

## 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 FY20), funds for increasing enrollment, Students Services, Out-of-District Tuitions, and Special Education Transportation.

This increase in funding for FY16 – FY20 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.

The 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.

The development of the FY21 Budget has also been informed by the School Department’s participation in the Town Financial Task Force 2 (FTF 2). The goal of the Task Force is to help ensure the long-term fiscal sustainability of Town and School operations – which is in concert with the district’s Strategic Plan. In support of the overall Town Budget, for FY21 the district is budgeting to charge a larger portion of its Out-of-District Tuition costs to allocations from State Circuit Breaker funds and Federal Individuals with Disabilities Act (IDEA) Grant funds to offset costs otherwise charged to the General Fund allocation. This increased reliance on external funding sources is a one-time offset and is only possible due to favorable allocations from these funding sources in FY20.

During FY19, the community and Town Meeting voted to approve funding for a 7-12 Belmont Middle 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 FY21 and beyond will focus on the plan for the reconfiguration of grade levels in conjunction with the Belmont Middle 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. The FY21 Budget reflects the additional positions in order to continue to make incremental gains, commensurate with the long-term growth trend we are experiencing.

In conclusion, for FY21 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 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 FY21 Draft 1 Budget Presentation document, presented to the School Committee on 2/4/20, found at <http://www.belmont.k12.ma.us/bps/Administration/School-Budget>
- Line item detail for the FY21 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 2020-2021

### 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 2020-2021 (Continued)**

	<b>Strategic Goals</b>	<b>Key Initiatives for 2020-2021</b>
A.	<p><b><i>To prepare all students for college, career, and life-long learning through</i></b></p> <ul style="list-style-type: none"> <li>• a balanced and healthy school experience,</li> <li>• continuity of curricula aligned with Commonwealth and community standards,</li> <li>• support for educators to experiment and innovate, and clear articulation of instructional models.</li> </ul>	<p><u>Focus Areas:</u>            A1. Implement short term plans and develop long term vision to support culturally responsive teaching practices.            A2. Utilize the District Configuration Education Plan (DCEP) committee work to frame and organize the district vision for teaching and learning, culture, and new school groupings.</p> <p><u>Ongoing Operational Work:</u>            A3. Continue district-wide implementation of Social Emotional Learning framework.            A4. Adopt new state model for English language learners (LOOK Act).</p>
B.	<p><b><i>To support continuous improvement and overall programmatic and fiscal stability by</i></b></p> <ul style="list-style-type: none"> <li>• engaging administrators, teachers, students, and community stakeholders in generally accepted practices of long-term strategic planning.</li> </ul>	<p><u>Focus Areas:</u>            B1. Collaborate with the Massachusetts School Building Authority, the BMHS Building Committee, Building Team (Architect &amp; Owner’s Project Manager), and BPS and Belmont community members to design and build our new Belmont Middle and High School.            B2. Work collaboratively to identify the ongoing and future fiscal needs of the district to support the advocacy of an override for the FY21 budget process.</p> <p><u>Ongoing Operational Work:</u>            B3. Continue to work with town officials to develop short and long term plans to support the fiscal needs of all town departments including schools.            B4. Conduct an audit of current special education programs and service-delivery models and develop plans to improve in-district capacity to meet a variety of special education needs.            B5. Continue to collaborate and advocate for the upkeep and maintenance of school facilities and to work toward the goals of Belmont’s Climate Action Plan.            B6. Develop the new Technology Plan for technology infrastructure and integration in support of teaching and learning at the new Belmont Middle and High School.</p>
	<p><b><i>To ensure that students receive instruction from consistently highly qualified educators who pursue continuous improvement of their art by</i></b></p> <ul style="list-style-type: none"> <li>• hiring well-prepared and diverse professionals,</li> <li>• sustaining continuous professional development by means of clear and coherent plans, and</li> <li>• implementing a successful educator evaluation system in line with new Commonwealth standards.</li> </ul>	<p><u>Ongoing Operational Work:</u>            C1. Continue to expand recruitment and retention efforts to increase the diversity of BPS faculty and staff.            C2. Develop shared expectations for observation and evaluation.            C3. Facilitate opportunities for adult learning especially in support of these key initiatives.</p>

