

Belmont Public Schools FY21 Draft 1 Budget Presentation

School Committee

February 4, 2020

FY21 Budget Process

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1. Using FY20 to Inform FY21

1. Using FY20 to Inform FY21

1. Context of Expenditures

In FY20 we:

- Are monitoring the FY20 Q2 to ensure a balanced budget in June.
- Are monitoring Special Education budget lines to ensure our funding is in line with our 3-year Out-of-District Funding Plan.
- Meeting with the Leadership Council to guide our strategic plan.

1. Using FY20 to Inform FY21

Per Pupil Spending

- Review of per pupil spending report by the Department of Elementary and Secondary Education (DESE) from FY11-FY18 (the most recent year available)
- Cohort districts include:
 - Comparable districts
 - Neighboring communities
- Listing of districts:

Acton-Boxborough	Concord	Newton	Wellesley
Arlington	Concord Carlisle	Sharon	Westborough
Bedford	Dover	Sherborn	Westford
BELMONT	Dover-Sherborn	Sudbury	Weston
Brookline	Lexington	Waltham	Westwood
Burlington	Marblehead	Watertown	Winchester
Cambridge	Milton	Wayland	

1. Using FY20 to Inform FY21

Findings

- Belmont has consistently spent less on a per pupil basis than the state average, and the average of cohort districts
- Belmont ranks 24th, 25th or 26th in per pupil spending among 27 cohort districts from FY11-FY18

PER PUPIL SPENDING: BELMONT VS STATE AVERAGE AND COHORT DISTRICTS FY11-FY18 (1 of 3)

	DISTRICT	FY11 \$	FY11 RANK	FY12 \$	FY12 RANK	FY13 \$	FY13 RANK	FY14 \$	FY14 RANK	FY15 \$	FY15 RANK	FY16 \$	FY16 RANK	FY17 \$	FY17 RANK	FY18 \$	FY18 RANK
1	Cambridge	26,305	1	27,018	1	27,474	1	27,163	1	27,569	1	28,399	1	29,206	1	29,520	1
2	Weston	19,352	4	19,915	3	20,579	3	21,653	2	22,768	3	23,899	2	24,458	2	25,367	2
3	Dover	17,607	5	18,313	5	19,323	4	21,336	3	24,263	2	23,233	3	23,335	3	24,039	3
4	Concord- Carlisle	20,066	2	20,525	2	20,751	2	20,446	4	20,760	4	21,585	4	21,877	4	22,472	4
5	Watertown	16,008	12	16,493	10	17,279	7	17,292	11	20,134	5	20,801	5	21,539	5	21,795	5
6	Burlington	15,008	16	15,893	14	16,643	14	17,700	7	19,238	8	19,866	7	20,671	7	21,750	6
7	Waltham	19,741	3	18,899	4	18,866	6	19,502	5	19,940	6	20,242	6	20,673	6	21,649	7
8	Dover- Sherborn	16,495	10	16,434	11	17,123	10	17,650	8	18,673	9	18,999	10	20,253	8	20,970	8
9	Wellesley	15,421	13	15,085	16	17,232	8	17,108	14	18,289	10	18,636	13	19,934	9	20,381	9
10	Brookline	16,556	8	16,626	8	16,924	12	17,291	12	17,652	14	18,866	11	19,649	10	19,922	10
11	Concord	16,637	7	16,893	6	16,098	16	16,457	15	17,517	16	19,169	8	19,324	11	19,916	11
12	Sherborn	15,129	15	15,720	15	19,317	5	18,378	6	19,534	7	19,135	9	18,553	13	19,463	12
13	Newton	16,397	11	16,400	12	17,141	9	17,581	9	18,096	11	18,779	12	19,095	12	19,396	13
14	Bedford	16,963	6	16,600	9	16,993	11	17,226	13	17,839	13	18,120	14	17,959	16	18,903	14

