

**FY 2019 Budget Questions & Answers for School Department from
Finance Committee**

	Dept. Number, Name + Account	Questioner's Name/Question	Response
1	School Dept Budget Assumptions	FitzPatrick: Is there a chart showing the growth in the percentage of students requiring special education and a comparison of that percentage with other communities?	The Department of Education publishes data comparing the percentage of Special Education expenditures as a percentage of total budget expenditures. The latest data published is FY 2015. During that fiscal year Westford's Special Education expenditure is 17.9% of our total FY 15 budget. The state average for FY 15 was 21.0%. It is difficult to accurately compare actual numbers of students accessing special education services between communities because of the variability in referral, assessment and identification of student needs.
2	School Dept Budget Assumptions	FitzPatrick: When are the new apartment developments expected to impact the schools? Is there an expectation of how many students may be enrolled based on Princeton?	The two largest developments(240 and 180 units) are expected to begin construction this spring(2018). The 240 unit project is estimating a 20 month build schedule with units being occupied February-August 2020. The 180 unit project is estimating a 13 month build schedule with a Fall 2019 occupancy. Both of these major developments will have some impact on the 2019-2020 school year.
3	School Dept Budget Assumptions	FitzPatrick: Why has the number of students requiring outside placement increased?	The number of students requiring services via outside placement can vary from year to year and depends upon the emerging/changing severity of needs of students who are currently in the school system, and students who move to Westford who may also require an outside placement. We make every effort to provide services to students within our school system prior to considering an outside placement. Unfunded obligations to partner with Department of Mental Health and Department of Children & Families as well as provide a range of vocational high school services also impact the number of students who may require out-of-district programming.
4	School Dept Budget Assumptions	FitzPatrick: Is the increase from 2 to 4 years of monitoring ELL students a result of the recently signed law or does that new law have other ELL mandates?	The regulations tend to have adjustments made to them annually. In August a document was released from the State stating that the Former English Learners, who formerly had to be monitored for 2 years, now have to be monitored for 4 years. There are a few other changes as well, such as the cut-off scores on the assessment used to classify English Learners has become more rigorous (i.e. more students who would have previously been able to exit can no longer exit).
5	School Dept Budget Assumptions	FitzPatrick: Is there an analysis that shows if there is a point where	Each year, prior to making a recommendation of school choice openings to the school committee I analyze the grade level enrollments to make sure that any incremental

FY 2019 Budget Questions & Answers for **School Department** from Finance Committee

		additional school choice students impact class size or the need for another class?	enrollment due to school choice does not create the need for an additional classroom. I try to keep the marginal cost associated with each additional school choice student to a minimum.
6	School Dept Budget Assumptions	FitzPatrick: Last year it was mentioned that an analysis of in house bus service costs vs outsourcing busing was going to be done. Are the results of that assessment available?	We hope to be able to complete this study with the assistance of the Mass. Assoc. of Pupil Transportation later this year. Results will be published when available.
7	School Dept Enrollment projections	FitzPatrick: I'm curious why it is projected that most classes will grow except at the highschool level. For example there are 203 6th graders at Stoney. They are next year's 7th graders and are projected at 207 - a growth of 4. In highschool most classes are expected to be less next year. This years 10th grade class will shrink by 7 students. Are there some trends that aren't readily apparent? Are more HS kids requiring outside placement?	In the development of projections, we use George Murray's cohort survival ratios to predict the number of students progressing from one grade to the next. We sometimes lose students between grades at the high school level. With the advancement of programs at Nashoba Tech (and the school's ability to prepare students for college) we are seeing more Westford students considering Nashoba Tech for their high school education.
8	School Dept Budget Assumptions	FitzPatrick: What types of expenses are budgeted in the learning plan since they aren't FTEs.	Assuming your question refers to the Digital Learning Plan, while student Chromebooks for the high school's 1:World program has been placed in the capital budget, we still have to budget for the cases and the management software necessary to protect the students and devices. Also, one of the few new requests we have is a technician assistant because we need additional personnel to support the increasing number of devices that are necessary.
9	School Dept Additional requests	FitzPatrick: How does the verbiage regarding the Grade 1 teacher correlate to page 9 of the detail	The Gr 1 teacher that is a new request in the budget for FY19 is in-place in FY18 due to necessity, but was not included in the budget for FY18. The estimated FY19 cost is not shown in the FY19 column of the detail until the School Committee votes on the Superintendent's recommendations. It is difficult to compare prior year actual costs to future year budget

