

Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

Submitted by John P. Phelan, Superintendent

Date: January 20, 2015

BACKGROUND

In the fall of 2013 the Town of Belmont formed the Financial Task Force (FTF) to research and analyze the current and future expenditure and revenue issues to support the quality municipal and educational services to the Town. One of the five FTF Working Groups was Education.

As part of the Town of Belmont's Financial Task Force, the Belmont School Department and the Belmont School Committee commissioned eight (8) Modeling Groups to support any and all long range planning efforts of the Town. Former Superintendent of Schools Dr. Tom Kingston commissioned the Modeling Groups to identify and collect data in order to inform the long-range set of projections to meet the district's needs in the subsequent three to five years.

Those eight modeling groups were:

- | | |
|-------------------------------|--|
| 1) Salary and Compensation | 5) Instructional Modeling and Innovation |
| 2) Special Education | 6) Supplemental Revenue Sources |
| 3) Enrollment | 7) Student Life |
| 4) Operations and Maintenance | 8) Instructional Technology |

PURPOSE

The eight modeling groups' members were comprised of School Committee members, Warrant Committee Members, Town Officials, School Department Faculty and Staff, and Community Members. Specifically, the groups were charged with gathering data, analyzing trends and needs, and providing recommendations. The hope and expectation was that these data sets would help develop long-range financial projections and rationale for continued or expanded support.

The Eight Modeling Group Reports were presented to the FTF, the School Committee, and posted on the Belmont Public Schools website. Please see the link to the BPS webpage that houses modeling group reports - (<http://www.belmont.k12.ma.us/bps/School-Committee/Public-Documents/Article/394/Modeling-Group-Reports>)

Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

LITERATURE REVIEW OF MODELING GROUP SUMMARIES

The Enrollment Modeling Group discussed the increasing number of students entering the district at every grade level. The group used the NESDEC data in its attempt to predict future enrollment, but was transparent about the predictability of this data given new growth areas in Town that could produce more students. Additionally, the report outlined the increasing number of international students that have moved into Belmont, making future predictions difficult due to the high mobility rate of these families. Recent enrollment trends have produced students new to the district who are in need of more extensive English Language Education (ELE) services. As the group predicts that enrollment will increase by approximately 700 students over the next ten years, the issue of space becomes a major concern. Recommendations were made that would support temporary space at the elementary level and the need for more long range and permanent buildings or additions to our schools, to support the overall enrollment growth.

The Student Life Social Emotional Learning (SEL) Group outlined several challenges our school district faces as it attempts to support all children in our schools. The analysis suggested an increase in the number of students needing support for counseling and stress reduction. The recommendations ranged from partnering with our Parks and Recreation Department for open gym times, to over \$900,000 in staff, professional development and curriculum needs.

The Instructional Modeling Group analyzed the ever increasing external mandates that the state and federal agencies are putting on our teachers, students, and schools. Valuable time spent on initiatives like the New Evaluation Tool, District Determined Measures (DDMs), Kindergarten Assessment, and the transition from MCAS to PARCC is taking its toll. These mandates are sapping the creative energy that our staff has historically used to provide innovative and engaging curriculum, programs, and lessons to our students. The district has done a very good job in the unique and thoughtful approach to these mandates in an attempt to lessen the burden on faculty. More professional time, coaching sessions, and training on instructional strategies, that are authentic to our teachers and students, are essential.

The Instructional Technology Modeling Group discussed the need for a vision for students and staff to access technology in school and at home effectively. Technology is used well in areas of online fee payment, Edline, and data collection. The next step is to use technology for instructional innovation. This will require professional development, technology instructional integration specialists, and additional investment in devices. The need for an infusion of devices will only be exacerbated by the need to conduct the Department of Elementary and Secondary Education (DESE) mandated standardized exams electronically and not by pencil and paper.

The Special Education Modeling Group identifies that the Belmont Public Schools population of students on Individual Education Plans (IEP) is lower on average than the state. Additionally, that the “inclusion” rate of special education students in mainstream classroom settings in the Belmont Public Schools (a highly recommended practice) is higher than the state average. It is noted that BPS spends 50% of its special education budget on Out of District (OOD) placement of students and that 34% of the overall BPS budget is spent on special education services to its children. The report notes the need for a

Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

long term investment in early childhood education, Response to Intervention (RTI), math in particular, and well as needed space for such programmatic supports. All of these recommendations come with the requirement of additional resources.

The Operations and Maintenance Modeling Group outlined the “capital needs” of the district, as well as the general and annual maintenance work needed, and the costs attached. The hope of the modeling group was that the funding would be made available so that the district could be “proactive” instead of “reactive” in our approach to facility needs. The group outlined the hope to hire “licensed” trade staff to provide the work *in house* in an attempt to reduce the costs of contracting outside vendors.

