

BUDGET OVERVIEW

The School Department is grateful to have benefited from the increase in funding, as a result of the Proposition 2 ½ Override passed by the Town of Belmont in April 2015. This needed increase in funding supported several lines in our budget including: increases in teaching and professional positions (between FY16 and FY19), funds for increasing enrollment, Students Services, Out-of-District Tuitions, and Special Education Transportation.

This increase in funding for FY16 - FY19 put the district in the position to fully realize budget lines that supported teaching and learning, including the purchases of texts, materials and supplies that had been historically frozen and reduced mid-year.

As we use our FY19 budget to inform our FY20 budget planning, the district continued to utilize a zero-based budgeting process with each school and department, which was initiated for the FY17 budget. This process required every department director and school principal to meet with the Central Office administration to justify each salary and non-salary budget line amount for FY20.

The purpose of these meetings, and the budgeting goal of the district, is to allocate our funds toward the priorities of the School Department's Strategic Plan. The Financial Highlights section of this document shows the allocation of funds among major cost centers of the budget, which represent the district's priorities.

In FY18 the district implemented Year Three of the Three-Year Fiscal Plan by adding five FTEs to support student enrollment and class size. The district has also been able to continue to provide the budgeted funds to each department head and principal for their on-going needs for texts, materials and supplies. In an attempt to support the overall Town Budget, the district utilized State Circuit Breaker funds to offset a larger portion of the General Fund allocation for out-of-district tuitions. This one-time offset was only possible due to favorable State Circuit Breaker allocations in FY17.

For FY19, the Space Task Force was reactivated to explore the challenges of class size and high enrollment at the elementary level. Based on the work of the Space Task Force and the School Department, the Capital Budget Committee and Town Meeting approved the purchase of four modular classrooms located at the Burbank Elementary School. Over the course of three years, the district will have increased by over 21 additional classroom spaces district-wide to address the continued increase in enrollment.

In FY19 the district added nine FTEs to support student enrollment and class size. Additionally, during FY19, the community and Town Meeting voted to approve funding for a 7-12 Belmont High School Building Project. The School Department is thankful and appreciative for the opportunity to address the multi-year trend of increasing student enrollment through a meaningful and long-term solution. The district commissioned demographers, McKibben Associates, to update its enrollment projections for the next several years. These projections confirmed the current upward trend will continue and the district will reach a "new normal" of approximately 5,000 students.

The work of the School Department in FY19, FY20 and beyond will focus on the plan for the reconfiguration of grade levels in conjunction with the Belmont High School Building Project. The district is taking a comprehensive view of this work as it pertains to staffing, curriculum and instruction, and operations. In response to this need, the district has drafted the District Configuration Education Plan, which may be viewed on the Belmont Public Schools website via the link listed below.

In conclusion, for FY20 the School Department will utilize its Strategic Plan to guide and prioritize the allocation of its budget dollars. We continue to implement the sound fiscal practices incorporated into the Town's Fiscal Plan including a zero based budgeting process to ensure that every dollar is expended with efficiency and effectiveness; and indexing costs as informed by the inflationary factors identified during the development of the Town's Plan. School Department funds will be allocated toward the goal of providing our students, staff, families, and community the best educational experience that the Town of Belmont expects and deserves.

Respectfully submitted,

John P. Phelan
Superintendent

- Note: This Executive Summary is supported by the Belmont Public Schools FY20 Draft 1 Budget Presentation document, presented to the School Committee on 2/26/19, found at <http://www.belmont.k12.ma.us/bps/Administration/School-Budget>
- Line item detail for the FY20 Budget can be found at <http://www.belmont.k12.ma.us/bps/Administration/School-Budget>
- District Configuration Education Plan may be found here: <https://www.belmont.k12.ma.us/bps/Committee/Public-Documents/Article/2191/February-5-2019-School-Committee-Documents>

BELMONT PUBLIC SCHOOLS STRATEGIC PLAN 2018-2019

MISSION STATEMENT

With a commitment to teaching and learning, the Belmont Public Schools strive to nurture the knowledge, skills, and emotional development of each student in order to create a community of engaged learners who contribute to the common good and are of service to others.

CORE BELIEFS

We believe that

All students are capable of learning at high levels.

Everyone deserves to learn in a safe and supported learning environment in which all members of the school community demonstrate respect for each other.

