person has met with a small team of BPS educators and we are currently planning two “community” all day sessions and one “educator” session.
- These forums will generate discussion and answer questions on what the district vision of good “teaching and learning” is and how this work can be enhanced by new space.
- These forums will also outline careful separation and educational connections of each of the three grade configuration options.

2. Enrollment, Class Size and Space Issues Challenges

Decision and Roles on Configuration Options



Enrollment Budget Summary – Operating Budget

- 5 Positions in FY18 Budget will go directly to counter high enrollment and class size needs
 - 3 Elementary teacher positions to offset high class size
 - 1 Elementary math intervention teacher to support the needs of students in large classes
 - 0.6 High School FTE to provide programming to reduce the number of unscheduled students
 - 0.4 Middle School FTE to support Special Education programming
- Adding another regular education school bus, for the second year in a row (totaling 8), to accommodate increased enrollment, at all levels

Enrollment Budget Summary – Capital Budget

- To date BPS has increased classroom space by over 15 additional classrooms internally and with modular space over the last two years
- We now have 6 modular spaces at the Chenery and 6 modular spaces at Belmont High School
- The Space Task Force will be recommending to the Capital Budget Committee for consideration of 4 modular classrooms at the Elementary level

FY18 Budget Planning

3. Budget Planning

In planning for FY18 we focused on:

1. Implementing Year 3 of our three year fiscal plan from the Financial Task Force Budget.
 1. Utilizing the 5.0 FTEs to reduce class size, address enrollment and serving student instructional needs
 2. Addressing transportation issues related to increased enrollment
 3. Providing instructional materials and supplies to teachers and directors to support current and ever-increasing enrollment

3. Budget Planning (cont.)

2. Aligning our budget to the Strategic Plan

1. Providing professional development on prioritized initiatives, such as Social-Emotional Learning (SEL) and achievement gap
2. Continuing a budget model of supporting textbook, ebook, and instructional materials for each department/school, utilizing a centralized approach, based on district priorities
3. Instituting online registration for all students grades K-12 in order to
 1. Balance enrollment increases and class size issues
 2. Make the process more efficient for the district and for parents

3. Budget Planning (cont.)

3. Aligning our budget to the Strategic Plan (cont.)

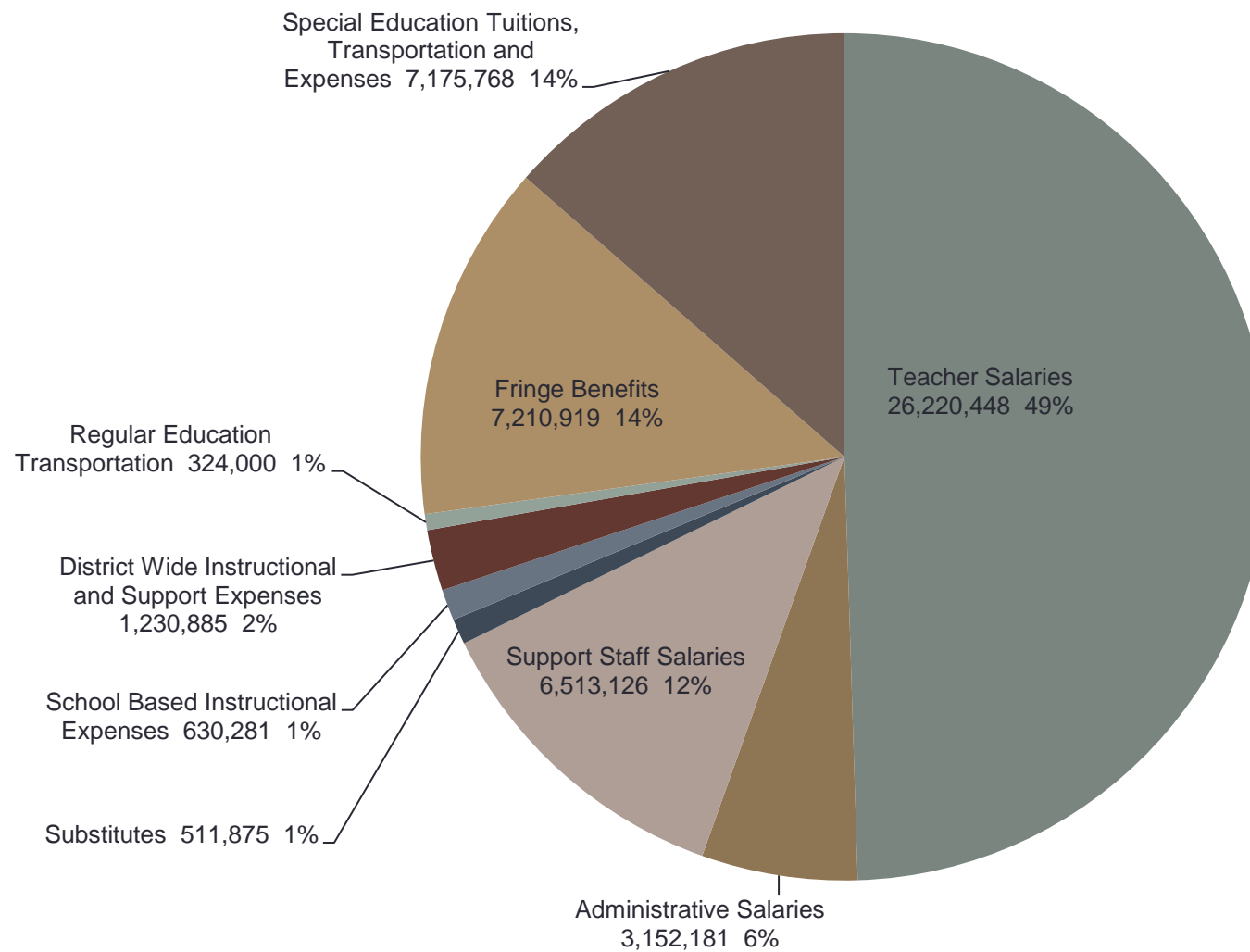
4. Supporting district technology needs for mandated testing and for student and classroom use
5. Allocating funds for incidental costs of increasing enrollment in areas such as texts, materials and supplies, student services supports and non-instructional staff, where we are at or over capacity