The Supplemental Revenue Modeling Group provided a solid overview of the current funds, raised by fees and donations, to support teachers and students. It discussed the potential for the district to consider revenue generating opportunities in areas of naming rights, advertising, sponsorships, and corporate partnerships. The report outlined and thanked the many volunteer funding groups that support our students and schools so generously including: Foundation for Belmont Education, PTOs/PTAs, POMS, PATRONS, the Brendan Grant Foundation, and all the “Friends” groups. The Belmont Public Schools could not achieve the success it currently enjoys without this extraordinary community support.

The Compensation Modeling Report did a thorough review of various compensation systems, gave the financial context and data of municipal compensation systems, as well as their view of the issues that exist with the current system in Belmont and statewide. They made recommendations for the next round of contract negotiations that would be more in line with Town’s available revenue capacity.

LEADERSHIP FRAMEWORK

As the new fiscal year began in July 2014 the Leadership Council of the Belmont Public Schools used the Modeling Group summaries to inform the work for the 2014-2015 school year. This will be the foundation for the next Strategic Plan process, beginning in the spring of 2015. These 8 documents have been and will be used as guiding documents for the school district.

The Leadership Council reviewed the Modeling Group Reports in August 2014, over a three day retreat. At the completion of that review there was a clear consensus that two of the modeling group reports and challenges were a priority: Enrollment and Student Life (Social Emotional Learning). The Leadership Council considered these two areas “pressure points” on the district that needed to be addressed immediately. The prioritization of this research was the building block for the next discussion held by the Leadership Team: What are the challenges of the district and what do you need to meet those challenges? This foundational work led the Leadership Council to the conclusion that there were some clear and necessary budget assumptions identified to inform the budget process over the next three years. This data was the basis for what is being reported in this Financial Task Force report.

Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

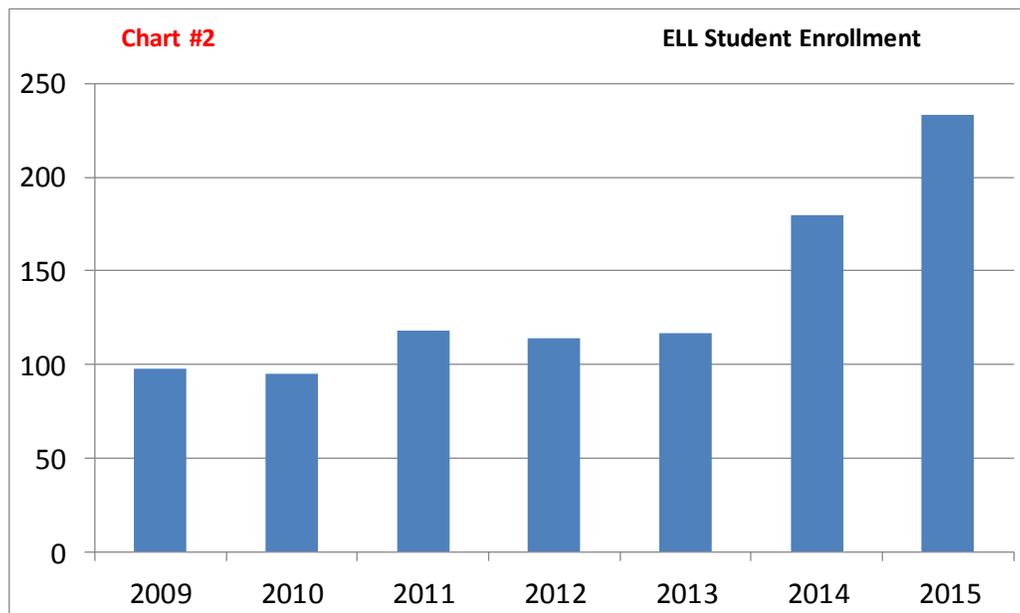
The Leadership Council engaged in an exercise that involved the review of each of the modeling group reports. Each report was summarized and presented to the entire group. In the aggregate, the Modeling Group reports concluded that there were more needs than would be a feasible “ask for” in any one budget year. With that said, the Leadership Council attempted to keep the suggestions within a certain “acceptable” parameter, and to suggest a three (3) year plan to address the school department needs. These projections would only maintain our programs and supports for students.

Please see the next four charts that outline our increase in enrollment over the last three years and its corresponding increase in our subgroup populations of students.

- Chart #1 demonstrates the overall enrollment increase as measured by the Department of Elementary and Secondary Education’s “October Report.”

