

**Andover Public Schools  
Andover, Massachusetts**

**FY 14 Budget Development Guidelines  
Approved by Andover School Committee – January 10, 2013**

**School Committee Priorities**

The School Committee budget should reflect the priorities that address the needs of the Andover students and schools. These priorities should provide direction to administrators and guide staff in developing budget recommendations. The priorities also should guide the School Committee in its deliberations and the budget planning process.

The budget should reflect the following priorities, in relative order. The School Committee may sometimes choose to fund items addressing the lower priorities over items that may claim a higher priority. While not done lightly, such choices must sometimes be made to ensure that no priority is neglected.

1. The District’s mission, values and goals;
2. The need for highly qualified staff teaching within the established class size policy;
3. The ongoing refinement of curriculum, instruction, and assessment practices;
4. The need to develop and maintain educational resources, technology infrastructure, and school facilities that support student learning and meet District goals.

**School Committee Budget Assumptions**

The budget is developed with certain assumptions and priorities by the School Committee. For example, the budget reflects the assumption that the school district will meet all federal, state and local mandated programs and requirements. Thus, the budget should include sufficient resources and funding to meet contractual obligations, mandated programs, and high school accreditation standards, including:

**A. Programs Under Federal, State and Local Mandates and Accreditation Agencies**

**1. Special Education: Federal - IDEA & MA General Law 71B & 603 CMR 28.00**

- a. Meet the federal requirement to provide a free and appropriate public education to students with disabilities in the least restrictive environment. This often means creating programs to retain students “in-district”, whenever possible:
- b. Priority is given, whenever possible, to providing in-district special education programs to students;
- c. Where Out-of-District programming is required,
  - i. Provide for Special Education Out of District Tuition costs;
  - ii. Provide for Special Education Transportation
- d. Implement and maintain systems for complying with monitoring, procedural review, and paperwork requirements.

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2. **Federal No Child Left Behind (NCLB) Act. (Federal Elementary and Secondary Education Act)**
  - a. Meet federal requirements to have all students become proficient on state testing standards by 2014, by making Adequate Yearly Progress (AYP) toward yearly performance goals;
  - b. Implement and maintain systems for student data collection, and reporting (to provide evidence of AYP);
  - c. Hire and retain “Highly Qualified” teachers through professional development and licensing;
  - d. Implement and maintain systems for tracking and monitoring teacher credentials (to provide evidence of Highly Qualified staff); and
  - e. Continue to work towards closing the achievement gap for minority and special education students.
  
3. **English Language Learners (ELL)**
  - a. Meet the federal (Title VI, Civil Rights Act, and state (MGL C71-A) bilingual students that require districts to provide limited English proficient (LEP) students with support services until they are proficient enough to participate meaningfully in the regular education program;
  - b. Provide schoolhouse support and tutoring for all LEP students;
  - c. Implement, coordinate, and maintain systems for student identification, assessment, support, and student data reporting; and
  - d. Provide training in sheltered English immersion practices to teachers with LEP students in their classrooms.
  
1. **Section 504 and Americans with Disabilities Act (ADA)**
  - a. Meet the federal requirement to provide accommodations so that all people (students, faculty, and community) can participate in activities in our schools, regardless of disability. These accommodations can include building modifications, specialized equipment, instructional or testing changes, or care from a nurse or other staff member.
  
2. **MA Education Reform Act of 1993**
  - a. Provide MCAS support; and continue to close the achievement gap for minority and special education students,
  - b. Comply with Educational Proficiency Plans (EPP) development for high school students, and
  - c. Comply with state financial, pupil, and student reporting requirements.
  - d. Comply with state/federal requirements relative to the Common Core standards.
  - e. Comply with the state guidelines relative to computer student ratios.
  - f. Comply with the state guidelines relative to the professional development expenditures.
  
3. **New England Association of Secondary Schools and Colleges (NEASC)**
  - a. Provide funding and resources for Accreditation. Report due in March 2013. **To address recommendation in NEASC report.**

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**4. MA Anti-Bullying Legislation**

- a. Comply with state requirement to (1) provide staff development for staff, students, and parents, (2) provide services for students and parents, and (3) provide the appropriate programming and materials for a PK-12 student empowerment curriculum.

**Guidelines for Budget Requests**

There are two levels of funding requests within the School Committee's budget: Base Budget requests and Strategic Plan Program Improvement Budget requests.

