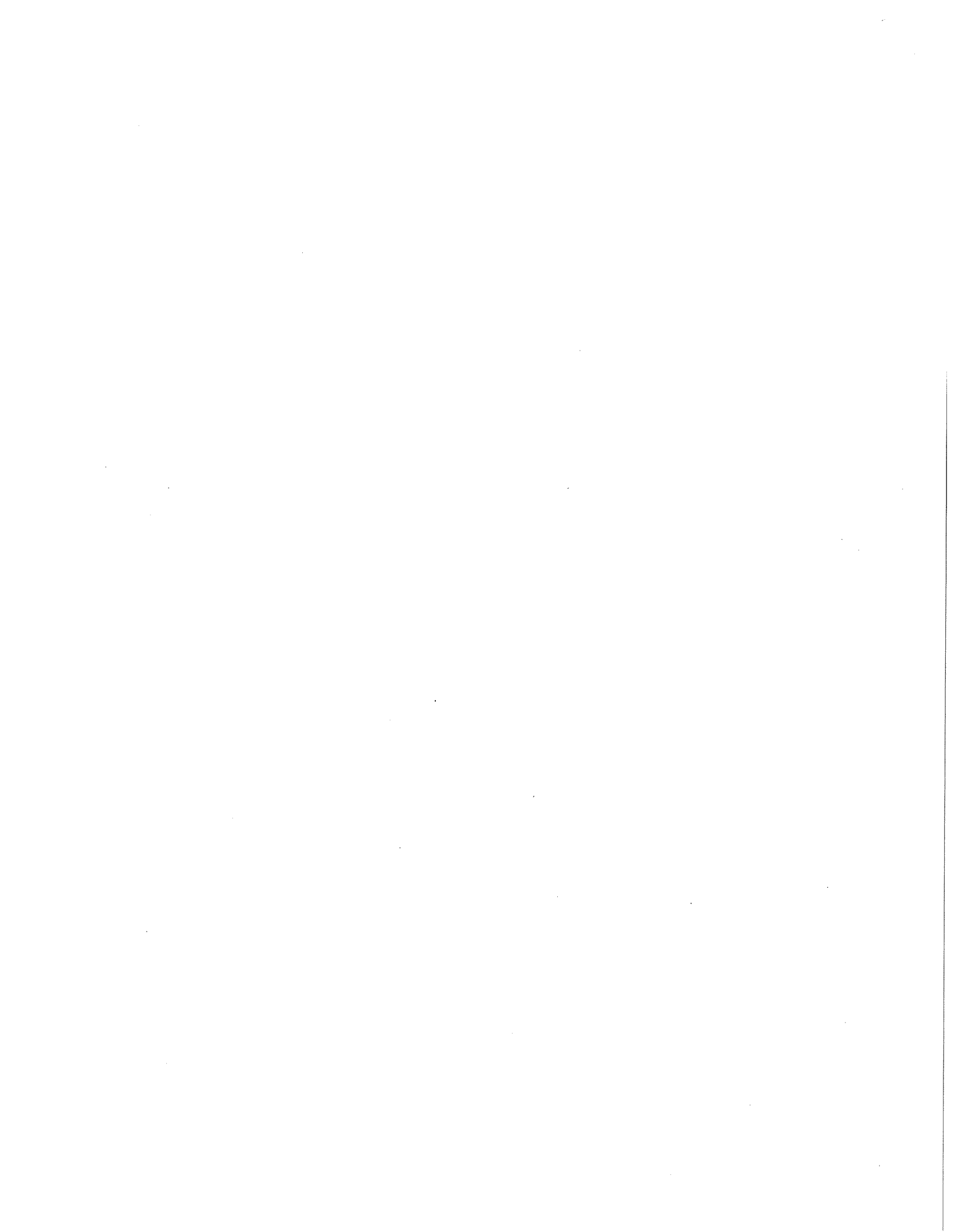


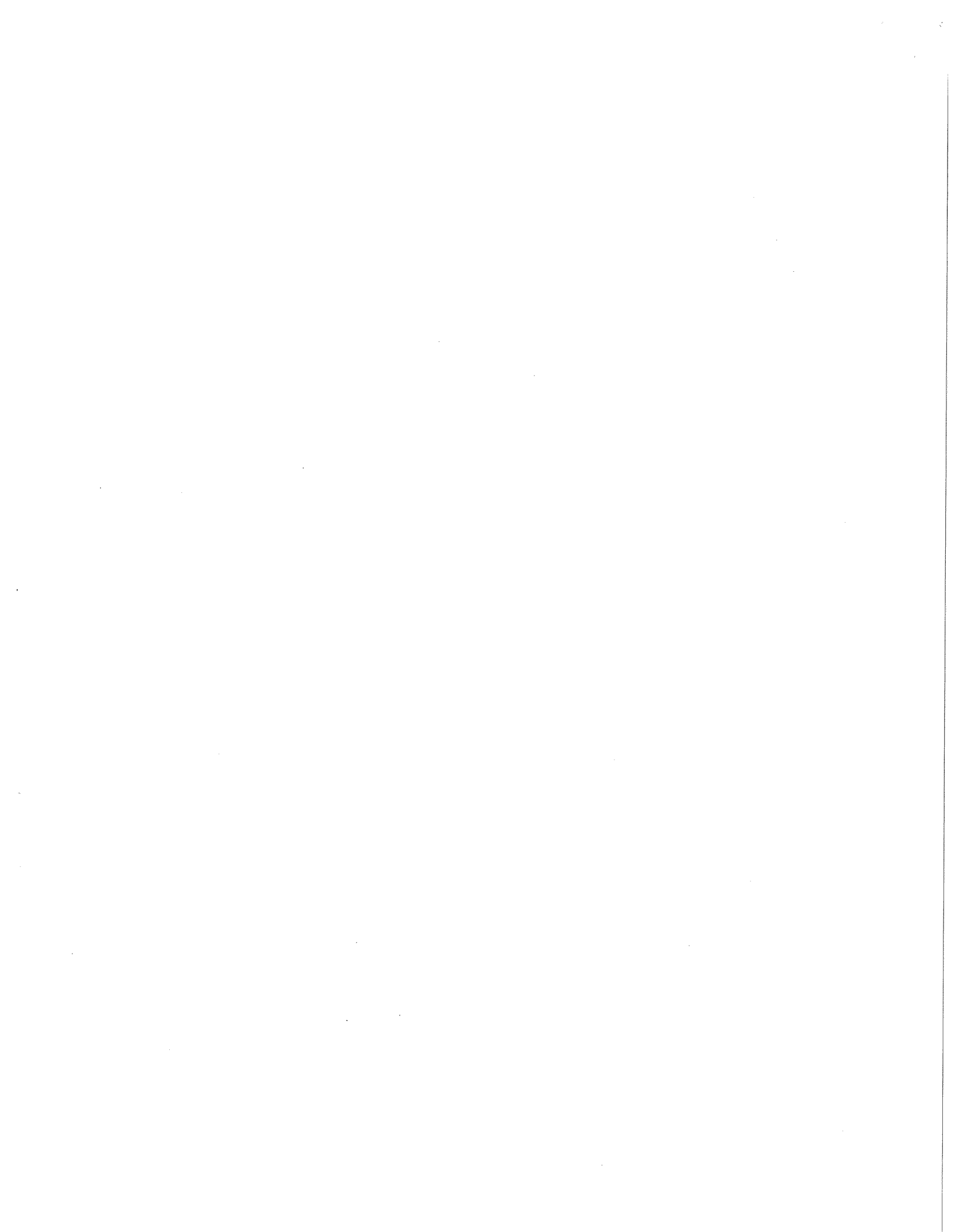


Arlington Public Schools  
Special Town Meeting  
November 15, 2010



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**NOVEMBER 15, 2010**

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*Arlington, Massachusetts 02476-0002*

P.O. Box 167 • 869 Massachusetts Avenue • (781) 316-3540

Office Of The School Committee

November 8, 2010

Dear Town Meeting Colleagues,

We come together once again to grapple with the problem of school finances.