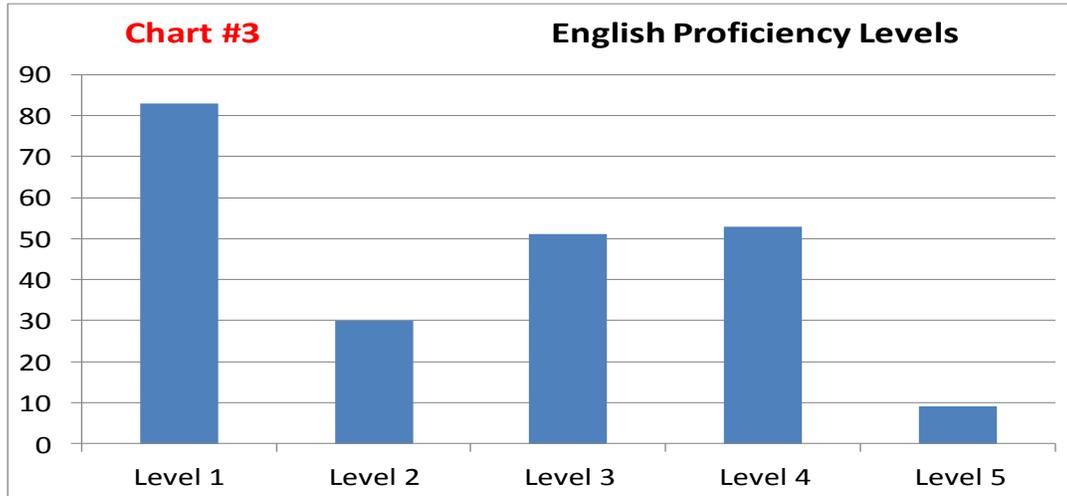
Chart #1	Oct. 1, 2009	Oct. 1, 2010	Oct. 1, 2011	Oct. 1, 2012	Oct. 1, 2013	Oct. 1, 2014
BPS K-12 Enrollment	3905	3877	3900	3994	4136	4222
Difference, year to year		-28	23	94	142	86
				Difference, 2009 to 2014		317

- Chart #2 indicates the increase in the English Language Learner population of students – the rate of this increase is a proportionally higher rate.



Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

- Chart #3 indicates that the additional ELL students we are enrolling have the DESE designation of Level 1 – which indicates the high need of intervention



- Chart # 4 indicates the Out of District (OOD) Enrollment:

Chart #4	Year	June, 2012	June, 2013	June, 2014	January 20, 2015
	# of OOD Students	91	81	87	95 (5 additional in cue)

RECOMMENDATIONS

1. Belmont Public Schools Projected Staffing Needs

It should be stated that our enrollment needs look different at each of the three levels. At the elementary level, the need to add a strand (another full class) at each level over time, with corresponding Unified Arts support, is essential. At the middle school, the allocation of a grade five teacher will reduce class size in that grade only, the guidance position will address the 430 students to one counselor ratio, and last, but most importantly, the two Unified Arts teachers, over two years, will only begin to address the issue of middle school students sitting in large study halls each period. At Belmont High School, the first three positions will be allocated to address the increasing number of students who are not engaged during the school day. The number of unengaged students ranges from

Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

96 to over 800 during certain days and mods (periods) during the week. The number of students not engaged in meaningful learning experiences during the school day is disturbing practice that needs to be addressed immediately.

You will see in the three year plan staffing chart below that we will be adding two additional English Language Education teachers. These positions are mandated by the state due to our increasing enrollment of this sub group of our increasing over all student population,

<i>Level</i>	<i>Year One (SY 15/16)</i>	<i>Year Two (SY 16/17)</i>	<i>Year Three (SY 17/18)</i>
Elementary	1.0 Grade 4 Teacher (Wellington) * 1.0 Kindergarten Teacher * 1.0 Grade One Teacher *	1.0 Grade 2 Teacher	1.0 Grade 3 Teacher
Middle	1.0 Grade 5 Teacher * 1.0 Unified Arts Teacher(s) *	1.0 Unified Arts * 1.0 Guidance Counselor * #	
High	3.0 FTE's for Reduction of non - engaged/non-scheduled students *	1.0 FTE Reduction of non- engaged/non-scheduled students * 1.0 Guidance Counselor *#	1.0 FTE Reduction of non-engaged/non- scheduled students *
DW	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
	(*) Indicates <u>Enrollment</u> need (#) Indicates <u>SEL</u> need		

Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

2. Aligning Budget Expenditures in Key Areas of FY15 Shortfall

Additionally in working with the Director of Finance and the Director of Student Services, we also identified areas in the budget that were not fully funded and would need an increased allocation projection. These budget line items make up the majority of the current FY15 shortfall and thus need to be fully funded in FY16.