- 1. The **Base Budget** assumes the same level of service to the schools from the FY 13 budget to the FY 14 budget, including the current school programs, staffing levels, class sizes, and services. The base budget includes:

- A. The total FY 13 budget appropriation;
- B. Statutory or regulatory mandates and accreditation requirements;
- C. Personnel step, longevity, and collective bargaining increases (including cost of living);
- D. Increases under other existing contracts;
- E. Significant inflationary or enrollment increases (inflationary increase in the cost of students' supplies, additional teachers to maintain class sizes of elementary and high school, etc.).

These requests should include:

- a. Specific dollar increase by line item; and
- b. Purpose of the requested increase; and

- F. Other items considered necessary and recommended by the Superintendent

- 2. The **Strategic Plan** initiatives are included in the Base Budget and represent the funds for improved service to the students of Andover. The Strategic Plan Budget is the budget mechanism the School Committee will use to invest in service and program improvements/innovations/initiatives for the Andover Public Schools. The Strategic Plan is not a wish list rather it reflects the need to grow and improve the schools in a way consistent with the mission, values, and goals of the Andover Public Schools and the high expectations of the Andover community. Strategic Plan requests must be listed in order of priority and include:

- a. Specific dollar amount;
- b. Purpose of request;
- c. Projected impact of request on service delivery and
- d. Identification of grants or other outside sources of revenues;
- e. Reflect the district's values and goals.

**3. Expenditures**

**A. Staff and Programs**

- 1. **Staff and Programs** – Budget for level services with the understanding that we will consider equal-cost substitutions in the recommended budget with all assumptions clearly defined.

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- a. **Classroom Teacher** - For FY 14, budget a new full-time teacher at \$62,689 – M/8, plus associated operating costs of \$1,500 for a computer and \$210 classroom consumable supplies, which represents a 5% increase in supplies.
  - b. **Instructional Assistant** – For FY 14, budget a new full-time teaching assistant at \$18.21/hour – S/4. Full year salary for step 4 assistant is \$23,458. Median salary of all 1.0 FTE’s is: \$24,232
2. **Ensure all legal mandates and high school accreditation requirements are met.** – Special education, Section 504 and ADA, English Language Learners, MA Ed Reform Act, and NEASC.
3. **Ensure professional staffing guidelines are met to address** class size policy, enrollment shifts, and legal needs.
4. **Identify alternatives which will provide services in more cost-effective ways** (e.g. build more in-house capacity to avoid some special education out-of-district costs, reorganize current educational organizational structure; reduce energy consumption, explore the cost effectiveness of lease-purchasing technology, find less expensive means of purchasing some products.)
5. **Technology** – Only technology plan related requests may be included and will need to be funded through an amount determined by the Assistant Superintendents, CIO, and Superintendent.
6. **Professional Development** – Budget requests within per pupil instructional allotments.
7. **Textbooks** – Fund any *replacement textbooks* (and those needed for enrollment shifts) through the school instruction accounts and/or lost book accounts. Funds for *new textbook adoptions* are not to be included in schoolhouse accounts as these items are addressed in Assistant Superintendent’s CIP request.

Funding requests should be noted in the schoolhouse budget and submitted through the Assistant Superintendent as a new textbook request that is clearly defined and aligned with curriculum review process and recommendation. Requests for new textbooks from individual schools/departments will not be considered if they are requested outside the curriculum review process and after the FY 14 budget is developed.

Change in High School schedule to a 3X3 may increase the need for additional texts. Courses that were previously run in opposite semesters may be running currently.

8. **General and Instructional Supplies** – FY 2014 General and Instructional Supply line items will be level funded but adjusted to reflect October 1, 2012 enrollment numbers.
9. **Projected PK – 6 Consumables** – Using October 1, 2012 enrollment numbers, analyze projected consumable costs for Reading “Foundations” and Everyday Math. Per pupil costs shall remain at FY 2013 levels and will not be adjusted for inflation. Line item adjustments will be made as necessary for FY 2014 projected costs.
10. **Special Instructional Requests** – Budget \$4,000 for new classrooms that need to be furnished and equipped (supplies, textbooks, & equipment) due to an enrollment increase. This account is not to be used for instructional supplies, textbooks, or technology for *existing* classrooms or programs.

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**B. User Fees**

1. **HS Athletics** – Until the SC reviews its user fee policy in January, it is understood that Athletics will be offset by an estimated \$265,000 in user fees and \$103,000 in gate receipts and rentals. User fees are recommended to increase from the current rate of \$350 per student to \$380 per student. The family max is recommended to increase from the current max of \$700 to a max of \$760. Proposed increases subject to the approval of the School Committee.

2. **K-12 Extra-curricular Activities** – User fees will be differentiated by level.

The middle school after school extracurricular activities fee is \$100 per student with a family maximum of \$150 unless otherwise determined by the School Committee.