Like most of you, I look at the challenges before us through many lenses:

- As Chair of the Arlington School Committee, I find myself in the uneasy position of asking for your vote to cut the School Department's FY2011 appropriation by over \$1.5 million.
- As a fellow Town Meeting Member, I share your frustration in having to reconvene in November to revisit this issue.
- As a citizen and taxpayer, I want guarantees of responsible stewardship of our public dollars.
- And as the father of two children with many years before them in the Arlington Public Schools, I seek to ensure that my kids and their classmates continue to receive a world-class education, which endures as a proud goal and achievement of our town.

The Finance Committee's recommended vote under **Article 2** asks the Town Meeting to adjust downward the Fiscal Year 2011 appropriation for the School Department. This action is requested in order to fill an end-of-year shortfall in the FY2010 education budget.

Since this budget hole came to light in August, it has been discussed at length in public forums and the media. These reports – and those of two independent auditors and consultants – detail a number of factors contributing to the shortfall. They also explain a number of systemic problems and specific deficiencies, which must be addressed going forward.

The School Committee and Administration spent an inordinate amount of time over the past twelve months preparing for a very difficult Fiscal Year 2011 budget, engaging the public for their input, and supporting the extraordinarily generous efforts of our residents through the Bridge the Gap campaign.

However, in the course of doing so, we took our eye off the accumulating difficulties of FY2010. While much of our attention was focused on external challenges largely outside our control (e.g., reduced state commitments, rapid inflation in key areas of our budget), we did not spend enough time addressing internal challenges (e.g., lack of regular tracking reports, drawdown of revolving account balances, excessive optimism regarding the effectiveness of mid-year cost control measures).

A number of mistakes and misjudgments were made over the course of last year, including late recognition that LABBB revenues would not be forthcoming and misplaced assumptions regarding the application of late-arriving revenues and the booking of "summer salaries."

The biggest frustration, however, revolves around the late communication to the School Committee and others regarding the FY2010 shortfall. In the end, our structural challenges probably made it very difficult to avoid a deficit; our chances of dealing with it more proactively would have increased, though, if we had been provided with earlier notice.

My colleagues and I have strongly expressed our disappointment to the Superintendent and CFO on these points. And to the extent that we as a board should have been more aggressive in demanding answers earlier in the year, I apologize to you and the community.

In the wake of this crisis, the School Committee ordered a full financial operations review by the Massachusetts Association of School Business Officials. The full final report is attached for your reference. It includes 27 top-level recommendations – and numerous additional recommendations – which we intend to reconcile with the seven top-level recommendations of Powers & Sullivan and to pursue aggressively.

This brings us full circle to the business before us on November 15th. Through an exhaustive process of reconciliation between the School Department, the Comptroller, and the Town's auditors, the FY2010 deficit has been identified as \$1,525,021. Thanks to conservative budgeting and improvements in several key revenue streams, the School Department was able to adopt a revised FY2011 budget on October 26, which frees up this amount in order to bring FY2010 back into balance.

Unexpected was the Finance Committee's recommendation of an additional \$177,589 cut to the school budget. While the School Committee has at various times discussed the desirability of building up reserves for unanticipated events, we have not as of this writing discussed the service impact of the recommended mid-year cut. We expect to have a fuller analysis by the time Town Meeting convenes.

While the FY2010 shortfall has precipitated this Special Town Meeting, there are several other articles, which are of interest to the School Committee.

**Article 3** was placed on the warrant at the request of the Thompson School Building Committee and represents a good faith effort to pursue one of three options under consideration for the Thompson rebuild/renovation project. It must be emphasized that authorization of the described land swap by Town Meeting at this stage simply keeps this option alive as the Town makes its case to the Massachusetts School Building Authority for state reimbursement of this important project. As we continue along the path of fulfilling our

our promise to rebuild or renovate all seven of our elementary schools, any option that is ultimately recommended regarding Thompson will be pursued in full consultation with all relevant local officials, boards and committees, as well as Town Meeting.

