Arlington Public Schools

FY 2017 Budget
A Presentation To
The Arlington Finance Committee
March 16, 2016
Agenda

- School Committee Members
- Budget Development Process & Timeline
- FY16 Year-to-Date
- Major Discussion Points FY17
  - Enrollment
  - School Enrollment Task Force
- Into the Future
  - Technology Plan
  - Special Education & Interventions
Arlington School Committee

- Paul Schlichtman, *Chair*
- Jennifer Susse*, Vice – Chair*
- Jeff Thielman, *Secretary*
- Kirsi C. Allison-Ampe*, Budget Chair*
- William Hayner*
- Judson L. Pierce
- Cindy Starks

*Budget Subcommittee Member*
APS Budget Development Timeline

- Spring – Establishment of SC Budget Subcommittee
- Summer through Winter – Administrative team meets
- Fall through Winter – Ongoing meetings between Cabinet & School Committee Budget Subcommittee help shape Superintendent’s Budget
- February 11 – Superintendent’s Proposed Budget presented to School Committee
- February 25 – Public hearing by School Committee
- March 10 – Second public hearing by School Committee, School Committee revises & approves School Committee Budget
- March 16 – Finance Committee hearing
- May – Arlington Public Schools Budget presented to Town Meeting with endorsement of Finance Committee
APS Budget Development Process

- Principals
- Superintendent & Cabinet
- School Committee Budget Subcommittee
- School Committee
- Curriculum Coordinators
Arlington Public Schools
Participants in Budget Development Process

Principals
- Kristin DeFrancisco, Hardy
- Thad Dingman, Dallin
- Karen Donato, Thompson
- Michael Hanna, Stratton
- Karen Hartley, Peirce
- Matthew Janger, Arlington High
- Mark McAneny, Bishop
- Timothy Ruggere, Ottoson
- Stephanie Zerchykov, Brackett

Cabinet
- Kathleen Bodie, Superintendent
- Laura Chesson, Assistant Superintendent
- Diane Johnson, Chief Financial Officer
- Julie Dunn, Director of Communications & Grants
- Alison Elmer, Director of Special Education
- Rob Spiegel, Human Resources Officer
- David Good, Chief Technology Officer
Participants in Budget Development Process

Curriculum Coordinators

David Ardito – Visual Arts
Cindy Bouvier – Health & Wellness
Carla Bruzzese – English Language Learners
Matthew Coleman – Mathematics
Denton Conklin – Social Studies
Deb Perry – English Language Arts
Catherine Ritz – World Languages
Larry Weathers – Science

Technology

David Good – Chief Technology Officer

Budget Production Contributors

Claudia Bertoli – Webmaster
Julie Dunn – Director of Communications & Grants
Neile Emond – Purchasing
Connie Russell – School Accountant
Rick Iannelli – Transportation
Diane Johnson – CFO
Julia McLaughlin – Payroll
FY 16 Year to Date Results

- Stratton School construction will begin in June 2016 for completion by August 2017. Students will be housed on-site in temporary modular classrooms.

- MSBA Board invited AHS on January 27 into the Eligibility Period. A commencement vote is expected on May 25.

- Space Planning report, including an enrollment forecast, presented to the School Committee in September 2015. Enrollment forecast updated in December 2015. For more information, please see: http://www.arlington.k12.ma.us/administration/facilitiesenrollment/pdfs/apsspaceplanningstudyreportsept2015.pdf

- School Enrollment Task Force formed to address space needs highlighted by the study. For more information, please see: http://www.arlingtonma.gov/town-governance/all-boards-and-committees/school-enrollment-task-force
Enrollment has been increasing each year since FY13, resulting in 534 new students. Total enrollment for FY16 is 5,410.

School Department projections estimate an increase of 196 new students in FY17.
- If enrollment trends continue as projected, APS will reach 6,000 in FY20.

McKibben Demographic Research forecasts (December update) an increase of 121 students in FY17.
- If enrollment trends continue as forecast, APS will reach 6,000 in FY22.
  - *McKibben numbers do not include Arlington students in out-of-district placements.
Current thinking:

- Proceed with the High School project in partnership with the Massachusetts School Building Authority
- Evaluate the relative merits of addressing overcrowding at the Ottoson Middle School through further study of:
  - Addition to OMS in one of two possible locations
  - Gibbs school to APS service
- Address enrollment increase at Thompson:
  - Temporary modular classrooms for the FY17 school year
  - Possible construction of a permanent addition ready for the start of the FY18 school year
- Maintain watchful eye on evolving enrollment trends
Student Enrollment Projection
(includes out of district placements)
Student Enrollment Forecast from McKibben Demographic Research

(does not include out of district placements)
Gratitude to Town of Arlington for recent adjustment to Enrollment Factor for APS in Town Appropriation

- Enrollment growth greater than projected when 5 year plan approved
- 534 new students in last three years
- Previously 25% of per pupil cost for each additional enrollment from prior year
- Now increased to 35% to better provide for budgetary impact of growth
# Detail of FY17 Growth Factor