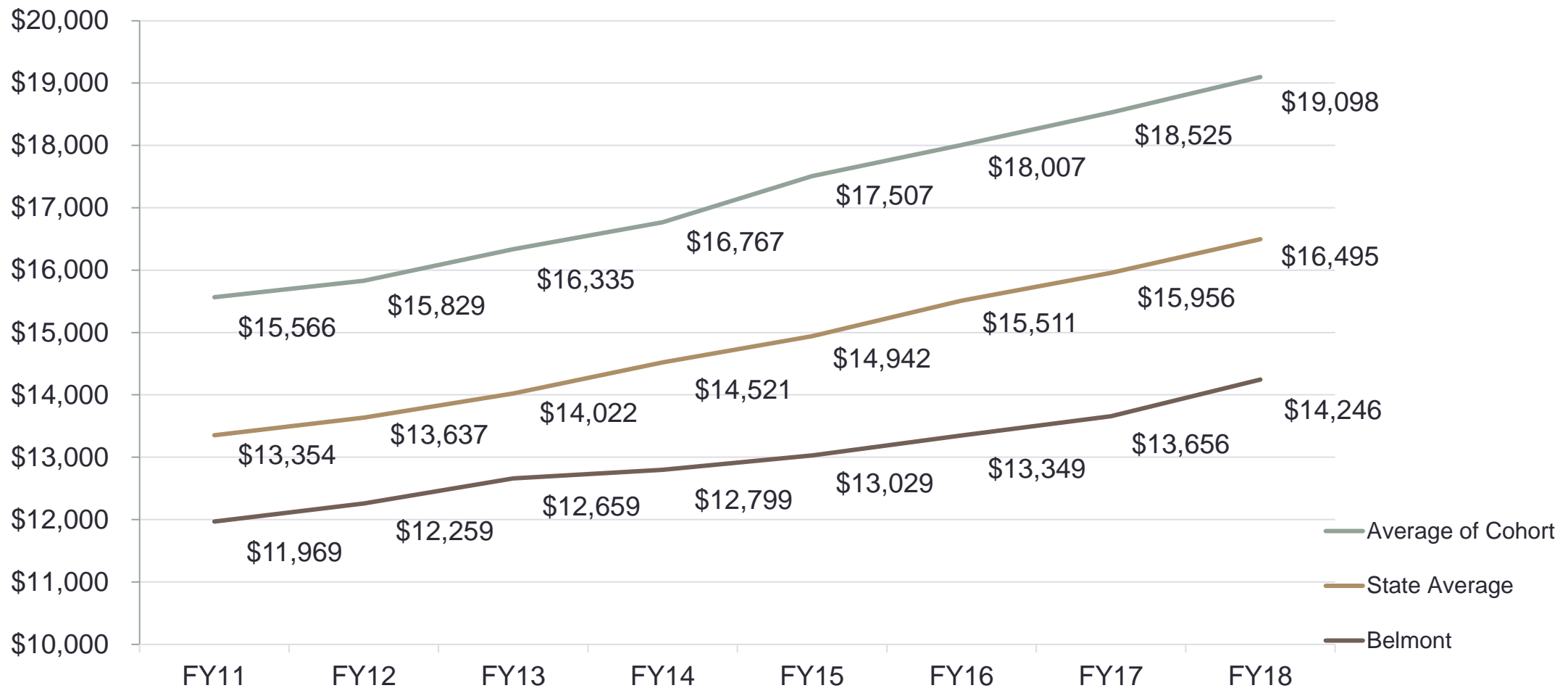
PER PUPIL SPENDING: BELMONT VS STATE AVERAGE AND COHORT DISTRICTS FY11-FY18 (2 of 3)

	DISTRICT	FY11 \$	FY11 RANK	FY12 \$	FY12 RANK	FY13 \$	FY13 RANK	FY14 \$	FY14 RANK	FY15 \$	FY15 RANK	FY16 \$	FY16 RANK	FY17 \$	FY17 RANK	FY18 \$	FY18 RANK
15	Wayland	15,156	14	15,902	13	16,177	15	16,445	16	17,650	15	17,426	16	18,484	14	18,751	15
16	Lexington	16,552	9	16,726	7	16,821	13	17,496	10	17,867	12	18,069	15	18,369	15	18,747	16
17	Westwood	13,999	19	14,197	19	14,827	17	15,337	17	15,833	17	16,713	17	17,631	17	18,310	17
18	Sharon	14,096	17	14,527	18	14,659	18	15,021	18	15,401	18	15,416	19	16,317	18	16,893	18
19	Sudbury	12,359	24	12,899	22	13,426	21	14,246	21	14,797	20	15,268	20	15,632	20	16,556	19
20	Marblehead	12,727	22	12,998	21	12,706	23	13,218	23	13,678	23	14,710	22	15,621	21	16,070	20
21	Westborough	14,007	18	14,545	17	14,306	19	14,736	20	14,813	19	15,548	18	15,649	19	15,839	21
22	Acton-Boxborough	13,182	20	13,697	20	13,962	20	14,937	19	14,016	22	14,745	21	15,283	22	15,698	22
23	Milton	12,613	23	12,816	23	12,992	22	13,499	22	14,116	21	14,388	23	14,936	23	15,469	23
24	Westford	11,179	27	11,449	27	11,838	27	12,529	27	13,118	25	13,528	25	14,131	25	14,806	24
25	Arlington	12,942	21	12,603	24	12,546	25	13,085	24	13,290	24	13,984	24	14,332	24	14,594	25
26	BELMONT	11,969	25	12,259	25	12,659	24	12,799	25	13,029	26	13,349	26	13,656	26	14,246	26
27	Winchester	11,822	26	11,954	26	12,380	26	12,579	26	12,801	27	13,312	27	13,610	27	14,122	27

PER PUPIL SPENDING: BELMONT VS STATE AVERAGE AND COHORT DISTRICTS FY11-FY18 (3 of 3)

DISTRICT	FY11 \$	FY12 \$	FY13 \$	FY14 \$	FY15 \$	FY16 \$	FY17 \$	FY18 \$
State Average	13,354	13,637	14,022	14,521	14,942	15,511	15,956	16,495
BELMONT	11,969	12,259	12,659	12,799	13,029	13,349	13,656	14,246
State Ave vs BELMONT	1,385	1,378	1,363	1,722	1,914	2,162	2,300	2,249
% Below State Average	11.6%	11.2%	10.8%	13.5%	14.7%	16.2%	16.8%	15.8%
Average of Cohort	15,566	15,829	16,335	16,767	17,507	18,007	18,525	19,098
BELMONT	11,969	12,259	12,659	12,799	13,029	13,349	13,656	14,246
Cohort Ave vs BELMONT	3,597	3,570	3,676	3,968	4,478	4,658	4,869	4,852
% Below Cohort Average	30.1%	29.1%	29.0%	31.0%	34.4%	34.9%	35.7%	34.1%