FY 2019 Budget Questions & Answers for **School Department** from Finance Committee

		budget? I don't see a reduction in the 17 budget?	estimated costs because the personnel may in fact be different and the FTE's may not be the same in all of the comparison years.
10	School Dept 2325	FitzPatrick: Why continually budget substitute teachers so much higher than the actual trend (\$592,000 budget vs less than \$475,000 in actuals)?	One of the Superintendent's proposed budget reductions for FY19 is a \$100,000 reduction in the budget for long-term teacher substitutes. Now that this has been approved by the School Committee (1/8/18), the total in the Teacher Substitutes Function 2325 for FY19 will be reduced from \$591,936 to \$491,936.
11	School Dept 3520	FitzPatrick: What are other student activities?	Other Student Activities, Function 3520, are contractual stipends that are paid to the advisors of the co-curricular after school activities. The net general fund budget amount for FY19 is \$185,012. An additional \$47,482 for the middle schools and \$38,430 for WA will be charged to the participation fees that are collected. These fee offsets are reflected in the detailed spreadsheets to arrive at the net budget request of \$185,012.
12	School Dept 5300	FitzPatrick: What equipment is being leased? Did the schools decide to copy the town and buy their copiers or do they continue to lease them?	The School Department leases copiers through the state contract for this type of equipment. We also lease a postage machine. The only copiers that were purchased for the Schools were acquired as part of construction projects (for example when the new schools were built). Those machines were disposed of many years ago at the end of their useful life (generally about five years), and replaced with leased machines.
13	School Dept Per pupil spend	FitzPatrick: What is believe to be the bases of the difference in insurance, retirement programs and other?	The FY16 Westford per pupil expenditure for "insurance, retirement programs and other" was \$1,824 compared to the State per pupil of \$2,619, a difference of \$795 per pupil. The Westford figure includes health insurance for active and retired school employees, medicare payments for active school employees, a proportionate share of the Town's liability, property, workers compensation, and unemployment insurance, and a proportionate share of the Town's contribution to the Middlesex County Retirement System for school employees excluding those who participate in the Mass. Teachers Retirement System (MTRS). (The Town does not make contributions to MTRS). The Westford figures are provided by Dan O'Donnell for inclusion in the End-of-Year-Report (EOYR). I cannot speak to the exact composition of the figures that make up the State average, but it includes all of these same categories.
14	School Dept - 7 year SPED trend	FitzPatrick: What is meant by # of students who have moved into Westford? Is it fair to say if the growth in Special Education students	At the time the data you reference (Appendix IV) was reported (November 2017) 22 students had moved into Westford who were on an IEP (Individualized Education Plan) in their former school district.