<table>
<thead>
<tr>
<th></th>
<th>FY 2016</th>
<th>FY 2017</th>
<th>$ Increase</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Education Costs</td>
<td>$34,572,590</td>
<td>$36,331,252</td>
<td>$1,758,662</td>
<td>5.09%</td>
</tr>
<tr>
<td>Special Education Costs</td>
<td>$17,501,455</td>
<td>$18,726,557</td>
<td>$1,225,102</td>
<td>7.00%</td>
</tr>
<tr>
<td>Kindergarten Fee Offset</td>
<td>$970,000</td>
<td>$970,000</td>
<td>$0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Growth Factor</td>
<td>$530,069</td>
<td>$973,524</td>
<td>$443,455</td>
<td>83.66%</td>
</tr>
<tr>
<td><strong>TOTAL SCHOOL BUDGET</strong></td>
<td>$53,574,114</td>
<td>$57,001,333</td>
<td>$3,427,219</td>
<td>6.40%</td>
</tr>
</tbody>
</table>

## Growth Factor Breakdown

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 16 Enrollment Growth</td>
<td>84</td>
</tr>
<tr>
<td>DESE PPC for Arlington</td>
<td>$13,085</td>
</tr>
<tr>
<td>35% of PPC for Arlington</td>
<td>$4,579.75</td>
</tr>
<tr>
<td><strong>Growth Factor (35% PPC x 84)</strong></td>
<td>$384,699</td>
</tr>
<tr>
<td>FY13 - FY15 Enrollment Growth</td>
<td>450</td>
</tr>
<tr>
<td>10% of PPC for Arlington</td>
<td>$1,308.50</td>
</tr>
<tr>
<td>Gap Funding</td>
<td>$588,825</td>
</tr>
<tr>
<td><strong>Total FY 17 Growth Factor</strong></td>
<td>$973,524</td>
</tr>
</tbody>
</table>
Vision for the Arlington Public Schools

- Every APS graduate will be ready for college, career and active citizenship
- APS will build staff capacity, fostering continuous improvement
- APS will provide a cost effective education supporting optimal teaching and learning
- In partnership with all town departments, APS will engage in effective collaboration and communication with all stakeholders
FY17 Budget Priorities

- Retention and compensation of faculty and staff
  - FY17 second year of new contracts
  - Additional 2% for staff outside of collective bargaining

- Enrollment growth & class size mitigation
  - OMS ½ cluster and specialists
  - 2 elementary teachers, 2 reserve teachers
  - AHS mathematics

- Support for high needs students
  - Elementary learning specialists
  - Elementary math coaching and intervention
  - OMS nurse and social worker
  - Co-taught math at AHS

- Essential curriculum materials & unfunded mandates
  - Common Core MA State Standards
  - K–8 curriculum materials
Six Year Comparison by Budget Transfer Categories

<table>
<thead>
<tr>
<th></th>
<th>FY12 Actuals</th>
<th>FY13 Actuals</th>
<th>FY14 Actuals</th>
<th>FY15 Actuals</th>
<th>FY16 Projected</th>
<th>FY17 Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>10,987,711</td>
<td>11,405,627</td>
<td>12,385,401</td>
<td>13,954,506</td>
<td>14,683,090</td>
<td>15,657,470</td>
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<tr>
<td>Secondary</td>
<td>11,396,002</td>
<td>12,362,453</td>
<td>13,059,911</td>
<td>13,625,144</td>
<td>14,544,334</td>
<td>15,405,111</td>
</tr>
<tr>
<td>Special Education</td>
<td>16,025,742</td>
<td>16,573,020</td>
<td>17,157,368</td>
<td>17,292,858</td>
<td>17,818,927</td>
<td>19,130,649</td>
</tr>
<tr>
<td>Curric. &amp; Instr.</td>
<td>1,267,148</td>
<td>1,557,114</td>
<td>1,329,141</td>
<td>1,404,711</td>
<td>1,238,742</td>
<td>1,445,418</td>
</tr>
<tr>
<td>Admin</td>
<td>2,286,877</td>
<td>2,591,696</td>
<td>3,022,325</td>
<td>2,460,418</td>
<td>3,108,421</td>
<td>3,320,405</td>
</tr>
<tr>
<td>Other (IT, Facilities &amp; Trans.)</td>
<td>5,945,357</td>
<td>5,554,045</td>
<td>5,736,905</td>
<td>5,473,043</td>
<td>5,636,793</td>
<td>5,547,691</td>
</tr>
</tbody>
</table>
Summary of FY17 Proposed Budget Changes

- Net increase in Revenue $3,220,361
- Total Contractual/Salary Increases $1,691,084
- Total Proposed Increases $1,529,277
- Increases Desired but not Funded $2,354,358

For greater detail visit: FY17 Superintendent’s Proposed Budget Section 2 Superintendent’s Budget Message
FY17 Proposed Budget Expense by Major Category
Total Budget $62,637,124
Funding the Vision