The high school Choral/Music fee will be absorbed by the operating budget.

3. **Bus Transportation Fees** -Budget bus transportation fee at \$300 with a family maximum of \$600 unless otherwise determined by the School Committee.

4. **Parking Fees** – Budget at \$60,400. Budget parking fees at \$200, unless otherwise determined by the School Committee.

**C. Contractual Obligations**

1. **Transportation Program**

a. **Regular Education Transportation** –We will recommend exercising the second and final year of a two year option to extend for one year. During FY 2013 we found it necessary to increase our regular education bus fleet by one additional vehicle, for a total of 34. Due to increased enrollment and limited space for paid riders we will recommend adding one more vehicle for a total FY 2014 fleet of 35. Final budgeted cost for regular education transportation will be offset by \$365,000 estimated user fees.

b. **Mid-Day Kindergarten Transportation**- We will recommend exercising the second and final year of a two year option to extend for one year. The projected daily cost per bus is expected to increase by \$10.00/day/bus for an estimated budget increase of approximately \$19,000.

c. **McKinney-Vento Homeless Act**–We budgeted \$25,000 for FY 2013 and will level fund the Homeless Transportation account for FY 2014, unless actual costs during FY 2013 indicate otherwise.

d. **Special Education Out-of-District & Summer Transportation**-We will develop the **FY 2014 Out-of-District Sped Transportation Budget, including summer transportation**, based on current student population and year 1 of a new contract. The FY14 budget for this line item is projected to increase by approximately 3%.

e. **Special Education In-District & Summer Transportation**- We will develop the **FY 2014 In-District Sped Transportation Budget, including summer transportation**, based on current student population and year 1 of a new contract. The FY14 budget for this line item is projected to increase by approximately 3%.

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- f. **Extracurricular, Field Trips and Athletic Transportation**- Original contract awarded in 2009 was for three years , with the provision that the contract may be extended for a period of not to exceed two years (two additional one year terms), at the sole option of the Committee. In FY 2013 we exercised year one of the two year option to extend. For FY 2014 we will plan to exercise year two. NRT held the hourly rates for year two. Knowing the rates in advance will be beneficial to the Athletic Director as he develops his FY 2014 Athletic Operating Budget.

**2. FY 14 Salary Projections**

- a. **Settled collective bargaining contracts** (*All Contracts Settled*) – Collective bargaining 2% COLA increases, plus (if applicable) steps, continuing education increment, longevity, and stipends. Estimated total cost increase to the FY 2014 Budget is \$2,172,830.
- b. **Individual contracts** – (administrators) - COLA to be determined by School Committee. Assuming Committee approves 2% COLA for the Administrative Team then the incremental cost would be \$38,358.
- c. **Substitute Teacher Pay - Currently**, we pay our substitute teachers between \$65-\$75/day. We have not increased the pay since the mid-1990's and as a result we have fallen behind our neighboring systems and this has made retaining this transient work force increasingly difficult. We project a 15% increase in these line items for the following reasons: 1. Increase to the daily rate; 2. Year-long increase in professional development specifically as it pertains to education and implementation of the new teacher evaluation program.

**3. Utilities**

- a. Gas- Plant & Facilities has recommended increasing the Natural Gas accounts by a total of \$100,000 or 21% over the previous year's budget.
- b. Oil- Based upon a recommendation made by Plant & Facilities we will level fund our Fuel Oil accounts.
- c. Electricity- Plant & Facilities has advised that the previous year's budget for electricity accounts included repayment of Ngrid loans for lighting projects. Those loans will not be a factor in FY 2014; therefore, we will reduce all related school Electricity accounts by approximately 17%. The total projected reduction equates to approximately \$144,500.

*Note: The sum total of the Gas, Oil and Electricity budgets for FY 2014 is expected to net out \$44,535 lower than the sum total of the FY 2013 Gas, Oil and Electricity expense budgets.*

- d. Telephone/communications ..... FY14: Level Fund

- 4. Custodial Supplies & Materials** - Budget using historical data and current trends for costs increases. The Assistant Superintendent – Finance will provide building specific information.

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**D. Capital Costs – Budgeted for in Town Budget**

1. **“CIP” Projects must** be documented and included in the initial budget for consideration to the Assistant Superintendent – Finance and Superintendent. The Superintendent and Assistant Superintendent – Finance will review the projects and make recommendations to the School Committee regarding what should be funded in the Town’s CIP Budget.
2. **Capital Requests (in excess of \$25,000)** – Principals will submit requests for capital needs with estimates and documented needs to the Assistant Superintendent-Finance. The Superintendent and Assistant Superintendent – Finance will review the projects and make recommendations to the School Committee regarding what should be include in a capital request to the Town’s CIP Budget.