**FY 2019 Budget Questions & Answers for School Department from
Finance Committee**

		most recently is 26, that 22 are new students.	
15	School Dept SPED transportation _	FitzPatrick: How did transportation decrease with more students being transported?	The budget for Special Ed Transportation for FY19 is \$1,027,603, compared to a budget of \$984,400 for FY18. The actual expenditure for FY17 was \$1,038,296. The increase in recent years has been primarily due to the need to contract some of the routes to an outside contractor when we do not have the capacity in-house. Our van lease costs have also increased and we have added a third wheelchair van.
16	School Dept - School Choice	FitzPatrick: I thought the total was 75? Did it decrease?	We have established a ceiling of 75 school choice students Headcount. The actual FTE (Full Time Equivalency) may be less because Kindergarten school choice students are only a .5 FTE. Also, a family will sometimes change their mind and enroll their child in the district in which they live. With the anticipated new residential development, I recommend that we not increase the number of school choice students beyond the current limit of 75.
17	School Dept - Fees	FitzPatrick: Why has it been so long since parking fees were adjusted?	The parking fee for seniors at WA has been \$50 since FY08. The fees can only be used for parking lot operations and maintenance. Most of what is collected each year is used to pay for the crossing guard who directs traffic at arrival and dismissal times, and for a portion of the cost of clearing snow from the parking lot. These costs have not risen substantially in recent years.
18	School Dept - Fees	FitzPatrick: Is there a cost analysis for the early arrival option? It's less than \$1.50 a day/student?	The Early Arrival Option program operates for 1 to 2 hours per day at the elementary schools only. Families pay an annual fee of \$250 for each child who participates. This amount is sufficient to cover the cost of the salaries for those who staff the program.
19	300 – Westford Public Schools	Hegde: I support Superintendent's recommendations to reduce budget, but have two questions: Will there be any impact on quality of education? Any feedback from parents on increased transportation fees?	It is anticipated that the recommended reductions will not negatively impact the quality of education for any student. At the present time there has not been any negative feedback from parents about the proposed increase to the transportation fee. It's important to keep in mind that the school system's general fund appropriation supports approximately 77% of the total cost of regular daily transportation (not including special education transportation), and in fact covers approximately 60% of the cost of ridership for those families who are required to pay the fee.
20	300 – Westford Public Schools	Hegde: Compensation Reserve – What is this for and why such an increase compared to FY18.	The compensation reserve account is much higher at this point in time in the FY19 budget because there are many contracts that are not yet settled for FY18 or FY19. When these contracts are settled, an adjustment will be made to the Compensation Reserve line in both the FY18 and FY19 columns to reflect the reallocation of the appropriate amounts from the

FY 2019 Budget Questions & Answers for **School Department** from Finance Committee

			Compensation Reserve line to the various salary lines throughout the budget. The bottom line totals will not change.
21	300, WPS	Hari: I like a summary of what commitments/services we will shortfall by reducing the budget from proposed level to(+4.5%) to TMR level (+2.43%) and the risks of it.	The reductions we have proposed to the school committee are attached at the end of this document. The major risk associated with the reductions is the greater use of Special Education "Circuit Breaker" reimbursement funds from the "current" year. At the present time the state is reimbursing communities at a rate of 65% of the "Excess Costs". However, with the recent report of stronger than projected state revenues, it is possible that the reimbursement rate might increase thereby reducing the stated risk.
22	300, WPS, (9100-9400)	Hari: Can you explain each of the four categories about why we need to pay other schools? Is Tuition to Private schools Nashoba Tech?	The tuition projection for Westford students attending Nashoba Tech is not in the WPS budget, but is carried as a line item in the Town's budget. There are five categories of out-of-district tuitions in the WPS budget, as follows: <u>Tuition to Other MA Districts (Reg Ed)</u> - for students who attend a non-member vocational school district (not Nashoba Tech). <u>Tuition to Other MA Districts (Sped)</u> - for students who are attending a special needs program in another public school district. <u>Tuition Private Day (Sped)</u> - for placements at private special needs day schools. <u>Tuition Residential (Sped)</u> - for placements at special needs residential schools. <u>Tuition Collaboratives (Sped)</u> - for placements at collaborative special needs public schools. The costs for FY19 are projected based on students who are currently residing in Westford.
23	300, WPS, BLDG, CTR SVC GENL, 524010	Hari: Can you explain this in detail? Across the board, we used less than 50%, in some cases less than 5%	For simplicity, we budget an amount for building maintenance for each building and for systemwide needs in object code 542010 in Function 4220, Maintenance of Buildings. However, during the course of the year as costs are incurred, we charge the cost to the appropriate account within Function 4220 so that we can track by building trade what type of expenditures are being incurred. The totals for each building should therefore be the point of reference when making comparisons. Actual costs have routinely exceeded what is budgeted in this Function.
24	300, WPS, School leadership - building	Hari: Is this for the Millenium Building ? What covers this item?	Function 2210, School Leadership-Building covers the costs of the Principals' Offices for each school, including salaries and expenses. The costs for Central Office Leadership are in Function 1210 (Superintendent), Function 1220 (Asst Superintendent), Function 1410 (Business Office), Function 1420 (Human Resources), Function 1450 (Info Technology), and Function 2100 (Curriculum Directors including Special Ed Director). The costs for the

FY 2019 Budget Questions & Answers for **School Department from
Finance Committee**

