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To: John P. Phelan, Superintendent
From: Janice Darias, Assistant Superintendent *JD*
Date: May 3, 2017
Re: Belmont Community Education Study

I met with community member Marsha Semuels on March 15 and April 20 to discuss ideas to expand Belmont's community education program. The conversations led to a proposal to consider expansion of Belmont Community Education, which I've enclosed with this memo. Ms. Semuels has generously offered *pro bono* consulting for this project, will conduct most of the research. To support the work, I will chair a steering committee that will meet to finalize the proposed study in June, and again in the fall to review the results of the data and information gathering and make recommendations for next steps. An important stipulation of all of this work is that the program must be, at a minimum, self-supporting, and, ideally, revenue-generating.

The purpose of the committee is to assess the feasibility of expanding Belmont community education options for adults, teens and children. In the course of this work, the committee will:

- consider the demand for a larger range of programmatic offerings;
- understand similar programs in surrounding towns and their administrative and financial structure;
- consider the resources and tasks required to transition to an expanded program;
- think about how to best coordinate programs currently offered by several town departments;
- explore the opportunity to expose the community to local businesses through on-site programming; and
- make a recommendation to the School Department about whether community education should be expanded and what would be required to do so.

The first meeting is scheduled for 7:00-8:30 on June 8, 2017. I will provide you with updates as the work proceeds, and will be happy to answer any questions you have.

Enclosure: Study to Consider Expansion of Belmont Community Education

STUDY TO CONSIDER EXPANSION OF BELMONT COMMUNITY EDUCATION

Purpose

The purpose of this project is to assess the feasibility of expanding Belmont community education options for adults, teens and children. In the course of this work, we will consider the demand for a larger range of programmatic offerings; understand similar programs in surrounding towns and their administrative and financial structure; consider the resources and tasks required to transition to an expanded program; think about how to best coordinate programs currently offered by several town departments; explore the opportunity to expose the community to local businesses through on-site programming; and make a recommendation to the School Department about whether community education should be expanded and what would be required to do so.

An important stipulation is that the program will be self-supporting and, if possible, return overhead revenue to the School Department and other town departments that provide space and services. Since an expanded program would require additional administrative support and an investment in marketing, it is understood that grant and/or business underwriting would be essential, at least in initial stages.

Introduction

Belmont is a highly-educated community, with 78% of the population having completed college or graduate school. In addition, many residents serve as faculty at nearby universities such as Harvard, MIT and Tufts. The mean income is \$141,000 and household discretionary spending on education is much higher than the national average. A relatively large percentage of the community (20%, larger than surrounding towns, Boston and the US) is foreign-born, indicating a potential demand for ESL programs. The combination of these demographic factors make Belmont particularly ripe for a diverse and expanded community education program.

While community education is a long-standing component of the School Department, the range of choices is small and not heavily marketed. In fact, during the past year, the brochure was not printed or mailed to town residents, as has occurred in the past. In contrast, several surrounding communities offer a very rich array of courses and programs that are published in well-designed catalogues and on line sites, with distribution to Belmont residents through mailing lists and “drops” in various public and business locations. In addition, unlike surrounding communities, Belmont’s community education program has very sparse offerings for teens and does not include options for children as well as vacation and summer programs.

In addition to the Belmont School Department program, courses are offered through other town departments and entities such as the Belmont Summer Enrichment Program, the Beech Street Center, the Media Center and the Belmont Public Library, with many of these efforts growing each year to response to demand. In addition, Vision 21 sponsored a very successful panel featuring Belmont residents, and plans to undertake more such events in the future, in response to their survey that demonstrated an interest in community interaction opportunities in the town.

An initial informal survey reveals that programs in surrounding towns have several common attributes:

- they are self-supporting;

- they use town buildings such as senior centers and town conference rooms for daytime classes, while depending on schools for evening activities;
- they offer discounts for seniors;
- they incorporate summer and vacation learning and activities for children and adults;
- they market to residents of other towns;
- they advertise through attractive catalogues that are distributed widely;
- they often sponsor lecture series and other enrichment activities in partnership with Boston area programs, e.g., historical/architectural walks through Boston by Foot, kayak and canoe trips through Charles River Canoe and Kayak.

Structure of Work

The scope of the work involved, as described as in the sections below, is comprehensive and incorporates many aspects and interests in the town. Consequently, a Steering Committee is being established to help guide the work, contribute to the knowledge base, and serve as a conduit for ideas and broader input.

The Committee will be convened in early June to discuss and revise the feasibility proposal and again in September to consider the results. While most of the work will be conducted by Marsha Semuels, who is serving as *pro bono* consultant for this project, Committee members will be asked to use their contacts and knowledge in the information gathering process.