- FY17 revenues of $62,637,124
  - up 5.4%, or $3,220,361
    - 3.5% growth in General Education
    - 7% growth in Special Education
    - Level fund Kindergarten Fee offset
    - Enrollment Factor

- Key drivers
  - Town appropriation increase of $3,427,219
  - Grants projected to decline $322,153 (Kindergarten and Title 1)
  - Fees & reimbursements projected to increase $115,295 (this includes use of $250,000 prior year reserves)
  - FY16 Circuit Breaker payment of $1,824,232 to be used in FY17
FY17 Proposed Budget Funding Summary
Total Funding $62,637,124

- Revolving Fees & Reimbursements, $3,505,412
- Grants, $2,130,379
- Town Appropriation, $57,001,333
Technology Plan Overarching Vision

It is our overall goal to provide students with an educational experience that enables them to:

- Work independently and collaboratively
- Analyze and synthesize multiple forms of evidence
- Use evidence to create robust arguments
- Present those arguments in oral, written, and digital form
Technology Priorities for 2016 –2017

- MCAS 2.0 testing will require an all-digital format in 2019
- Students need access to technology in order to prepare for the online assessments – including MCAS, ACCESS testing for English Language Learners, national World Language exams
- Teachers need access for Educator Evaluation System
- 45% of assistive technology for special education students is five years or older – to be replaced in FY17
- Thompson one-to-one computing replacement began this year with 1/3 of devices replaced. Another 1/3 is planned for replacement in FY17 and remaining 1/3 in FY18
Arlington Special Education and Interventions

- Definition of Special Education costs in Arlington
  - Includes Special Education Grant funded costs, Legal and Transportation costs when directly supporting Special Education students

- Definition of Interventions in Arlington
  - Includes Math and Literacy RTI, Academic Challenge & Enrichment, Guidance
  - Supports both General Education and Special Education students

- Why are both Special Education and Interventions necessary?
  - Special Education legally mandated for eligible students
  - Interventions reach students who are struggling but not necessarily eligible for Special Education services

- English Language Learners (ELL) services transitioning from state recommendations to state mandates
Five Year Comparison Showing Interventions Expense

<table>
<thead>
<tr>
<th></th>
<th>FY13 Actuals</th>
<th>FY14 Actuals</th>
<th>FY15 Actual Expense</th>
<th>FY16 Projected</th>
<th>FY17 Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Education</td>
<td>22,660,897</td>
<td>23,793,138</td>
<td>25,870,060</td>
<td>27,180,814</td>
<td>29,006,748</td>
</tr>
<tr>
<td>Interventions</td>
<td>2,530,082</td>
<td>2,755,443</td>
<td>3,498,786</td>
<td>3,602,560</td>
<td>3,758,402</td>
</tr>
<tr>
<td>Special Education</td>
<td>16,573,020</td>
<td>18,518,189</td>
<td>18,677,586</td>
<td>19,210,602</td>
<td>20,507,602</td>
</tr>
<tr>
<td>Direct Professional Development</td>
<td>149,719</td>
<td>225,872</td>
<td>282,206</td>
<td>176,562</td>
<td>232,250</td>
</tr>
<tr>
<td>Admin &amp; Infrastructure</td>
<td>8,145,741</td>
<td>8,759,230</td>
<td>8,435,652</td>
<td>9,309,649</td>
<td>9,132,122</td>
</tr>
</tbody>
</table>
Special Education Expense by Funding Source

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Portion SpEd Exp Funded by Town Appropriation</th>
<th>Circuit Breaker</th>
<th>SpEd Grants Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY11 Actual</td>
<td>11,485,164</td>
<td>505,411</td>
<td>2,265,670</td>
</tr>
<tr>
<td>FY12 Actual</td>
<td>13,912,095</td>
<td>598,011</td>
<td>1,514,666</td>
</tr>
<tr>
<td>FY13 Actual</td>
<td>13,785,635</td>
<td>1,410,471</td>
<td>1,376,914</td>
</tr>
<tr>
<td>FY14 Actual</td>
<td>15,617,823</td>
<td>1,536,592</td>
<td>1,363,774</td>
</tr>
<tr>
<td>FY15 Actual</td>
<td>15,621,920</td>
<td>1,666,231</td>
<td>1,389,435</td>
</tr>
<tr>
<td>FY16 Projection</td>
<td>15,814,455</td>
<td>1,961,263</td>
<td>1,434,884</td>
</tr>
<tr>
<td>FY17 Budget</td>
<td>17,262,835</td>
<td>1,824,232</td>
<td>1,420,535</td>
</tr>
</tbody>
</table>
Special Education Percentage Growth from Prior Year

- FY12: 12%
- FY13: 10%
- FY14: 12%
- FY15: 8%
- FY16 Projected: 10%
- FY17 Proposed: 12%
The Arlington School Committee respectfully requests your approval of the FY17 Budget voted by School Committee on March 10, 2016