			Preschool program at Millennium are shown in the appropriate state functions depending on the category of cost.
25	300 Westford Schools	Galvin: What is the current Teacher to Student Ratio and how many teacher aides are assigned per teacher (on average) ? Is this the same for SPED classes ? If not what is the teacher to pupil ratio and how many aides are assigned to one SPED teacher.	The school committee student teacher ratios are 22:1 at the K-5 level and 25:1 at the Grades 6-12 level. We are at or near these guideline ratios in most grade levels. Regular Education teacher assistants are only assigned at the K-2 level. Each kindergarten classroom has one regular ed teacher assistant. Each K-2 school also has an additional two regular ed teacher assistants, one who assists in all of the Gr 1 classrooms and one who assists in all of the Gr 2 classrooms. The total number of regular ed teacher assistants funded by the operating budget is 13.7 FTE (additional FTE's are funded by various fee accounts.) Special Education TAs are assigned for a variety reasons. On the preschool level, assistance is required in order to maintain an inclusive setting for a group of 3-5 year olds. One:one assistants are assigned when a student's academic, behavioral, medical or mobility needs exceed the capacity of current staffing. When students receive instruction in a small group setting, by a special educator, the number of students cannot exceed nine (9) without assigning a TA (per regulation).
26	300 Westford Schools	Galvin: Who is eligible for mileage in the School system- what is the reimbursement rate – and are what circumstances where mileage reimbursement are authorized ?	Employees who travel between buildings in the same day because of their assigned schedules are eligible for mileage reimbursement at the IRS rate, currently 53.5 cents per mile. This generally pertains to specialist teachers such as music, art, speech therapists and occupational therapists who travel between buildings on a regular basis.
27	300 Westford Schools	Galvin: Describe the position of MCAS aide and define the purpose ?	MCAS aides provide assistance to the principals during standardized testing days in order to fulfill the proctoring needs per the Department of Elementary and Secondary Education guidelines.
28	300 Westford Schools	Galvin: Has any thought been given to consolidating the office operations	Yes - we routinely assess the needs of the positions we have in place. Our Asst. Supt. position is in charge of Curriculum & Instruction. It is its own department, similar to spec. ed., finance,

FY 2019 Budget Questions & Answers for **School Department from
Finance Committee**

		of both the Superintendent and Assistant Superintendent?	<p>building & grounds, etc). This position oversees the process of implementing local policy and federal regulations as they pertain to teaching and learning, along with ensuring that the district is employing best practices which guarantees high-quality education for students. This position also serves as the coordinator for ELL and multiple grants.</p> <p>The Superintendent position ultimately oversees this department, along with <i>all</i> of the other departments so it would not be feasible for that position to take on the duties of Asst. Supt. of Curriculum and Instruction.</p>
29	300 Westford Schools	Galvin: Please explain the increase in item 12231256 General Student Support Arts Academy- listed at 22K ?	<p>12231256-553090, General Supplies, Arts, Academy is part of the per-pupil funds allocation that each principal makes later in the budget process as we get closer to the next school year and have a better ability to project what will be needed in each curriculum area. These allocations have not been made for FY19 at this point in the process, and the amounts shown for each school in these categories for FY19 are placeholders based on what was allocated in FY18. The combined system-wide amount for per-pupil supplies has not been increased since prior to FY07, and the amount is reallocated between schools each year based on enrollment shifts. The overall total in the operating budget is currently \$607,004, with an additional \$33,000 planned to be spent out of revolving accounts and School Choice.</p> <p>The amount spent for Arts General Supplies at WA has been fairly constant in recent years (\$22,252-FY15, \$23,064-FY16, \$22,074-FY17, \$23,000-FY18 & FY19 budget).</p>
30	300 Westford Schools	Galvin: What are Chapter 222 services ?	<p>Chapter 222 Services are educational services that must be provided to students who are suspended from school for a period of time. These services may either be within our school system, or via an outside placement.</p>
31	300 Westford Schools	Galvin: Please explain item 14230352 Sped Equipment Maintenance listed at 20K ?	<p>This account (14230352-524030) covers the cost of maintenance on FM Units that are used by our hearing impaired students. These systems are highly sensitive pieces of equipment which require annual calibration and updates as deemed necessary by independent audiologists.</p>