PER PUPIL SPENDING: BELMONT VS STATE AVERAGE AND COHORT DISTRICTS FY11-FY18



Data Sources: <http://www.doe.mass.edu/finance/statistics/ppx15.html>
<http://www.doe.mass.edu/finance/statistics/ppx12-16.html>
<http://profiles.doe.mass.edu/statereport/ppx.aspx>

1. Using FY20 to Inform FY21

2. Context of Revenues

District benefited enormously by the Spring 2015 Override funds in FY16-FY20:

1. Additional positions have been added to address increasing student enrollment
2. Infusion for mandated Student Services costs – Special Education Transportation and Out of District Tuition, and Contract Services
3. FY16 became a new baseline for expenditures of texts, materials & supplies, professional development, and other operational costs

1. Using FY20 to Inform FY21

3. Budget History and Current Status

1. The FY16-FY20 budgets have been managed well
 1. The School Department has partnered with the Town in reducing its budget and/or reverting funds over the past several years
 1. FY18 – Reduced \$334,502 in out-of-district tuitions budget, offset by CB & IDEA balances
 2. FY19 – “Turned-back” \$114,921 at the close of FY19
 3. FY20 – Reduced \$204,523 in out-of-district tuitions budget, offset by CB & IDEA balances
 4. FY21 – Reducing FY21 Budget in out-of-district tuition lines by \$1.7M, to be offset by anticipated CB & IDEA FY20 ending balances

1. Using FY20 to Inform FY21

2. FY20 operations are on track to meet existing needs within the budget
3. Continued external pressure points inform the FY21 Budget:
 1. Increased enrollment
 2. Increased class size
 3. Space needs
 4. Health Insurance
 5. Transition to grade reconfiguration

2. Recognition of Enrollment and Class Size Issues

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1. Overall Enrollment Trend

Enrollment – District Wide Aggregate Increase over 8 Year Period

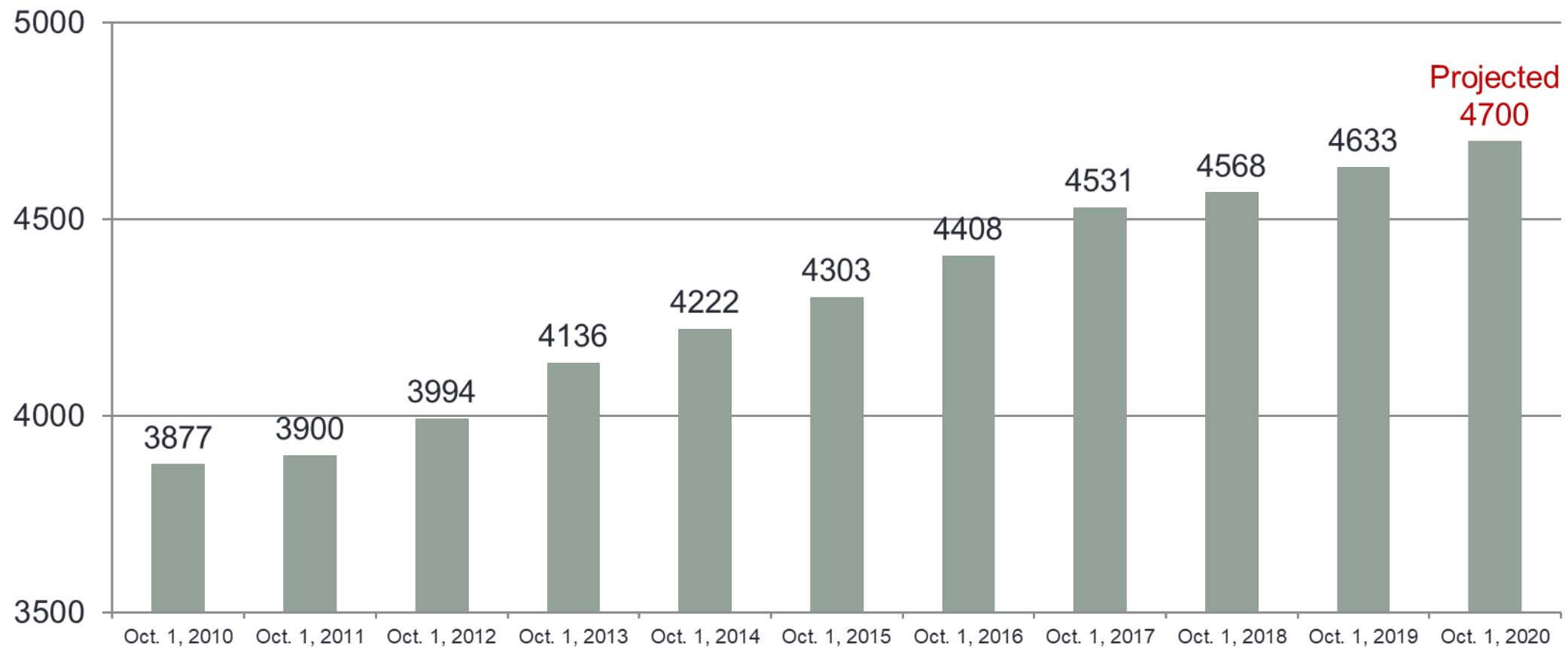
	Oct. 1, 2011	Oct. 1, 2012	Oct. 1, 2013	Oct. 1, 2014	Oct. 1, 2015	Oct. 1 2016	Oct. 1 2017	Oct. 1 2018	Oct. 1, 2019	Oct. 1, 2020
BPS K-12 Enrollment	3900	3994	4136	4222	4303	4408	4531	4568	4633	*4700
		94	142	86	81	105	123	37	65	
					<i>Increase, 2011 to 2019:</i>				733	

*This does not include our OOD or Pre-school students.