The areas were:

- **Special Services Contracted Service** budget line has steadily increased over the last several years. These are services provided to our students that are “bills” that will need to be paid. This accumulated shortfall is approximately \$425,000.
- **Out of District Students** budget line allocated funds on the assumption that the Belmont Public Schools would have 81 students to serve in the 2014/15 school year. By June of 2014 and now in the second fiscal quarter of this year that number has risen to 95. Over the past eight years the number of OOD students has fluctuated between these two amounts (4 years in the 80’s and 4 years in the 90’s). The FY15 shortfall is projected to be approximately \$384,000. This amount will increase by approximately \$276,000 since LABBB credits used in FY15 to balance this line item will not be available in FY16.
- **Special Education Transportation** budget line increased correspondingly to the increase in our aggregate enrollment and that of the increase in OOD students. This increase is the area will be approximately \$200,000.
- There are expenditures that exist in the public school budget each year that involve tutors, over time, and stipends that cover work with special education students, summer early childhood, and summer programming that have not been budgeted accurately. Given the short fall in this line for FY15 the recommended allocation to cover this line item is \$127,000.

3. Space Needs Due Increased Enrollment

With the increase in enrollment the need for increased classroom space is inevitable. There has been a Space Task Force commissioned, and an architectural firm hired, to project the needs of the Belmont Schools, as it relates to increased enrollment and corresponding classroom space. At this point in time there is a concern that the elementary level will need to increase by at least one additional strand (one more grade level class for each grade level K-4) to provide the capacity and ensure appropriate class sizes, based on School Committee class size guidelines. This would result in the need for modular classrooms and/or a more permanent solution by September 2016 at the elementary level.

Additionally, the space at the Chenery Middle School has been exhausted with the increase in students enrolled. The Chenery currently does not have enough space to support the current level of student enrollment and will not have the capacity to handle the current cohort sizes that are moving up from the elementary schools. As evidenced in the current enrollment chart, the wave of students moving up through the district is concerning. The increase in enrollment coming from the elementary

Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

level, combined with the need to provide classes and programs for those students in study halls, will result in the need for modular classrooms by September 2016. The permanent answer to the space needs at the middle school will need to be part of larger conversation of how we organize the district in future years. At this time the middle school presents the biggest concern from a lack of space perspective.

Belmont High School is out of space. Currently there are 31 rooms that are shared by 2 teachers and 4 rooms shared by 3 teachers. Given the need for additional class offerings for students who are not engaged during the day, and a wave of enrollment increases coming each year, the need for space at the High School is critical. The graduating class of Belmont High School in 2014 was 260 students. The 2014 entering kindergarten class was 354 and that all five grade levels at the elementary level are over 330 students.

There are teachers who do not have their own classrooms and travel to two or more classrooms to teach. If we want to increase the amount of teachers at the middle or high school, to reduce the amount of unstructured, non-educational time (frees), the district will struggle with the capacity to do so, without adding temporary space or building more permanent space.

It should be noted that these staffing projections only provide the needed respite in dealing with the increased enrollment and our communities' collective concern with our students' social emotional needs. There are no new programs or initiatives in this projection.

As Superintendent of the Belmont Public Schools I would like to thank each and every person who dedicated their time and effort to this work. The work of each modeling group was extensive and thorough. Each report outlined recommendations in their respective areas moving forward. These reports will be the guiding tools for the next Strategic Plan, developed by the faculty, staff, parents, Leadership Council, the School Committee, and the community.

CONCLUSION

The Belmont Public Schools have a long and valued reputation for providing high quality education to students. Our schools are one of the major reasons that the Town of Belmont is such an attractive community to raise a family, thus one of the main reasons home values stay so high. This is exemplified by the current Level One status from the Department of Elementary and Secondary Education. Belmont is one of approximately five K-12 districts in the entire Commonwealth of Massachusetts to receive this academic recognition. It should also be noted that there are extraordinary student outcomes in areas of SAT and AP scores and college acceptance to the best universities nationwide. Additionally, the district provides amazing experiences for our young people through clubs, activities, and athletics. Most notably in the areas of performing arts – the music and art programs are exceptional. It is not surprising that, when our students graduate from the Belmont Public Schools, they are prepared on many levels, are accepted at and attending the best schools in our country, and are well-rounded young adults ready to

Town of Belmont
Financial Task Force
Modeling Group Executive Summary Report

enter the world. The proposed challenges, projections, and recommendations outlined in this summary can only conclude that, as the school department experiences an increase in enrollment, it needs a corresponding increase in funding to maintain the current level of excellence. Anything less would risk a concerning structural decay of our schools, leaving our students with crowded classrooms, low teacher to student ratio, reduced supports to access potential, reduction in program offerings, and ultimately the foundation needed to maintain the Level One status and the quality of student outcomes the community of Belmont has experienced in the past and deserves in the future.