Successful students and educators need 21st century skills, including the ability to solve problems, communicate effectively, collaborate, and think critically.

A sense of community is essential for the development of every learner.

Education for the whole child requires development of the child's academic, social, physical, and emotional well-being.

Education is best achieved when students, teachers, and parents work together.

Students will work and live in a world very different from the one in which they, their teachers, and their parents grew up.

Student success is measured in a variety of ways.

Public education is the primary means society has for safeguarding democracy and achieving social justice.

VISION STATEMENT

The Belmont Public Schools provide an innovative environment where all adults and children develop and apply the curiosity, skills, and habits of life-long learners. Our success is built on a partnership of educators, families, and community members that is committed to providing the means for Belmont's children to create happy and successful lives.

All students in the Belmont Public Schools will

- Learn: Develop the confidence and resilience that result from exceptional effort;
- Think: Authentically engage in a rigorous curriculum;
- Create: Apply their learning to address important challenges;
- Serve: Make a positive difference in the lives of other people.

MOTTO

Learn * Think * Create * Serve

BELMONT PUBLIC SCHOOLS STRATEGIC PLAN 2018-2019 (Continued)

| | Strategic Goals | Key Initiatives for 2018-2019 |
|----|--|---|
| A. | <p><i>To prepare all students for college, career, and life-long learning through</i></p> <ul style="list-style-type: none"> • a balanced and healthy school experience, • continuity of curricula aligned with Commonwealth and community standards, • support for educators to experiment and innovate, and • clear articulation of instructional models. | <p><u>Focus Areas:</u> A1. Implement short term plans and develop long term vision to address student achievement gaps. A2. Continue district-wide implementation of Social Emotional Learning framework.</p> <p><u>Ongoing Operational Work:</u> A3. Align Belmont curriculum to new state frameworks for science. A4. Improve the use of common assessment data at middle and high schools. A5. Continue district-wide implementation of state model for English language learners.</p> |
| B. | <p><i>To support continuous improvement and overall programmatic and fiscal stability by</i></p> <ul style="list-style-type: none"> • engaging administrators, teachers, students, and community stakeholders in generally accepted practices of long-term strategic planning. | <p><u>Focus Areas:</u> B1. Collaborate with the Massachusetts School Building Authority, the BHS Building Committee, Building Team (Architect & Owner’s Project Manager), and BPS and Belmont community members to address short and long term enrollment and space needs through the Building Project (gr. 7-12, 8-12, or 9-12) and the installation of modular classrooms at the Burbank School. This work includes developing a district vision for the future of teaching and learning for the next Strategic Plan (2018-2023).</p> <p><u>Ongoing Operational Work:</u> B2. Continue to implement short plans to address increasing enrollment including space, staff, and resources. B3. Define current special education programs and service-delivery models and develop plans to improve in-district capacity to meet a variety of special education needs. B4. Develop, communicate, quantify, and incorporate into the budget an annual plan for preventative maintenance of school facilities. B5. Continue to develop a fiscal management plan for texts, materials, supplies, furniture, technology, and substitutes. B6. Establish consistent safety protocols, provide training, and practice them in all schools. B7. Implement the Technology Plan for technology infrastructure and integration in support of teaching and learning. B8. Review and respond to NEASC findings at BHS.</p> |
| C. | <p><i>To ensure that students receive instruction from consistently highly qualified educators who pursue continuous improvement of their art by</i></p> <ul style="list-style-type: none"> • hiring well-prepared and diverse professionals, • sustaining continuous professional development by means of clear and coherent plans, and • implementing a successful educator evaluation system in line with new Commonwealth standards. | <p><u>Ongoing Operational Work:</u> C1. Continue to expand professional personnel recruitment to increase the diversity of the applicant pool. C2. Develop a sustainable substitute system.</p> |