BPS enrollment of all students (including PreK and OOD) = 4,795

2. Recognition of Enrollment and Class Size Issues

BPS K-12 Enrollment From October 1, 2010 to October 1, 2019



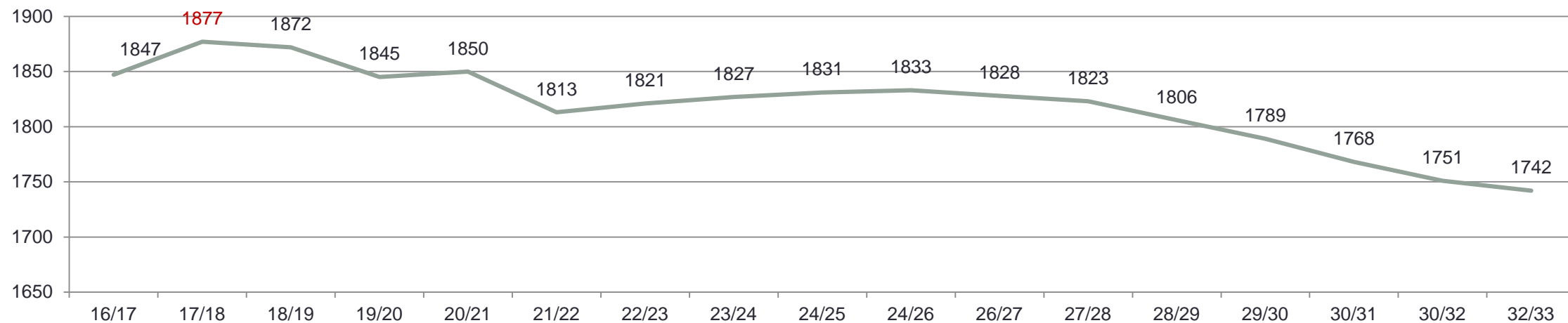
2. Recognition of Enrollment and Class Size Issues

3. Enrollment Projections

Elementary School 9 Year Enrollment Forecast

Year	<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>	<u>25/26</u>	<u>26/27</u>	<u>27/28</u>	<u>28/29</u>	<u>29/30</u>	<u>30/31</u>	<u>31/32</u>	<u>32/33</u>
Enroll	1847	1877	1872	1845	1850	1813	1821	1827	1831	1833	1828	1823	1806	1789	1768	1751	1742
# change	50	30	-5	-27	5	-37	8	6	4	2	-5	-5	-17	-17	-21	-17	-9
% change	2.78%	1.62%	-0.27%	-1.44%	0.27%	-2.00%	0.44%	0.33%	0.22%	0.11%	-0.27%	-0.27%	-0.93%	-0.94%	-1.17%	-0.96%	-0.51%

Elementary Enrollment Projection 2016/17-2032/33

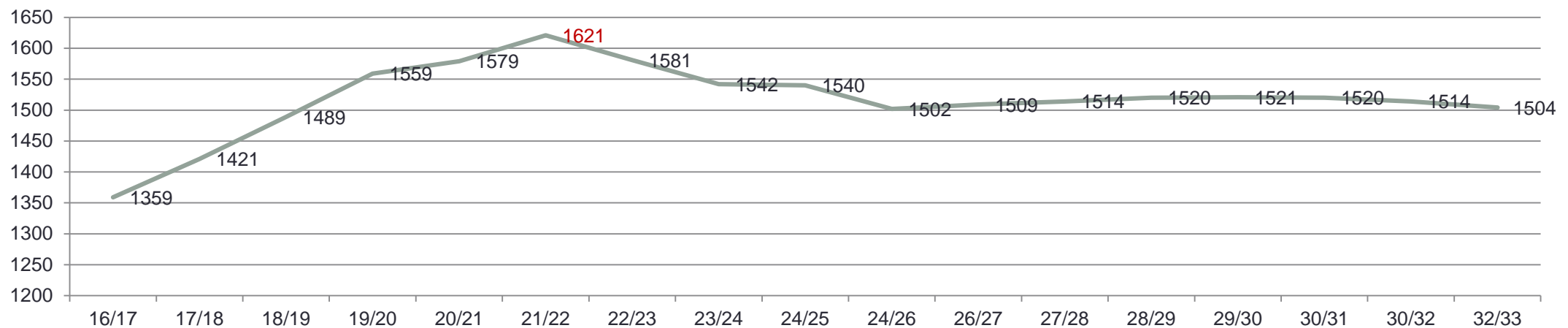


2. Recognition of Enrollment and Class Size Issues

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>	<u>25/26</u>	<u>26/27</u>	<u>27/28</u>	<u>28/29</u>	<u>29/30</u>	<u>30/31</u>	<u>31/32</u>	<u>32/33</u>
Enroll	1359	1421	1489	1559	1579	1621	1581	1542	1540	1502	1509	1514	1520	1521	1520	1514	1504
# change	36	62	68	70	20	42	-40	-39	-2	-38	7	5	6	1	-1	-6	-10
% change	2.72%	4.56%	4.79%	4.70%	1.28%	2.66%	-2.47%	-2.47%	-0.13%	-2.47%	0.47%	0.33%	0.40%	0.07%	-0.07%	-0.39%	-0.66%