FY 2019 Budget Questions & Answers for **School Department from
Finance Committee**

32	300 Westford Schools	Galvin: please explain the steady increase in the curriculum directors item under state function (2100) ?	<p>The increase from FY18 budget to FY19 budget is \$900, which is due to an increase in projected contractual longevity payments. FY19 projected salary increases for the 4.5 FTE staff in this Function are included in the Compensation Reserve. A .5 FTE staff position was added in FY16. Other expenditures have remained fairly constant, with the main variable being staff turnover and salary adjustments.</p> <p>FY15 Actual \$375,116 FY16 Actual \$438,137 FY17 Actual \$445,542 FY18 Budget \$464,515 FY19 Budget \$465,415</p>
33	300 Westford Schools	Galvin: Please explain the increase in state function item (2440) other instructional services- increase from 54K to 108K	<p>Function 2440, Other Instructional Services, includes teacher mileage reimbursements, the WA Internship Coordinator, Bridge Program, and Entrepreneurship expenses, Living Lab expenses, 504 Accommodation expenses, and Ch 222 Expenses. The main reason that the FY18 and FY19 budgets are higher than the FY15 to FY17 actuals is that though we incurred expenses in FY17 because of Ch 222 requirements, the cost in that year was reported in the Tuition state function. We continue to budget for this as a placeholder in Function 2440, however, because until the need arises we do not know how the situation will be addressed, with tutoring services or an out-placement being the most likely ways to provide the needed services (see also question 30).</p>
34	300 Westford Schools	Galvin: Please explain accounts 19100352 and 19100392 regarding tuition payments under expenses totaling 34K	<p>19100392-532050 is Tuition to Other MA School Districts, Reg Ed. This is tuition to a vocational school district that we are not a member of for a student who is a Westford resident. The tuition is set by the state and is estimated at \$21,653 for FY19.</p> <p>19100352-532015 is Tuition to Other MA School Districts, Sped. This is tuition for a Westford special needs student who has been placed in a program that is offered by another public school district, not a private school. The cost for FY19 is estimated to be \$30,990. The state requires us to track the tuition expenses separately, by category.</p>

FY 2019 Budget Questions & Answers for **School Department from
Finance Committee**

35	School Dept Assumption	Bao: Pupil/teacher ratio is listed, which suggests about 99 teachers (K to 5) and about 127 teachers (6 to 12). Do we a payroll staff headcount chart, e.g. teacher, non-teacher, etc?	The combined FTE in FY18 of classroom and specialist teachers in Functions 2305, 2310, and 2320 is 401.1 (including all funding sources). The total number of staff is 792.0 FTE (excluding hourly employees). Of this total number, 696.0 FTE are funded by the operating budget and 96.0 FTE are funded by other sources such as fee accounts, grants, school choice and the school lunch revolving account. Of the total 792.0 staff, 648.2 or 82% are charged to instructional state functions. I will develop a chart by type of staff member and funding source that will provide additional detail and distribute that as soon as it is available.
36	School Dept Assumption	Bao: How much was School Choice fund in FY18? How much do we expect to get in FY19?	We are currently expecting to receive \$526,000 in FY18 for 72 FTE incoming school choice students. Of this amount \$360,000 is the maximum regular payment per student at \$5,000 each. An additional \$166,000 is estimated for added costs related to special education costs for some of the students. For FY19 we are assuming that our receipts will be \$375,000, representing \$5,000 for each of 75 incoming students.
37	School Dept Enrollment	Bao: It appears that enrollment peaked 5325 in FY2009. Enrollment went down slightly ever since, to 5116 projected FY19. Do we have a staff headcount per FY?	Please see the answer to question 35 concerning staff FTE's.
38	School Dept Enrollment	Bao: Current level of staffs may not be able to support additional students from new housing developments. Any comment on how we prepare for that, in terms of budgeting?	We are anticipating that the two large apartment complexes near Route 110 will begin to impact our school system in the 2019-2020 school year. I will remain in contact with the agency responsible for the rental process in an effort to assess the staff, transportation, etc. costs
39	School Dept Budget appendices	Bao: School Choice FY2018 has a headcount of 73. Headcount of 11 in Grade 9 appears to be a peak. Do we	The School Choice enrollment in Grades 9 and 10 in FY 19 should range between 7 and 10 students.