FY20 SCHOOL DEPARTMENT INITIATIVES, GUIDED BY BELMONT PUBLIC SCHOOLS STRATEGIC PLAN

- To support the Strategic Plan of the Belmont Public Schools.
- To continue the district-wide professional development for staff on Social Emotional Learning, to support the outcomes of the Achievement Gap Task Force. (A1, A2)
- Continuation of the Three Year Budget Plan of the Financial Task Force Committee's work in budgeting to address class size issues, to engage students in educationally beneficial programming. (B)
- Continued review of class sizes and control of elementary assignments with planning for projected enrollment increases. (B2)
- To increase teaching and learning spaces throughout the district by implementing the recommendations of the Space Task Force. (B1, B2)
- Continue to monitor and analyze the deployment of Student Services funding in the FY20 budget to address mandated costs; simultaneously review and improve the budget tracking systems in these areas. (B3)
- Expansion of classroom technology instructional models (1:1 for all students in grades 9, 10, 11, and 12 at BHS). (B7)
- Professional development focus areas pre-K-12: Curriculum and assessment development and review; Technology tools and applications to improve instruction; Teaching English Language Learners, Development of critical thinking skills; Social emotional learning to improve the district's capacity to engage and support all learners. (A2, A5, B3)
- Development of a prioritized multi-year plan for textbook (and ebook) adoption in all curriculum areas. (B5)

FY20 BUDGET OBJECTIVES

- Align FY20 budget to the priorities of the district strategic plan.
- Maintain rigorous and high quality of instruction and student engagement for all students.
- Maintain the staffing levels commensurate to the increase in enrollment needed to maintain the existing quality of educational services to our students.

- Maintain the well-rounded education comprised of rigorous academics, strong performing arts, and high participation in athletics, extra-curricular experiences, and community service.
- Meet existing contractual commitments.
- Maintain and support the continuous improvement of our staff through professional development.
- To the extent possible, address increasing class sizes and program offerings.
- Maintain existing facilities and avoid deferred maintenance.
- Maintain competitive compensation to attract and retain high quality teachers and administrators.
- Meet the space challenges presented by continued increased enrollment.
- Continue the transition of grade reconfigurations in conjunction with the 7-12 High School Building Project, including: staffing, curriculum and instruction, and operations.

PRIMARY COST DRIVERS

- Strategic Plan Based Cost Drivers
 - Student enrollment has increased by approximately 100 students each year for the past five years.
 - Increased enrollment is expected to continue through the next several years.
 - Consistently increasing enrollment for multiple years has resulted in the need for:
 - Addition of professional and support staff.
 - Increase in supports for services for mandated costs (Special Education and English Language Learners).
 - Maintain level of purchases texts/materials/supplies, technology, equipment, furniture.

- External Cost Drivers
 - Health insurance premiums increasing by 8% for FY20.
 - Special Education
 - The Town Financial Task Force Model identified the need to index Special Education tuition, transportation and contract services at a rate of 7% annually.
 - For FY20, Special Education out-of-district tuitions are budgeted at an increase of 3% over the FY19 Budget. An additional 4% of out-of-district costs will be charged to State Circuit Breaker carry over funds allocated to the district in FY19.
 - This is a one-time additional offset which is made possible by favorable State Circuit Breaker allocations in FY18 and FY19.
 - For Special Education contracted services, based on a review of the historical expense trend, the district is budgeting a net decrease from FY19 to FY20 of approximately \$43,000.
 - This is also a one-time adjustment which will need to be reviewed when developing the FY21 Budget.
 - Special Education transportation costs will be budgeted at the Task Force index factor of a 7% increase over the FY19 Budget.

UNKNOWN VARIABLES

- Further increases in student enrollment, and the cost of the corresponding additional student supports needed, especially in the areas of ELL, Special Education and space needs.
- Increases or decreases in State and Federal Grants (METCO, Circuit Breaker Reimbursement, IDEA, Title I, Title IIA, etc.) have not been finalized for FY20.

**FY20 BUDGET
FINANCIAL HIGHLIGHTS**

The FY20 School Department Budget includes amounts rolled-forward from our existing operations; plus additional necessary costs to address strategic plan goals (primarily continued, sustained increasing enrollment), and additional necessary costs for other cost drivers (i.e. Town-wide health insurance rates and Special Education costs):

- **Roll-forward amounts - 3.51% increase over the FY19 Budget**

| Budget Category | FY19 General Fund Budget | FY20 Roll- Forward Budget | Change | % Change |
|--|-----------------------------------|---------------------------------|------------------|--------------|
| Staff | 38,712,737 | 40,591,025 | 1,878,288 | 4.85% |
| Texts, Supplies, Materials, Equipment, Other | 2,030,318 | 2,070,813 | 40,495 | 1.99% |
| Busing | 339,000 | 347,640 | 8,640 | 2.55% |
| Fringe | 8,225,645 | 8,295,637 | 69,992 | 0.85% |
| Special Education Tuition, Transportation, Contract Services | 7,677,892 | 7,677,892 | 0 | 0.00% |
| Totals | 56,985,592 | 58,983,008 | 1,997,416 | 3.51% |