**CMS Enrollment Projection
2016/17-2032/33**

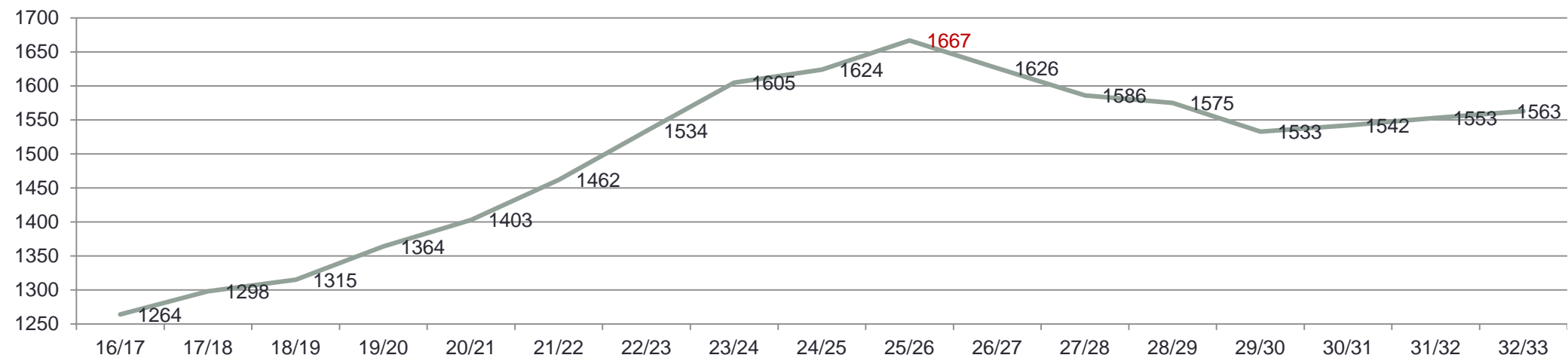


2. Recognition of Enrollment and Class Size Issues

Belmont High School 9 Year Enrollment Forecast

Year	<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>	<u>25/26</u>	<u>26/27</u>	<u>27/28</u>	<u>28/29</u>	<u>29/30</u>	<u>30/31</u>	<u>31/32</u>	<u>32/33</u>
Enroll	1264	1298	1315	1364	1403	1462	1534	1605	1624	1667	1626	1586	1575	1533	1542	1553	1563
# change	18	34	17	49	39	59	72	71	19	43	-41	-40	-11	-42	9	11	10
% change	1.44%	2.69%	1.31%	3.73%	2.86%	4.21%	4.92%	4.63%	1.18%	2.65%	-2.46%	-2.46%	-0.69%	-2.67%	0.59%	0.71%	0.64%

**BHS Enrollment Projection
2016/17-2032/33**



2. Recognition of Enrollment and Class Size Issues

4. Enrollment Subcategories

Student Services Enrollment

Two subcategories of students that we monitor for an increase in enrollment are:

1. Students who are non-English speaking (ELs)
2. Students on IEPs who receive their services through out of district schools (OOD)

2. Recognition of Enrollment and Class Size Issues

EL Population Increase K-12 From Oct. 1, 2010 to Oct. 1, 2019

Date	Total EL Population	Change from Previous Year	% Change
Oct. 1, 2010	118		
Oct. 1, 2011	114	-4	-3%
Oct. 1, 2012	117	3	3%
Oct. 1, 2013	180	63	54%
Oct. 1, 2014	233	53	29%
Oct. 1, 2015	261	28	12%
Oct. 1, 2016	281	20	8%
Oct. 1, 2017	340	59	21%
Oct. 1, 2018	369	29	9%
Oct. 1, 2019	404	35	9%

2. Recognition of Enrollment and Class Size Issues

EL Population as a Percent of Total Enrollment K-12 From Oct. 1, 2010 to Oct. 1, 2019

Date	Total Enrollment	Total EL Population	% of Total
Oct. 1, 2010	3877	118	3.0%
Oct. 1, 2011	3900	114	2.9%
Oct. 1, 2012	3994	117	2.9%
Oct. 1, 2013	4136	180	4.4%
Oct. 1, 2014	4222	233	5.5%
Oct. 1, 2015	4303	261	6.1%
Oct. 1, 2016	4408	281	6.4%
Oct. 1, 2017	4531	340	7.5%
Oct. 1, 2018	4568	369	8.1%
Oct. 1, 2019	4633	404	8.7%

2. Recognition of Enrollment and Class Size Issues

Out of District Students

1. Current Enrollment (September through January)
2. 2018-19 Monthly Enrollment
3. Multi-Year Historical Trend

2. Recognition of Enrollment and Class Size Issues

2019 - 2020 Monthly OOD Student Placements

Type	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
LABBB-served in Belmont	19	19	19	19	19					
LABBB-served elsewhere	26	26	25	25	25					
Collaborative	11	11	11	11	11					
Mass Public Schools	1	2	2	2	2					
Private Placements	36	38	37	38	39					
Total	93	96	94	95	96					

