

Andover (MA) Public Schools
FY 17 Budget Development Assumptions & Guidelines
Andover School Committee – October 8, 2015

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.
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 making Adequate Yearly Progress (AYP) toward yearly performance goals and working to close the achievement gap for minority and special education students.
 - b. Implement and maintain systems for student data collection, and reporting regarding 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).

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3. English Language Learners (ELL)

- a. Meet the federal (Title VI, Civil Rights Act, and state (MGL C71-A) guidelines set for English Learner Education (ELE) programs 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;
- d. Adhere to federal and state guidelines for translations and interpretation for families of our English Language Learners (ELLs) and
- e. Provide training in sheltered English immersion (SEI) for all core academic teachers and all administrators who evaluate those teachers. (RETELL State Initiative).

4. 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.

5. 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.

6. Partnership of Assessment Readiness for College and Career (PARCC)

Comply with Department of Elementary and Secondary Education testing requirements for the PARCC (Partnership of Assessment Readiness for College and Careers) or MCAS (Massachusetts Comprehensive Assessment System). Comply with the state technology requirements for the administration of the PARCC (Partnership of Assessment Readiness for College and Careers) field test.

7. Educator Evaluation System

Comply with and meet the standards of the educator evaluation system.

8. MA Anti-Bullying Legislation

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 curriculum.

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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 **Level Service Budget** allows us to deliver the same level of services to the schools from the FY 16 budget to the FY 17 budget, including the current school programs, staffing, class sizes, and services as well as contractual increases, compliance requirements and enrollment that affect these level services that we are delivering today. The level service budget includes:

- A. The total FY 17 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.
- F. Summer Help to assist custodians in removing and returning classroom furniture (new request)
- G. These requests should include:
 - a. Specific dollar increase by line item;
 - b. Purpose of the requested increase; and
- H. Other items considered necessary and recommended by the Superintendent

2. The **Strategic Plan Budget** includes funding to meet level services, compliance, AND funding for Strategic Plan investments to enable the district to move forward with learning opportunities for APS students. The Strategic Plan Budget is the budget mechanism the School Committee will use to invest in program innovations/initiatives/improvements and NEASC recommendations 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 vision, 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
- D. Identification of grants or other outside sources of revenues
- E. Reflect the district’s values and goals

3. Expenditures - Staff and Programs

- A. **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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- 1. Classroom Teacher** - Budget new full-time teachers at \$63,787 which is M-7 on the FY 2017 Salary Scale. In addition, we will budget associated operating costs for a computer, licenses and consumable supplies. Where applicable, we will apply an estimated rate of inflation of 1.83% for Fiscal Year 2017 to material and supply costs.

 - 2. Instructional Assistant** – New full-time teaching assistants will be hired at the rate of \$19.23/hour – S/4, which equates to an annual salary of \$24,772.
- B. Ensure all legal mandates and high school accreditation requirements are met.** – Special education, Section 504 and ADA, English Language Learners, MA Ed Reform Act, NEASC, PARCC and Educator Evaluation.
- C. Ensure professional staffing guidelines are met to address** class size policy, enrollment shifts, and legal needs.
- D. 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 less expensive means of purchasing some products).
- E. 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. **The 5th Utility conundrum must be resolved and an assumption made to fund..**
- F. Professional Development** – Budget requests within per pupil instructional allotments.
- G. 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 17 budget has been developed.
- H. General and Instructional Supplies** – General and Instructional Supply line items will be calculated to reflect October 1, 2015 enrollment numbers, at a per pupil rate of +1.83% over the rate used in determining the FY16 Instructional Allocations.
- I. Projected PK – 6 Consumables** – Using October 1, 2015 enrollment numbers, analyze projected consumable costs for Reading “Foundations”, FOSS Science, and Math In Focus programs. Line item adjustments will be made as necessary for FY 2017 projected costs e.g. change in student performance.
- J. 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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4. User Fees

- A. **HS Athletics** – Until the SC reviews its user fee policy in January, it is understood that Athletics will be offset by an estimated \$256,000 in user fees and \$59,600 in rentals and \$41,000 in gates. User fees are currently set \$380 per student. The family max is currently set at \$760. However, our estimates anticipate a reduction of about twelve thousand five hundred dollars from rentals for two reasons.
 - a. We plan on losing about ten thousand dollars due to the replacement of the track around the turf field this summer (2016). This is an unfortunate loss of revenue but the replacement of the track will provide long term benefits to Andover.
 - b. We have started the process to accept a donation in lieu of payment from Andover Youth Soccer. We have a few soccer nets that are in desperate need of replacement, Youth Soccer has agreed to replace the goals and in return we will credit them the next \$2,500 towards their rental cost.
- B. **HS Parking Fees** –With the reassignment of student parking spaces to meet new staffing needs at the High School, estimated revenue will be budgeted at \$59,000. The parking fee will remain at \$200, unless Administration requests fee adjustments by the School Committee.
- C. **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 \$200 unless otherwise determined by the School Committee.
- D. **Bus Transportation Fees** -Budget bus transportation fee at \$300 with a family maximum of \$600 unless otherwise determined by the School Committee.