## **FY21 SCHOOL DEPARTMENT INITIATIVES, GUIDED BY BELMONT PUBLIC SCHOOLS STRATEGIC PLAN**

- Support the Strategic Plan of the Belmont Public Schools.
- Continue the district-wide professional development for staff, to support the outcomes of the culturally responsive teaching practices. (A1)
- Continue the work of the District Configuration Education Plan Committee to organize the district vision for teaching and learning (A2)
- Continued review of class sizes and control of elementary assignments with planning for projected enrollment increases. (A)
- Continue to collaborate with the Massachusetts School Building Authority (MSBA), the BMHS Building Committee, Building Team (Architect & Owner's Project Manager), and BPS and Belmont community members to design and build our new Belmont Middle and High School. (B1)
- Continue to identify and advocate for the ongoing and future fiscal needs of the district and continue to work with town officials to develop short and long term plans to support the fiscal needs of all town departments including schools. (B2, B3)
- Continue to monitor and analyze the service delivery models for Special Education programs and to develop plans to improve in-district capacity to meet a variety of Special Education needs. (B4)
- Develop the new Technology Plan for technology infrastructure and integration in support of teaching and learning at the new Belmont Middle and High School. (B6)
- 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. (A, B)

## **FY21 BUDGET OBJECTIVES**

- Align FY21 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 a 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 Middle High School Building Project, including: staffing, curriculum and instruction, and operations.

#### **PRIMARY COST DRIVERS**

- Strategic Plan Based Cost Drivers
  - Student enrollment has increased each year for the past decade.
  - 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 4% for FY21.
  - 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 FY21, to support the overall Town Budget, the General Fund Special Education out-of-district tuition amount is budgeted at a decrease from the FY20 Budget. An additional \$1,700,000 will be charged to State Circuit Breaker carry over funds and Federal Individuals with Disabilities Act (IDEA) Grant carry over funds allocated to the district in FY20.
    - This is a one-time additional offset which is made possible by favorable State Circuit Breaker and IDEA allocations in FY20.
    - Replenishment of a commensurate amount of the additional Circuit Breaker and IDEA funds to be utilized in FY21 will need to be included in the School Department FY22 General Fund Budget.
    - Special Education transportation costs and contracted services are budgeted at the Task Force index factor of a 7% increase over the FY20 Budget.

#### UNKNOWN VARIABLES

- Further increases in student enrollment, and the cost of the corresponding additional student supports needed, especially in the areas of EL, 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 yet been determined for FY21.
- Impact of overall decrease in Out-of-District (OOD) funding available.
- New LABBB credit process.
- Ch. 70 process & dollar amount.

**FY21 BUDGET  
FINANCIAL HIGHLIGHTS**

The FY21 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 - 3.58% 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 - Add One Bus (for a Total of 10)	421,440	462,556	41,116	9.76%
Fringe	8,921,328	8,962,828	41,500	0.47%
Special Education Tuition, Transportation, Contr. Services	7,877,921	7,877,921	0	0.00%
<b>Totals</b>	<b>60,649,451</b>	<b>62,818,628</b>	<b>2,169,177</b>	<b>3.58%</b>

- Additional due to costs drivers

- Strategic Plan-based Costs Drivers: Additional 0.80% increase over the FY20 Budget