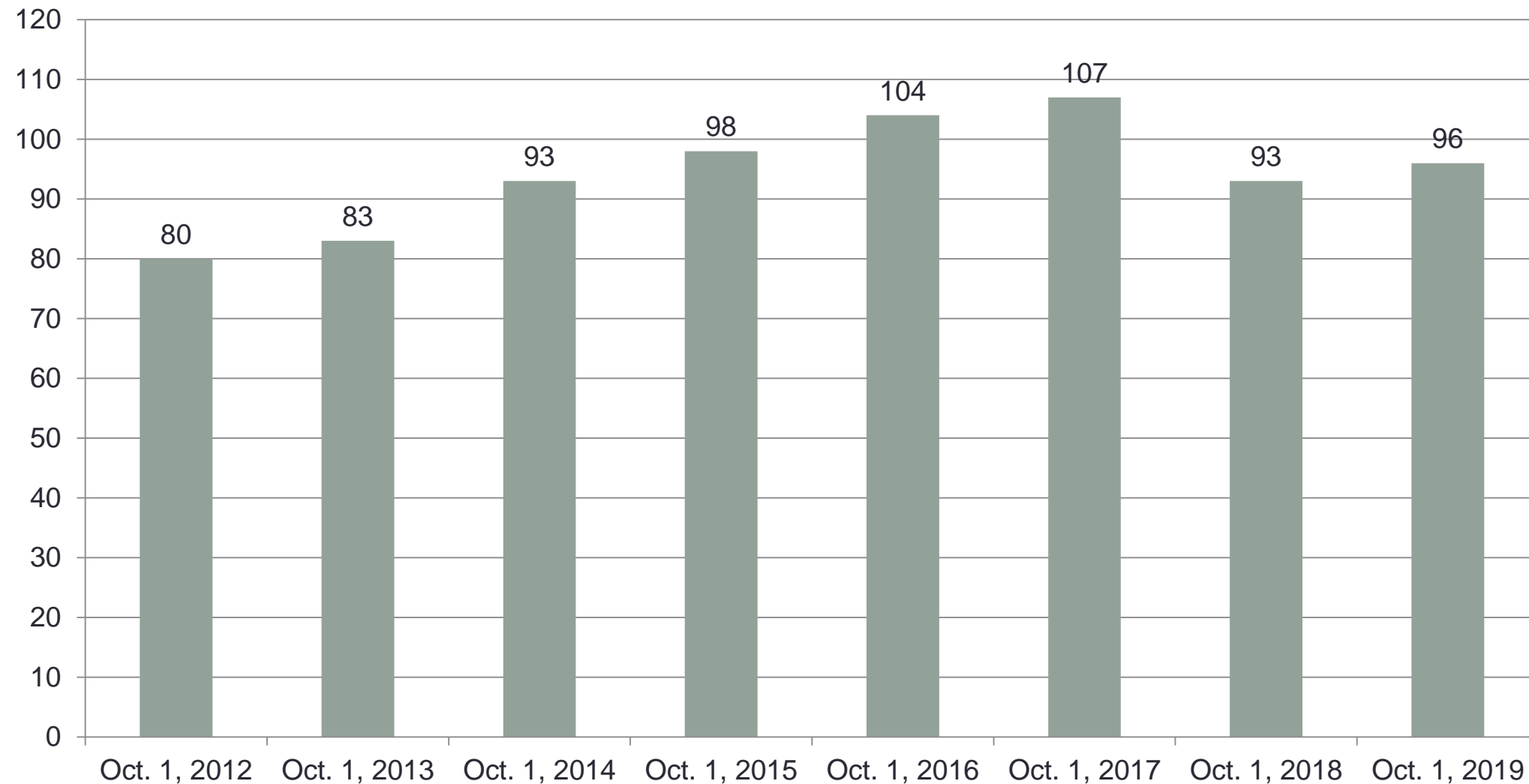
2. Recognition of Enrollment and Class Size Issues

2018 - 2019 Monthly OOD Student Placements

Type	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
LABBB-served in Belmont	20	20	20	20	21	21	21	21	21	21
LABBB-served elsewhere	27	26	26	26	27	27	27	27	27	29
Collaborative	8	8	8	8	8	8	8	8	8	8
Mass Public Schools	2	2	2	2	2	2	2	2	2	2
Private Placements	37	37	35	34	36	37	37	36	36	36
Total	94	93	91	90	94	95	95	94	94	96

2. Recognition of Enrollment and Class Size Issues

OOD Student Placements From Oct. 1, 2012 to Oct. 1, 2019



3. FY21 Budget Planning

3. Budget Planning

1. Primary Cost Drivers

1. Strategic Plan Based Cost Drivers

1. Student enrollment has increased each year for the past decade
2. Increased enrollment is expected to continue through the 2025-2026 School Year
3. Consistently increasing enrollment for multiple years has resulted in the need for:
 1. Addition of professional and support staff
 2. Increase in supports for services for mandated costs (Special Education and English Learners)
 3. Maintain level of purchases texts/materials/supplies, technology, equipment, furniture, transportation, and support of extracurricular activities

3. Budget Planning

1. Primary Cost Drivers

2. External Cost Drivers

1. Health insurance premiums increasing by 4% for FY21 (increases held at 4% due to increases in plan changes for School and Town employees)
2. Special Education:
 1. An additional \$1,700,00 in out-of-district tuition costs will be charged to CB & IDEA funds expected to be carried over from FY20 to FY21
 1. Done to support the overall Town Budget
 2. One-time additional offset which is made possible by favorable CB and IDEA allocations in FY20
 3. Offset will need to be replenished in the School Department FY22 General Fund Budget
 2. Transportation and contracted services are budgeted at the Task Force index factor of a 7% increase over the FY20 Budget