- **Additional due to costs drivers**
 - Strategic Plan-based Costs Drivers – Additional 1.55% increase over the FY19 Budget

| | Change for FY20 Budget |
|--|-----------------------------------|
| 1. <u>Positions/enrollment - 3.60 FTEs</u> <ul style="list-style-type: none"> • 1.40 Elementary Guidance Counselors • 0.40 Middle School Foreign Language Teacher • 0.40 High School Teachers • 0.40 High School Assistant Principal • 1.00 District-Wide English Language Learner Program Director | 298,673 |
| 2. Charging a greater portion of existing stipends to the general fund instead of fees | 320,350 |
| 3. Texts, materials, supplies - Increase due to enrollment | 74,877 |
| 4. Relocation for Athletics during BHS Construction | 73,024 |
| 5. Adding another school bus (for a new total of 9) | 73,800 |
| 6. Health insurance for new positions | 39,800 |
| Total Strategic Plan-Based Cost Drivers | 880,524 |

○ External Cost Drivers – Additional 1.38% increase over the FY19 Budget

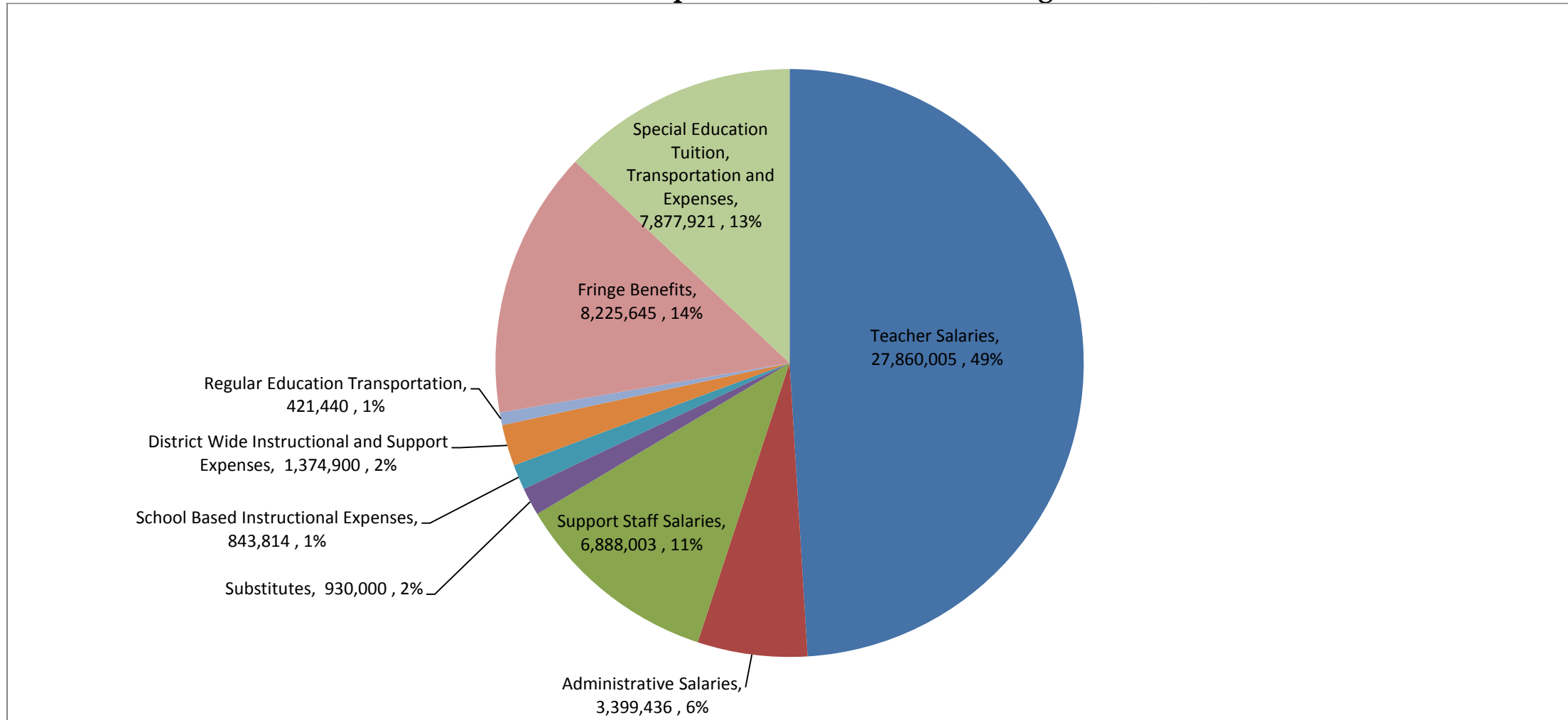
| | Change for FY20 Budget |
|---|-----------------------------------|
| 1. Health insurance rate increase for all Town Departments - 8% | 585,891 |
| 2. Special Education Tuitions – 3%, based on CB balance, as a one-time adjustment to the 7% Town Financial Task Force model | 153,393 |
| 3. Special Education Transportation – 7% using Town Financial Task Force model | 90,440 |
| 4. Special Education Contract Services – Reduction from FY19, based on expense trend analysis, as a one-time adjustment to the 7% Town Financial Task Force model | -43,804 |
| Total External Cost Drivers | 785,919 |