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

○ External Cost Drivers: 1.31% decrease over the FY20 Budget

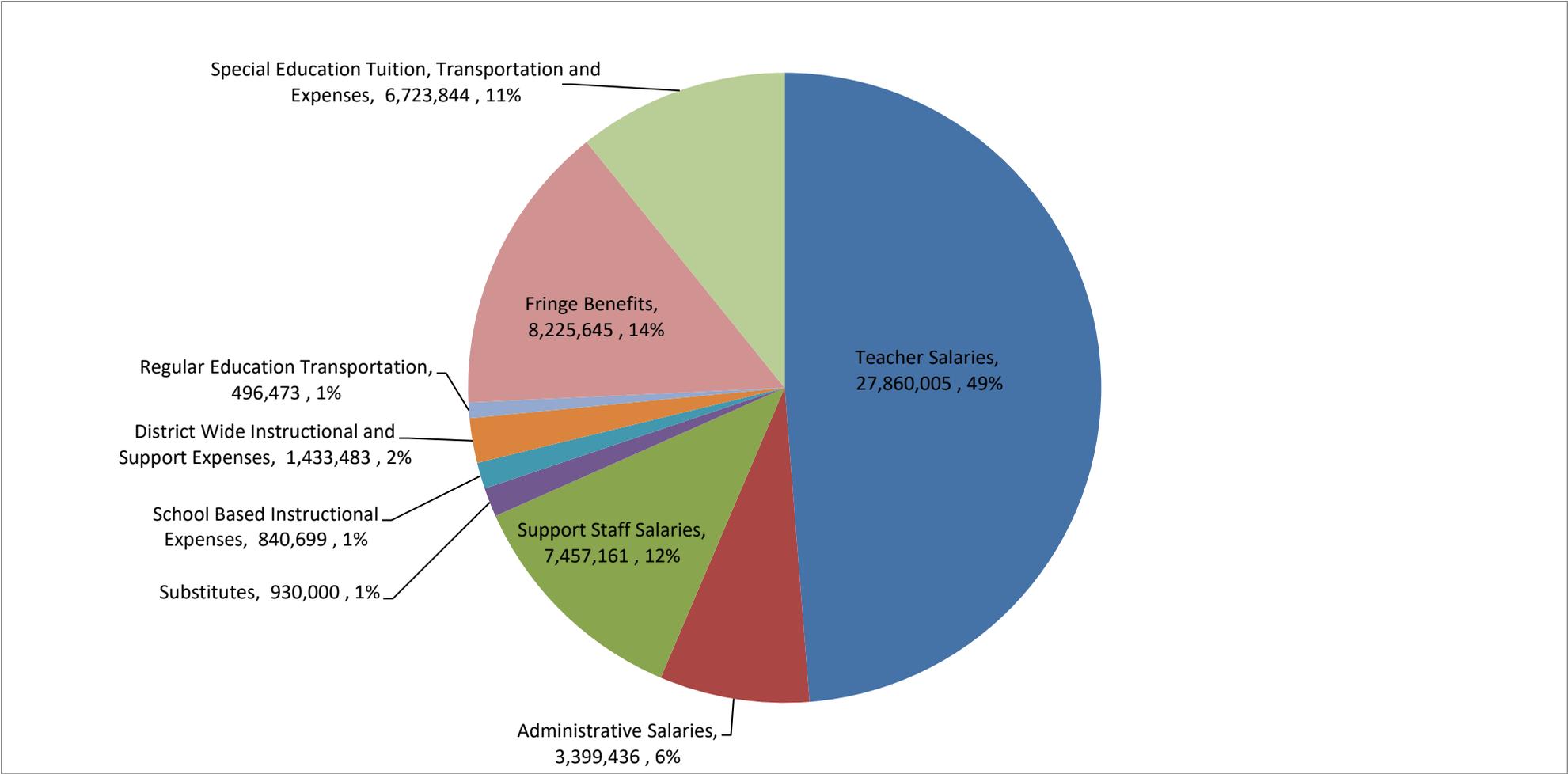
	<b>Change for FY21 Budget</b>
1. Health insurance rate increase for all Town Departments - 4%	357,773
2. Special Education Tuitions - One-time reduction of 1,700,000 to support overall Town budget; made possible by anticipated FY20 ending CB & IDEA balances (1,700,000 reduction applied after 7% index 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
<b>Total External Cost Drivers</b>	<b>-796,304</b>

**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%
<b>Total FY21 General Fund Budget</b>	<b>60,649,451</b>	<b>62,818,628</b>	<b>484,117</b>	<b>-796,304</b>	<b>62,506,441</b>	<b>1,856,990</b>	<b>3.06%</b>
<b>% Change over FY20 Budget</b>		<b>3.58%</b>	<b>0.80%</b>	<b>-1.31%</b>	<b>3.06%</b>		

# FY21 Belmont Public Schools General Fund Budget

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



## TECHNICAL BUDGET ASSUMPTIONS

- School General Fund Budget for FY21 is \$62,506,441.
- The district has developed a Five-Year Plan to add needed positions to address student enrollment, in conjunction with the District Configuration Education Plan.
  - Phase 1 of this plan (FY21) calls for an additional 15.00 FTEs in professional positions (see table below)
  - The FY21 Budget reflects rolling forward all existing positions; and adding only 5.80 FTEs of the 15.00 FTEs in Phase 1 of the Five-Year Plan
- Health insurance premiums are budgeted to increase by 4% over FY20 rates (Town-wide).
- Special Education:
  - To support the overall Town budget, the FY21 Special Education out-of-district tuition General Fund budget is a decrease from the FY20 General Fund budget; with an additional \$1,700,000 in costs to be charged to State Circuit Breaker funds and IDEA Grant funds allocated to the district in FY20. This \$1,700,000 is in addition to amounts ordinarily planned to be charged to these external funding sources. This is a one-time adjustment based on favorable State Circuit Breaker and IDEA Grant allocations in FY20.
  - Special Education transportation and contracted services are budgeted at the Town Financial Task Force index factor of 7% over the FY20 Budget.
- Federal grants budgeted in FY21 as level funded from FY20 plus contractual increases for staff allocated to grants.
- User fees will remain the same for FY21.
- State Circuit Breaker and IDEA allocations will continue to be used strategically, in accordance with the School Department's Multi-Year Out-of-District Funding Plan.

**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**

\*Note: This list of 15.00 FTEs represents only Year 1 of a Five-Year District Staffing Plan; and FY21 Budget funding permits the filling of 5.80 of the 15.00 Year 1 FTEs. The estimated cost of the first 5.80 FTEs is \$400,000. As these 5.80 positions are filled, the district will evaluate the actual versus budgeted costs and endeavor to fill any additional positions to the extent possible. This listing and the prioritization is based on the most recent data available; and changes in the actual positions hired may occur based on developing changes in enrollment and/or student needs.