3. Budget Planning

2. Financial Highlights

1. The FY21 School Department Budget includes:
2. Amounts rolled-forward from our existing operations, plus
3. Additional necessary costs to address strategic plan goals (primarily continued, sustained increasing enrollment), and
4. Additional necessary costs for external cost drivers (i.e. Town-wide health insurance rates and Special Education costs)

3. Budget Planning

Roll-forward amounts – 3.58% increase over the FY20 Budget

Budget Category	FY20 General Fund Budget	FY21 Roll- Forward Budget	Change	% Change
Staff	41,210,048	43,241,141	2,031,093	4.93%
Texts, Supplies, Materials, Equipment, Other	2,218,714	2,274,182	55,468	2.50%
Busing	421,440	462,556	41,116	9.76%
Fringe	8,921,328	8,962,828	41,500	0.47%
Special Education Tuition, Transportation, Contract Services	7,877,921	7,877,921	0	0.00%
Totals	60,649,451	62,818,628	2,169,177	3.58%

3. Budget Planning

Strategic plan-based costs drivers – Additional 0.80% increase over FY20 Budget

	Change for FY21 Budget
1. Positions/enrollment - 5.80 FTEs <ul style="list-style-type: none"> ● 2.00 Half-Teaching Team for Grade 6 ● 2.00 Half-Teaching Team for Grade 7 ● 1.00 High School Science Teacher ● 0.40 High School World Language Teacher ● 0.40 High School Social Studies Teacher 	400,000
2. Adding another school bus (for a new total of 10)	33,917
3. Health insurance for new positions	50,200
Total Strategic Plan-Based Cost Drivers	484,117

3. Budget Planning

External cost drivers – Additional 1.31% decrease over FY20 Budget

	Change for FY21 Budget
1. Health insurance rate increase for all Town Departments - 4%	357,773
2. Special Education Tuitions – One-time reduction of 1,700,000 to support overall Town budget; made possible by anticipated FY20 ending CB & IDEA balances (1,700,000 reduction applied after 7% index to FY20 base)	-1,331,347
3. Special Education Transportation – 7% using Town Financial Task Force model	96,770
4. Special Education Contract Services – 7% using Town Financial Task Force model	80,500
Total External Cost Drivers	-796,304