The Committee members, their affiliations and contact information are as follows:

Name	Affiliation	Contact Information
Janice Darias, Chair	Assistant Superintendent, Belmont Public Schools	Jdarias@belmont.k12.ma.us
Lisa Fiore	Chair, Belmont School Committee	lfiore@lesley.edu
Kelly Higgins	Director, Belmont Community Education	klhiggins@yahoo.com
Lillian Hartman	Senior Center Coordinator, Beech Street Center	Lhartman@belmont-ma.gov
Peter Struzziero	Director, Belmont Public Library	pstruzziero@minlib.net
Jeff Hansell	Executive Director, Belmont Media Center	jeff@belmontmedia.org
Katie Kelley	Co-Director, Belmont Summer Enrichment Program	kkelley@belmont.k12.ma.us
Elizabeth Dustin	President, Foundation for Belmont Education	eadustin@netscape.net
Margery Miller	Professor emeritus, Lesley College	mmiller@lesley.edu
Anne Helgen	Belmont Recreation Commission Board	annehelgen@hotmail.com
Stacey Zawal	Owner, Get in Shape for Women, Cushing Square	staceyzawal@me.com
Daniel Acsadi	Daniel Acsadi, Director of Music, Powers Music School	dacsadi@powersmusic.org
Marsha Semuels	Pro bono consultant	mhsemuels@gmail.com

Needs Assessment

Participation decreased in the Belmont Community Education program in the 2016-2017 school year. The Committee will examine enrollment numbers over the past three years, in total and by class, to understand if the decline is related to the decision not to print and mail the traditional program pamphlet to residents this year, the small range of available choices, or other reasons.

To gauge the potential market in Belmont, the following resources will be explored:

- Interest expressed to the Community Education Board;
- Demographics as compared to surrounding communities;
- Results from the Vision 21 survey;
- Enrollment in programs at the Beech Street Center and how this has changed over the past three years;
- The scope of community programs at the library, e.g., lectures and talks, teen programs such as Python;
- Media Center courses and enrollment;
- Enrollment and programs in the Summer Enrichment Program;
- Ideas under discussion by the Belmont Arts Association to increase the number of gallery visitors; and
- Enrollment of Belmont residents in community education programs in other towns, if available.

Market Analysis

The existence of well-developed community education programs in other towns provides an excellent opportunity to understand what would be required to undertake an expansion in Belmont. Using contacts through the Belmont School Department and School Committee, the Steering Committee and other resources, a range of information will be collected.

Several communities will be chosen for analysis, including Brookline (the oldest and largest program in the state), Arlington, Bedford, Concord, Lexington and Watertown. In addition to what can be gleaned from catalogues, the Committee will seek the following information:

- Enrollments in total, and for types of courses in particular, and how enrollment has changed over time;
- How faculty are recruited;
- How new courses are developed;
- The scope of children and teen programs and demand for these programs;
- Three year budgets, including amounts allocated for teacher stipends, administrative costs, and marketing;
- Overhead expenses, e.g., rent and utilities, and how these expenses are incorporated in the budget;
- Governance and administrative structure; and
- Coordination with other town departments.

Developing Recommendations

Using the information gathered above and feedback from Steering Committee members, a report will be formulated that describes the analysis and recommends how Belmont should approach community education in the future.

In doing so, the following questions will be considered.

- What should be the mission and vision of community education in Belmont?
- Does it appear that demand exists and, if so, which population sectors are most ripe?
- What kind of oversight and advisory structure is optimal?
- What level of administrative support is required?
- How should marketing be conducted and what will it cost?
- How would new courses be developed and would faculty be recruited?
- What should faculty be paid? Might some faculty be compensated with small honoraria?
- What space is available in school buildings, at the Beech Street Center, the library and in other public buildings?
- Would businesses be interested in hosting programs and what, if any liability is involved?
- Can Belmont forge partnerships with organizations such as Boston by Foot and Habitat, to provide broader nature and cultural opportunities? If so, what is Belmont's liability?
- How much overhead should be returned to town departments?
- Can the current online enrollment system handle a larger demand?
- What is best structure for coordinating the currently decentralized system? Among possible options are: centralization, continue decentralized system but with centralized marketing, centralized marketing and enrollment but decentralized administration accompanied by revenue and expense.
- What is a reasonable budget for the next three years (assuming phased-in growth) and how long would it take to break even?
- What are potential funding sources until the program breaks even and to support marketing?
- Should we replicate other towns by developing vacation/summer programs for children and teens?
- When should an expanded program be launched and how should it be phased in?

Deliverables

To elicit information from other towns, an introductory letter will be written and distributed to the sites chosen. Multiple meetings with businesses, associations and departments within the town are anticipated to gather information and develop relationships. An initial exploration of underwriting potential from local businesses will occur if it appears that an expanded program is warranted. The final product will be a detailed report to the School Department and School Committee that includes all the components described above. In addition, the report will contain appendices with data gathered from other towns, comparative demographics and other relevant material.

Timeline

The study will begin officially with the formation of the Steering Committee and its initial meeting on June 8. With the bulk of research occurring over the summer, the Committee will meet again in

September to discuss findings. A final report will be completed by early October for review by the School Department.

Background on Marsha Semuels

Marsha Semuels is a highly-experienced planner and administrator who has successfully executed a wide range of strategic initiatives in complex organizations. Her accomplishments include initiation and development of new academic programs, project management, problem solving, direction of research and data analysis, and proposal writing. She has strong entrepreneurial skills and has led initiatives in change management, strategic planning, operations improvement, space planning and management, management of accreditation processes, and budget and financial planning. Prior to founding her consulting business, she served as executive administrative dean at Tufts University School of Medicine and as assistant provost at Harvard University. She has lived in Belmont for nearly forty years. Both her children attended and graduated from Belmont Public Schools.