**E. Unfunded Mandates and HS Accreditation Requirements - MA Gen Law 71B & 603 CMR 28.00**

**1. Special Education: Federal - IDEA & MA General Law 71B & 603 CMR 28.00**

- a. **In-District Program & Transportation** – Budget using known students at the time of budget submittal and include in-house program proposals that are cost effective alternatives to out-of-district placement.
- b. **In-District Summer Program & Transportation** – Budget using known students at the time of budget submittal and include in-house program proposals that are cost effective alternatives to out-of-district placement.
- c. **Out-of-District Tuitions & Transportation** – Budget using the known students at the time of budget submittal and best estimate on tuition rate increases.

**2. Regular Education: Federal - MA General Law 71B; 603 CMR 28.00; 603CMR 35.00**

- a. **Section 504 & American with Disabilities Act (ADA)** – Budget using the known students at the time of budget submittal. (*Pub. L. No. 93-112, 87 Stat. 394 (Sept. 26, 1973), codified at 29 U.S.C. § 701 et seq.,*)  
Will level fund to FY 2013 budget amounts.
- b. **English Language Learners** - Budget using the known students at the time of budget submittal. . The added regulations call for all teachers to begin to utilize the World Class Instructional Design and Assessment (WIDA) standards. The associated cost to the district is projected to be \$5500. In addition to WIDA, ALL teachers (classroom and ESL) and administrators will be expected to participate in a new training program (Rethinking Equity and Teaching for English Language Learners – RETELL) beginning in July of 2013 extending to 2016. This additional training costs \$5,000 per session. We hope to be able to offer two sessions during the 2013 – 14 school year for a total cost of \$10,000.
- c. **New Educator Evaluation Regulations – CMR 35.00** – Andover must implement the new teacher Evaluation system in September 2013 with a minimum of 50% of the staff. There are continued training needs and associated curriculum costs for assessment development which need to be budgeted at approximately \$12,000.

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- d. **MA Ed Reform Act** - Budget using known students needing MCAS support and remediation or Educational Proficiency Plans (EPP - high school only) at the time of budget submittal. (*MGL C 71*).
- e. **Anti-Bullying Legislation** – Budget using known expenses relative to professional development, student/parent services, legal expenses, curriculum development, purchase and implementation costs. (*MGL: §92*) No new regulation anticipated for FY 2014.
- f. **McKinney-Vento Homeless Act** – The costs incurred are largely unpredictable and we have limited history. In February 2012 the State Auditor was able to calculate the FY2012 McKinney-Vento burden on cities and towns. The burden upon Andover was projected to be \$24,700. We plan to level fund this line item.

**3. HS Accreditation**

- a. **NEASC** – Andover High School had its 10 year accreditation visit in December 2012. We expect the report with recommendations and commendations to be sent to us in March 2013. The FY 14 budget will need to have funding to begin to address the recommendations. We expect, at a minimum, that there will be recommendations to implement an advisory program and develop common assessments and the cost impact will be determined during the budget development process.

**F. Revenue Items**

- 2. **State Aid: Chapter 70** – FY2013 amount is \$7,950,343. Governor’s budget due out January 31, 2013.  
  
**State Aid: SPED Circuit Breaker** – FY 2013 Circuit Breaker is \$2,091,850 or 70% of our net eligible claim. We are mindful of the fact that the State may fund approximately 40% of our eligible claim in FY14.
- 3. **Special Needs Tuition** – As of December 2013 we have no students from another district paying a tuition for special need services.
- 4. **Early Childhood Tuition: Preschool Peer Partner**-The tuition will be 5 days = \$5,265 FD/\$4,265 HD; 4 days = \$4,538 FD/\$3,538 HD; 3 days = \$4,115FD/\$3,115HD; 2 days = \$3,350FD/\$2,350HD per student unless otherwise determined by the School Committee. **Current status of revolving account is under review, therefore, FY 2014 tuition TBD**
- 5. **All Day Kindergarten Tuition** – All day kindergarten tuition will be \$4,500 per student for FY 14. Discounts are available for multiple births, unless otherwise determined by the School Committee. **Current status of revolving account is under review, therefore, FY 2014 tuition TBD**
- 6. **Rental Income** – Only the Athletic Department generates rental income for the District. This income is part of the gate and rental offset to the Athletic Department Budget. See user fees for specific amount. The Collins Center is a separate revolving fund which is to be self-sustaining.