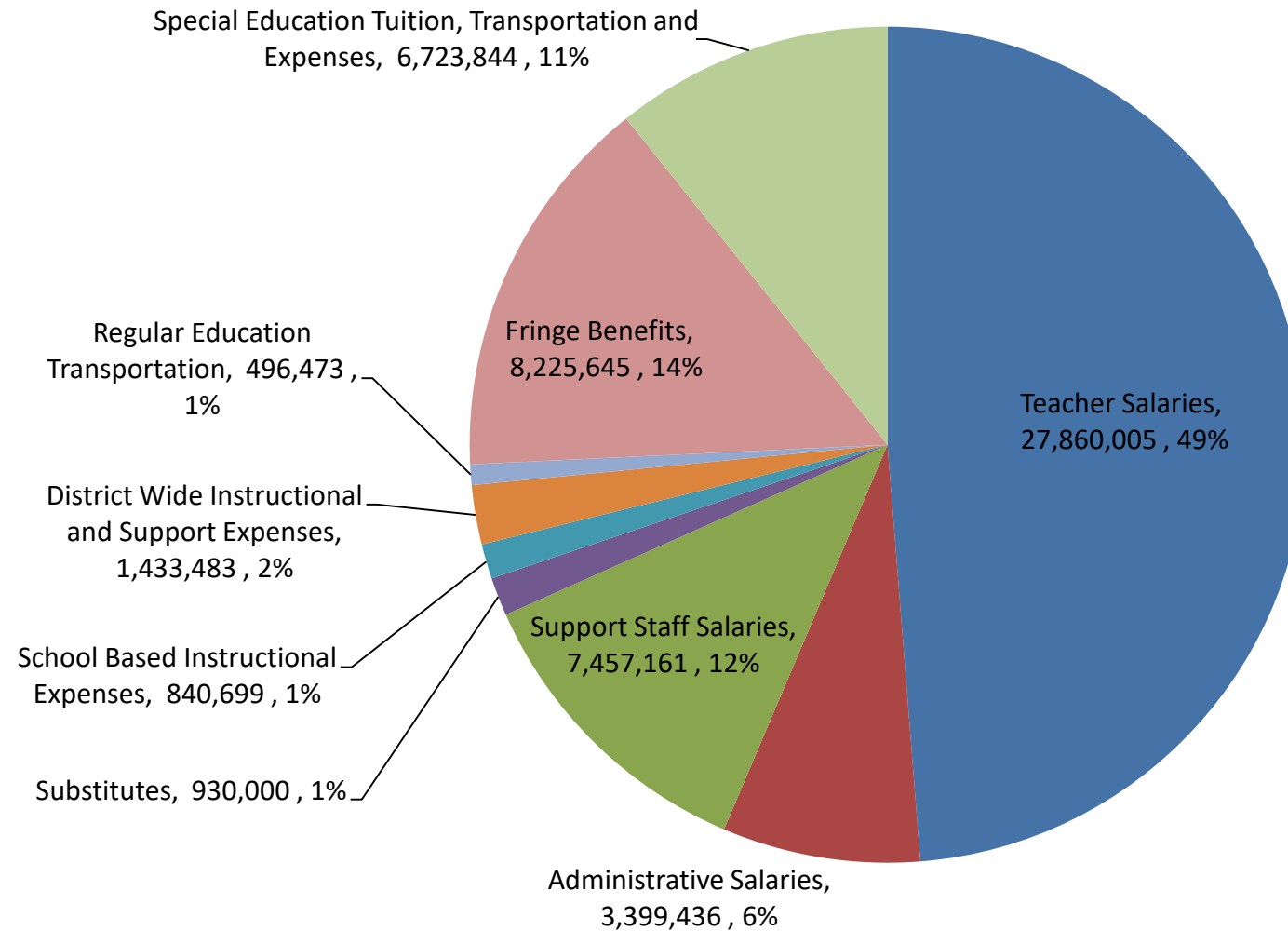
3. Budget Planning

FY21 Total General Fund Budget: Roll-forward amounts plus strategic-plan cost drivers and other cost drivers – 3.06% increase over FY20 Budget

Budget Category	FY20 General Fund Budget	FY21 Roll-Forward Budget	Strategic Plan Cost Drivers	External Cost Drivers	Total FY21 General Fund Budget	Change FY20 to FY21	% Change
Staff	41,210,048	43,241,141	400,000		43,641,141	2,431,093	5.90%
Texts, Supplies, Materials, Equipment, Other	2,218,714	2,274,182	0		2,274,182	55,468	2.50%
Busing	421,440	462,556	33,917		496,473	75,033	17.80%
Fringe	8,921,328	8,962,828	50,200	357,773	9,370,801	449,473	5.04%
Special Education Tuition, Transportation, Contract Services	7,877,921	7,877,921		-1,154,077	6,723,844	-1,154,077	-14.65%
Total FY21 General Fund Budget	60,649,451	62,818,628	484,117	-796,304	62,506,441	1,856,990	3.06%
% Change over FY20 Budget		3.58%	0.80%	-1.31%	3.06%		

3. Budget Planning

FY21 General Fund Budget Dollar Amount and % of Total by Category Total General Fund Budget of \$62,506,441



3. Budget Planning

3. Technical Budget Assumptions

1. School General Fund Budget for FY21 is \$62,506,441.
2. Five-Year Staff Plan developed to address enrollment, in conjunction with the District Configuration Education Plan.
 1. Phase 1 of this plan calls for an additional 15.00 FTEs
 2. Based on funding, 5.80 FTEs are included in the FY21 Budget
3. Health insurance premiums are budgeted to increase by 4% over FY20 rates (Town-wide)

3. Budget Planning

4. Special Education – Tuitions: An additional \$1,700,00 will be charged to CB & IDEA funds expected to be carried over from FY20 to FY21
 1. Additional offset is done as a one-time measure to support the overall Town budget
 2. Additional offset is only possible due to favorable CB & IDEA allocations in FY20
 3. Offset will need to be replenished in the School Department FY22 General Fund Budget
5. Special Education - Transportation and Contract Services: Budgeted at the FTF index factor of 7% over FY20
6. Federal grants budgeted in FY21 as level funded from FY20 plus contractual increases for staff allocated to grants
7. User fees will remain the same for FY21
8. State Circuit Breaker and IDEA allocations will continue to be used strategically, in accordance with the district's Multi-Year Out-of-District Funding Plan.

3. Budget Planning

Five Year Staffing Plan, Phase 1 – FY21 (Positions Prioritized)

Level	FTE	Position	Category	Category Description
Middle School	2.00	1/2 Team - Grade 6	E	Enrollment
Middle School	2.00	1/2 Team - Grade 7	E	Enrollment
High School	1.00	Science Teacher	E	Enrollment
High School	0.40	World Language Teacher	E	Enrollment
High School	0.40	Social Studies	E	Enrollment
High School	1.00	Social Worker	S	Social-emotional/clinical
District-wide	1.00	Nurse	E, M	Enrollment, Mandated
District-wide	1.00	ELL Teacher	E, M	Enrollment, Mandated
Middle School	1.00	Encore Teacher	E	Enrollment
Elementary	2.00	Math Coach	A	Achievement
Elementary	2.00	SPED Chair	A, E, M	Achievement, Enrollment, Mandated
Elementary	1.00	METCO Elementary Coordinator	A	Achievement
High School	0.20	Chorus	E	Enrollment

Total Phase 1 FTEs 15.00

FY21 Total 5.80

3. Budget Planning

Unknown Variables

1. Further increases in student enrollment that may result in additional costs, especially in the areas of EL, Sped, space needs
2. Increases or decreases in State and Federal Grants (METCO, Circuit Breaker Reimbursement, IDEA, Title I, Title IIA, etc.) have not yet been determined for FY21
3. Impact of overall decrease in Out-of-District (OOD) funding available
4. New LABBB credit process
5. Ch. 70 process & dollar amount: Current Ch. 70 guidance (Governor's Budget) for FY21 is \$338,163 less than the amount budgeted for FY21

Next Steps

1. This is the Draft 1 FY21 Budget to be reviewed and considered by the School Committee.
2. The FY21 School Department Budget will be presented at a joint meeting of the School Committee, the Select Board, the Warrant Committee and the Capital Budget Committee on 2/10/20.
3. There will be further discussion on the FY21 Budget at upcoming Finance Sub Committee meetings and School Committee meetings.