FY 2019 Budget Questions & Answers for **School Department from
Finance Committee**

		expect to see a “waterfall”, e.g. relatively high number of headcount in Grade 9 and Grade 10 in FY2019?	
40	School Dept Budget appendices	Bao: I am curious about “Total School Operating Budget” per FY. FY06 to FY15 can be found from “Direct Special Education Expenditures as a Percentage of School Budget”. What about FY16 - FY18, on “Total School Operating Budget”?	The Department of Education has not yet published the data from FY16 to the present time.
41		Kost: To pay for the Facilities Director organization as approved for recommendation by all town and school committees, what would be the next set of changes by the schools to ensure it is in the budget, and what are the implications?	The \$121,705 necessary to fund the Facilities Director and Data Analyst would require us to eliminate some existing staff positions.
42		Kost: Please share the process in which all non-classroom teacher schedules (k-5) are reviewed and verified that a full school day each day is filled with job specific tasks (e.g., technology specialists, library personnel, music and related, etc.) In what way does the school committee review this data to ensure that all	Each year we review the number of classrooms we have throughout the elementary schools and distribute the shared staff accordingly. For example, in 2016 we we reduced 1.8 elementary staff in the visual/performing arts department as a result of reconfiguring their assignments more efficiently. Our director of digital learning meets regularly with the digital learning specialists who have a partially fixed schedule (teaching) and the rest of the time is meant to support/coach teachers. They keep a coaching log which lists the teachers with whom they work (date, time, etc.). Positions such as these are assessed at least annually.

FY 2019 Budget Questions & Answers for **School Department from
Finance Committee**

		non-classroom personnel are engaged properly each day all day? What are the observations from all of this?	
43		Kost: Please share how each school's building maintenance/janitorial staff are evaluated for performance, including not only basic responsibilities, but also maximizing the utility computer programs that have been installed from green energy grants.	Each building principal evaluates the custodians in conformance with the collective bargaining agreement. The district's licensed HVAC technician assists the head custodians in the buildings that have acquired energy management equipment and software in recent years in order to effectively manage the mechanical systems in the schools. As a historical perspective, about 15 years ago we cut 1/3 of our custodial staff, and we equipped the remaining staff with automated equipment. This significantly increased the remaining custodians' productivity. I am proud to continue to say that we have the cleanest schools in the region.
44		Kost: What are the school committee's/superintendent's staff plans to meet the targets for the next 3 years consistent with the current TM's financial model?	Per Town Finance Director Dan O'Donnell, the current financial model for the next 3 years includes increases of 1.75% for the School Department in FY20, 2.0% in FY21 and 2.0% in FY22, with the understanding that these are subject to change. While these percentages are slightly higher than the 1.5% in the model for FY19, it will still be challenging to meet them given what we know of trending costs in both regular education and special education. Each year we will continue to assess the needs of our students and make priority decisions with respect to appropriated funds. With many non-salary indices indexing beyond the 1.75-2.0%, it will be challenging to meet the financial parameters and continue to maintain essential instructional and support services.

Westford Public Schools

Reductions recommended to meet Town Manager's target of \$57,928,362 for FY2019Reductions presented 12-4-17:

Reduce budget for long term substitutes	100,000
Increase bus fee to \$275, with corresponding decrease in transportation budget	100,000
Prepay FY19 out-of-district tuitions at the end of FY18, with reduction in FY2019 tuition budget	370,000
Net reductions in systemwide curriculum budget	<u>70,000</u>
	640,000

Additional reductions presented 12-18-17:

Reduce new request for Technician to Technician Assistant	18,000
Reduce Reading Interventionist hours at Blanchard and Stony Brook	17,000
Eliminate new request for Facility Director and Analyst	121,705
Reduce 0.6 FTE WA Alt Ed staff	32,492
Reduce 2.0 FTE Blanchard Gr 7 mini-team	108,308
Plan to use FY2019 Circuit Breaker receipts in FY2019 instead of reserving for FY2020	<u>363,552</u>
	661,057

Total recommended reductions to meet Town Manager target	<u><u>1,301,057</u></u>
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