

**Andover Public Schools**  
**FY 18 Budget Development Assumptions & Guidelines**  
**Andover School Committee – Approved November 17, 2016**

**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:

- *Special Education: Federal - IDEA & MA General Law 71B & 603 CMR 28.00*
- *Every Student Succeeds Act (ESSA). Previous version of the law-No Child Left Behind (NCLB) Act.*
- *English Language Learners (ELL)*
- *Section 504 and Americans with Disabilities Act (ADA)*
- *MA Education Reform Act of 1993-Provide MCAS support.*
- *Partnership of Assessment Readiness for College and Career (PARCC)*
- *Educator Evaluation System*

**Note: The School Committee will consider separating SCH-3 Textbooks, from the CIP and recommending this budget item for curriculum be submitted as a separate warrant article.** The estimated cost for utilizing a blended environment where text and technology are both necessary and appropriate is \$519,300.

**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 17 budget to the FY 18 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 18 budget appropriation
  - B. Statutory or regulatory mandates and accreditation requirements

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- C. Personnel step, longevity, and collective bargaining increases (including cost of living)
  - D. Increases under other existing contracts e.g. transportation. We publically bid transportation for regular education, mid-day K, SPED in-district, out-of-district, summer and extracurricular.
  - 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
  - G. 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 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. Identification of the district's goals
  - F. Extenuating circumstances for School Committee Consideration

**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.
  - 1. Classroom Teacher - Budget new full-time teachers at M-7 on the FY 2018 Salary Scale.  
Note: The average cost of a new teacher is lower than the average cost of a tenured teacher; budget new full-time teachers at M-7 on the FY 2018 Salary Scale.
  - 2. Instructional Assistant – Budget new full-time teaching assistants at S-4 on the assistant's FY 18 salary schedule.
  - 3. Budget contract settlements for year one
  - 4. Budget for implementation of the new high school schedule
  - 5. Assess implications of expending Circuit Breaker revolving balance to zero
  - 6. Curriculum funding decision-CIP vs. budget. If done as part of the budget, will need budget increase of \$519,300 above and beyond other increases.
  
- 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 that 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

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educational organizational structure; reduce energy consumption; explore less expensive means of purchasing some products).

- E. **Technology** – Budget for SPED adaptive technology not included in the technology CIP.
- 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 and the conversion to digital text subscriptions are not included in schoolhouse accounts as these items are addressed in the Assistant Superintendent’s CIP request.
- H. **General and Instructional Supplies** – General and Instructional Supply line items will be calculated to reflect October 1, 2016 enrollment numbers at the FY 17 per pupil rate.
- I. **Projected PK – 6 Consumables** – Using October 1, 2016 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 2018 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.

**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 \$69,600 in rentals and \$41,000 in gate receipts. User fees are currently set at \$380 per student. The family max is currently set at \$760.
- 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 otherwise determined by the School Committee.
- C. **K-12 Extra-curricular Activities** –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.

**Contractual Obligations – Transportation**

- A. **Regular Education Transportation**–FY 2018 Transportation budget will be based upon our decision to exercise year one of a negotiated two year option to extend our existing with Trombly

**Andover Public Schools**  
**FY 18 Budget Development Assumptions & Guidelines**  
**Andover School Committee – Approved November 17, 2016**

Motor Coach. Final budgeted cost for regular education transportation will be offset by \$365,000 estimated user fees.

- B. **Mid-Day Kindergarten Transportation-** FY 2018 Transportation budget will be based upon our decision to exercise year one of a negotiated two year option to extend our existing contract with Trombly Motor Coach.
- C. **McKinney-Vento Homeless Act**—Over the past few years the number of homeless students transported has varied between 3 – 6 students. Temporary housing has been within the Town of Andover and as far away as Lynn. Our assumption for the FY 18 budget is that level funding at \$18,000 will satisfy projected costs.
- D. **Special Education Out-of-District & Summer Transportation-** FY 2018 Transportation budget will be based upon our current student population and a decision to exercise year one of a negotiated two year option to extend our existing contract with NRT Bus Inc.
- E. **Special Education In-District & Summer Transportation-** We will develop the FY 2018 In-District Sped Transportation Budget, including summer transportation, based upon our current student population and our decision to exercise year one of a negotiated two year option to extend our existing contract with NRT Bus Inc.
- F. **Extracurricular, Field Trips and Athletic Transportation-** Budgets for extracurricular activities requiring transportation services will be based upon our decision to exercise year one of a negotiated two year option to extend our existing contract with Trombly Motor Coach.

**Contractual Obligations – FY 18 Salary Projections**

- A. **Collective bargaining contracts-** Contract negotiations for all APS bargaining units will be coincident with the development of the FY 2018 budget. Therefore, an assumption as to salary projections will be made for all collective bargaining units. 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 an assumed negotiated rate.
- C. **Substitute Teacher Pay –** There are two daily pay rates for substitute teachers. A retired APS teacher is compensated at a daily rate of \$100/day and a substitute teacher is compensated at a daily rate of \$75/day. The amount budgeted shall be based upon maintaining the current rates and prior year usage. Our daily rates are in line with surrounding communities.

**Fixed Costs: Utilities**

- A. **Gas-** Budget based upon Plant & Facilities projections.
- B. **Oil-** Budget based upon Plant & Facilities projections.
- C. **Electricity-** Budget based upon Plant & Facilities projections.
- D. **Telephone/Communications –** Review and adjust as needed to reflect potential savings related to the new Voice Over Internet Protocol (VOIP) communications system.

**Custodial Supplies & Materials** - Budget using historical data and current trends for costs increases.

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**FY 18 Budget Development Assumptions & Guidelines**  
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**Unfunded Mandates – MA**

- A. **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 standards - Each school and each teacher has unique needs that must be addressed in the moment. Providing sufficient dollars for professional development, resources, and programmatic needs ensures that the department is equipped to offer the best in a Sheltered English Immersion Program. The Department of Elementary and Secondary Education expects that the district will adhere to every guideline outlined in the August, 2016, *Guidance on Identification, Assessment, Placement and Reclassification of English Learners*.
- B. **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).
- C. **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).

**Revenue Items**

- A. **State Aid: Chapter 70** – FY 2017 amount is \$9,768,234. In January 2017 Fiscal Year 2018 Cherry Sheet Receipts for Andover will be released by DOR.
- B. **State Aid: SPED Circuit Breaker** – FY 2017 Circuit Breaker is \$1,472,722 or 70% of our net eligible claim. Based upon prior year's CB reimbursement history we will estimate the amount of the FY 18 reimbursement to be \$1,774,566.

**Tuition Based Programs**

- A. **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.
- B. **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 2018.
- C. **All-Day Kindergarten Tuition** – All-day kindergarten tuition will be \$4,650 per student for FY 18, unless otherwise determined by the School Committee. Discounts are available for multiple births, unless otherwise determined by the School Committee.