5. Contractual Obligations – Transportation

- A. **Regular Education Transportation**–FY 2017 Transportation budget will be developed using year three rates of a three year negotiated contract with Trombly Motor Coach. Final budgeted cost for regular education transportation will be offset by \$365,000 estimated user fees.
- B. **Mid-Day Kindergarten Transportation**- FY 2017 Transportation budget will be developed using year three rates of a three year negotiated contract with Trombly Motor Coach.
- C. **McKinney-Vento Homeless Act**–We budgeted \$10,000 for FY 2016 and were reimbursed the sum of \$2,790 in FY 2014 at the rate of 50.83%. While the reimbursement amount for FY15 will not be available from DESE until all End of Year Reports have been file, DESE has reported that the reimbursement rate will be at 34.4%. At the beginning of FY 2016 we transported three homeless students, up one over FY 2015. We are confident that budgeting \$10,000 for Homeless Transportation for FY 2017 will be adequate to meet the homeless transportation requests.
- D. **Special Education Out-of-District & Summer Transportation**- FY 2017 Transportation budget will be developed using year three rates of a three year negotiated contract with NRT Bus Inc.
- E. We will develop the FY 2017 Out-of-District Sped Transportation Budget, including summer transportation, based on current student population. FY 2017 Transportation budget will be developed using year three rates of a three year negotiated contract with NRT Bus Inc.

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- F. Special Education In-District & Summer Transportation-** We will develop the FY 2017 In-District Sped Transportation Budget, including summer transportation, based on current student population and year three rates of a three year negotiated contract with NRT Bus Inc.
- G. Extracurricular, Field Trips and Athletic Transportation-** Budgets for extracurricular activities requiring transportation services will be based upon year three of a three year negotiated contract with Trombly Motor Coach.

6. Contractual Obligations – FY 16 Salary Projections

- A. Collective bargaining contracts-** Salary projections for all collective bargaining units will be based upon year three of an existing three year agreement. Projections shall include steps, continuing education increment, longevity, and stipends at the negotiated rates.
- B. Individual contracts – (administrators) –** Consistent with settled collective bargaining unit contracts, COLA for individual contracts will be budgeted at +2%.
- C. Substitute Teacher Pay –** We will budget at the current rate of \$75/day.

7. Fixed Costs: Utilities

- 1. **Gas-** Budget based upon Plant & Facilities projections.
- 2. **Oil-** Budget based upon Plant & Facilities projections.
- 3. **Electricity-** Budget based upon Plant & Facilities projections.

8. Fixed Costs: Telephone/Communications – Review and adjust as needed to reflect potential savings related to the new Voice Over Internet Protocol (VOIP) communications system installed during 2014/15.

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

10. Capital Costs – Budgeted in Town Budget

- 1. “CIP” Projects shall be developed in accordance with the Town Manager’s budget calendar, reviewed and approved by the School Committee and included in the Town’s CIP Budget.

11. Unfunded Mandates – 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.

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- 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)** (*Pub. L. No. 93-112, 87 Stat. 394 (Sept. 26, 1973), codified at 29 U.S.C. § 701 et seq.,*) – Budget using the known students at the time of budget submittal.
- b. **English Language Learners** - Budget using the known students at the time of budget submittal. The new regulations call for all teachers to utilize the World Class Instructional Design and Assessment (WIDA) standard. Each school and each teacher has unique needs that must be addressed in the moment. This group of teachers (15) needs program materials at a cost of \$7,500 and professional development for curriculum development during the school year = \$3,500. All local ESL Departments are under a great deal of scrutiny by DESE in applying the WIDA to curriculum, instruction and assessment due to the fact that MA is under an order from the federal SJC to provide for ELLs. Lastly, there will be a cost for districts to meet its RETELL requirements for teachers and administrators beginning on July 1, 2014 which is unknown at this time since DESE has not yet provided this information to superintendents.
- c. **New Educator Evaluation Regulations – CMR 35.00** – Andover implemented the new teacher evaluation system in September 2013 with all staff engaged in the process. As the evaluation process continues and begins to include the impact on student learning, teachers must receive support in planning, gathering evidence, and reporting this data. This carries a budgetary expense of \$6,000 to review and sustain regulation requirements relative to training, reporting licenses, and assessment development (district-determined measures).
- d. **MA Ed Reform Act** – Budget using known students needing MCAS support and remediation or Educational Proficiency Plans (EPP-high school only) at this 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 regulations anticipated for FY 2016.

12. Revenue Items

- 1. **State Aid: Chapter 70** – FY 2016 amount is \$9,191,614. In January 2016 Fiscal Year 2017 Cherry Sheet Receipts for Andover will be released by DOR.
- 2. **State Aid: SPED Circuit Breaker** – FY 2016 Circuit Breaker is \$1,640,484 or 73% of our net eligible claim. We are mindful of the fact that the State may fund approximately 40% of our eligible claim in FY17. However, based upon prior year's CB reimbursement history we will estimate the percentage of our reimbursement to be 72% of our net estimated eligible claim.
- 3. **Special Needs Tuition** – We do offer a SPED vocational program for identified students ages 18-22. We refer to the program as Transitional Opportunities or TOPS. Andover and North Andover currently have students enrolled. A Memorandum of Agreement allows the parties to share the annual staffing and operating costs. We cost share 50/50 the expenses of the TOPs program with North Andover.

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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. However, tuition for the peer partners has not been adjusted in recent years and will be reviewed for a possible increase for FY 2017.

5. **All Day Kindergarten Tuition** – All day kindergarten tuition will be \$4,650 per student for FY 17. Discounts are available for multiple births, unless otherwise determined by the School Committee.

6. **Rental Income** – The Athletic Department generates rental income for the District. This income is part of the gate and rental offset to the Athletic Department Budget. Use of facilities income is also received from income generated by renting space to the Lesley University Graduate Program. The Collins Center is a separate revolving fund which is to be self-sustaining.