FY20 Total General Fund Budget: Roll-forward amounts plus strategic-plan cost drivers and other cost drivers – 6.43% increase over FY19 Budget

| Budget Category | FY19 General Fund Budget | FY20 Roll-Forward Budget | Strategic Plan Cost Drivers | External Cost Drivers | Total FY20 General Fund Budget | Change FY19 to FY20 | % Change |
|--|--------------------------|--------------------------|-----------------------------|-----------------------|--------------------------------|---------------------|--------------|
| Staff | 38,712,737 | 40,591,025 | 619,023 | | 41,210,048 | 2,497,311 | 6.45% |
| Texts, Supplies, Materials, Equipment, Other | 2,030,318 | 2,070,813 | 147,901 | | 2,218,714 | 188,396 | 9.28% |
| Busing | 339,000 | 347,640 | 73,800 | | 421,440 | 82,440 | 24.32% |
| Fringe | 8,225,645 | 8,295,637 | 39,800 | 585,891 | 8,921,328 | 695,683 | 8.46% |
| Special Education Tuition, Transportation, Contract Services | 7,677,892 | 7,677,892 | | 200,029 | 7,877,921 | 200,029 | 2.61% |
| Total FY20 General Fund Budget | 56,985,592 | 58,983,007 | 880,524 | 785,919 | 60,649,451 | 3,663,859 | 6.43% |
| % Change over FY19 Budget | | 3.51% | 1.55% | 1.38% | 6.43% | | |

FY20 Belmont Public Schools General Fund Budget

Dollar Amount and % of Total by Category
Total FY20 School Department General Fund Budget is \$60,649,451



TECHNICAL BUDGET ASSUMPTIONS

- School General Fund Budget for FY20 is \$60,649,451.
- Roll forward all existing positions; and add 3.6 FTEs as provided to address continued increasing enrollment.
- Health insurance premiums are budgeted to increase by 8% over FY19 rates (Town-wide).
- Special Education:
 - Special Education out-of-district tuition General Fund budget is a 3% increase over the FY19 General Fund Budget; with additional costs to be charged to State Circuit Breaker funds allocated to the district in FY19. This is a one-time adjustment based on favorable State Circuit Breaker allocations in FY18 and FY19.
 - Special Education transportation is budgeted at the Town Financial Task Force index factor of 7% over the FY19 Budget.
 - Special Education contract services are budgeted at a decrease of approximately \$43,000 below the FY19 Budget, based on a review of the historical cost trend. This is a one-time adjustment which will be reviewed during the development of the FY21 Budget.
- Federal grants budgeted in FY20 as level funded from FY19 plus contractual increases for staff allocated to grants.
- User fees will remain the same for FY20.
- State Circuit Breaker allocations will continue to be used strategically, in accordance with the School Department's multi-year plan.
- Full Day Kindergarten revolving funds will continue to offset a portion of Kindergarten teacher and aide salaries.
- School Building Rental revolving funds will continue to be utilized to support the maintenance and repairs of school facilities.