3. Budget Planning – Financial Highlights

1. The total General Fund School budget for FY18 is \$52,969,484, which is an increase of \$ 2,842,901, or 5.7% over FY17
2. The FY18 Budget includes:
 1. All FY17 positions, plus 5 additional teachers to address increasing enrollment
 2. Increase in health insurance premiums at 9% over FY17 rates
 3. Special Education contract services and transportation budgeted at 7% over FY17 budget (Task Force index factor)
 4. Special Education tuition General Fund budget is level funded from FY17, with an additional 7% being charged to FY17 State Circuit Breaker funds (one-time offset)
 5. One additional regular education school bus, for the second year in a row (bringing the total to 8 in FY18)
 6. Centralizing increases for texts, materials, supplies and professional development; and budgeting funds in district-wide accounts to allocate funds strategically, in line with district priorities

3. Budget Planning

FY18 General Fund Budget
Dollar Amount and % of Total by Category
Total Budget \$52,969,484



3. Budget Planning – Technical Assumptions

1. The budget includes all current positions plus the 5 FTEs included in the Three Year Fiscal Plan
2. Health Insurance will increase by 9%
3. Non-salary line items indexed by Task Force model, including 7% for Special Education tuitions, transportation and contract services
 1. Reduce the increase in out of district tuition lines from 7% to 0% to support Town budget
 2. 7% expected for out of district increases to be offset by State Circuit Breaker funds received in FY17, as a one-time funding source

3. Budget Planning – Technical Assumptions (cont.)

4. Added one additional regular education bus for FY18 (totaling 8) to address increased enrollment-driven ridership
5. Capital funds will requested to support the acquisition of classroom furniture, technology and instructional materials as well as up to 6 modular classrooms at the elementary level to reduce class size
5. Federal grants indexed over FY17 for contractual increases for staff assigned
6. User fees will remain the same for FY18

3. Budget Planning – Primary Cost Drivers

1. Student enrollment

1. Increased has by approximately 100 students each year for the past 5 years
2. Enrollment is expected to increase by an estimated 100 students through FY20

2. Consistently increasing enrollment for multiple years has resulted in the need for:

1. Addition of professional and non-professional staff
2. Increase in supports for services for mandated costs (Special Education and ELL)
3. Maintain level of purchases texts/materials/supplies, technology, equipment, furniture
4. Additional transportation services for regular education and Special Education

3. Health insurance premiums increasing by 9% for FY18, for existing and new staff being added

3. Budget Planning - Three Year Fiscal Plan FTEs: Original

Level	Year One (2015-2016)	Year Two (2016-2017)	Year Three (2017-2018)
Elementary	1.0 Grade 4 Teacher 1.0 Kindergarten Teacher 1.0 Grade 1 Teacher	1.0 Grade 2 Teacher	1.0 Grade 3 Teacher
Middle	1.0 Grade 5 Teacher 1.0 Unified Arts Teacher	1.0 Unified Arts Teacher 1.0 Guidance Counselor	
High	3.0 FTEs for reduction of the non-engaged/non-scheduled students	1.0 FTE for reduction of the non-engaged/non-scheduled students 1.0 Guidance Counselor	1.0 FTE for reduction of the non-engaged/non-scheduled students
District-wide	2.0 English Language Learner Teachers		1.0 Technology Staff 1.0 Instructional Technology Specialist 1.0 SEL Staff Person
Total FTE Count	10.0	5.0	5.0

3. Budget Planning - Three Year Fiscal Plan FTEs: Updated

Level	Year One (2015-2016)	Year Two (2016-2017)	Year Three (2017-2018)
Elementary	1.0 Grade 4 Teacher (1.0 Kindergarten Teacher) 1.0 Grade 1 Teacher	1.0 Grade 2 Teacher 1.0 Kindergarten Teacher (from FY16)	1.0 Grade 3 Teacher 4.0 Teachers
Middle	1.0 Grade 5 Teacher 1.0 Guidance Counselor (from FY17) 1.0 Unified Arts Teacher	1.0 Unified Arts Teacher (1.0 Guidance Counselor) moved to FY16 1.0 Special Education Teacher	0.4 Special Education Teacher
High	3.0 FTEs for reduction of the non-engaged/non-scheduled students	1.0 FTE for reduction of the non-engaged/non-scheduled students 1.0 Guidance Counselor	4.0 0.6 FTE for reduction of the non-engaged/non-scheduled students
District-wide	2.0 English Language Learner Teachers		1.0 Technology Staff 1.0 Instructional Technology Specialist 1.0 SEL Staff Person
Total FTE Count	10.0	5.0	5.0

Process Steps

1. Draft 1 FY18 Budget presented to the School Committee on 2/7/17.
2. Presentation of the FY18 School Department Budget to a joint meeting of the School Committee, Board of Selectman and Warrant Committee on 2/13/17. Budget updated to Draft 2, reflecting reduction of General Fund out of district tuition increase from 3.5% to 0%.
3. There will be further discussion on the FY18 Budget at upcoming Finance Subcommittee meetings and School Committee meetings.