**Article 4** concerns the accelerated appropriation of funds for Stratton School renovations and involves no additional expenditure in Fiscal Year 2011. An affirmative vote on the Finance Committee recommendation will allow for the pursuit of contractor bids in the spring and enable us to continue work this summer on improvements to our recently designated United States Department of Education Blue Ribbon School.

The School Committee has taken no votes concerning **Article 5**. Like other officials, though, we have recognized the strain that has been placed on all of our municipal budgets by rapid health care inflation. As of this writing, we are diligently pursuing a good faith bargaining effort with our employee unions on an employment and compensation package, an essential component of the broader initiative to find a fair and equitable solution to our health cost challenge.

The School Committee has likewise taken no official position on **Article 6**. That said, I would like to acknowledge the efforts of the article's proponents, who have shown themselves on many occasions to be steadfast supporters of our public schools.

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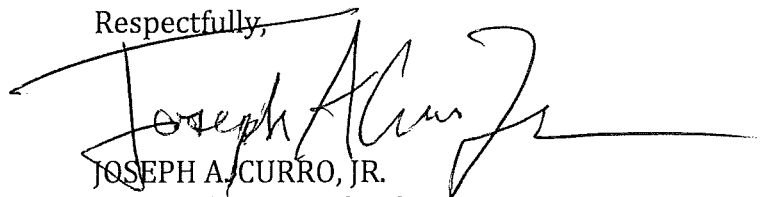
These are difficult times. This Special Town Meeting underscores that simple fact.

Despite the difficulties, though, I am proud of the many accomplishments of the Arlington Public Schools and its talented staff and students.

I am likewise proud to be a member of a Town Meeting, which has shown its commitment again and again to facing down our challenges and helping us to secure the excellence of our schools and our community.

Thank you.

Respectfully,

A handwritten signature in black ink, appearing to read "Joseph A. Curro, Jr.", written over a horizontal line.

JOSEPH A. CURRO, JR.  
Chair, Arlington School Committee  
Town Meeting Member, Precinct 15





# ARLINGTON PUBLIC SCHOOLS



Office of the Superintendent  
Arlington High School  
P. O. Box 167  
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November 8, 2010

Dear Town Meeting Members,

On November 15, the School Committee will ask you to vote to reduce the School Department's FY 2011 appropriation by \$1,525,021 in order to balance the shortfall in the FY 2010 education budget. The deficit resulted from a combination of lost revenue and increased costs. The grants, fees, and credits that were anticipated in the FY2010 budget did not come in as forecast. Additionally, we experienced significant increased expenses in special education, particularly for out-of-district placements. We did not have reserves in the School Department budget to offset the combination of reduced revenues and increased expenses, nor were the cost reduction measures implemented in October 2009 sufficient to offset the shortfall.

Over the course of the five year plan (FY2010 was the sixth year of that plan), the School Department increasingly relied on funding sources other than the town's appropriation to balance the annual increases to the budget. While these funding sources had remained fairly stable over prior years, they were adversely affected by the economic downturn last year.

### **Why didn't the School Department respond earlier in the year to the revenue shortfall?**

Early in the fall, the School Department instituted a budget freeze after we became aware that expected grant revenues were less than anticipated. However, the School Department's method for reconciling and tracking non-general fund revenue and expenses, while adequate for many years when reserves existed, was inadequate to providing the information necessary to make accurate mid-year budget corrections. Without a system that tracks all aspects of the budget monthly, the full effect of the cost saving measures was not known until June.

### **Will the proposed \$1.5 million reduction impact staffing and services in the 2010-2011 school year?**

We will maintain the staffing and services voted by the School Committee and approved by Town Meeting last spring, as well as the positions realized through Bridge The Gap fund raising efforts. However, the School Department sustained a \$3.9 million budget reduction this year that impacts all aspects of the district's ability to provide a quality educational experience for all students. Class size averages have increased. There are class sizes in the high 20's at all levels. Course offerings have been reduced. Textbooks and materials are inadequately funded. Support

services and professional development have been reduced. If some or all of the \$1.5 million was available for the School Department use, the impact of some of the budget reductions could be addressed.

**Will we experience another shortfall this year?**

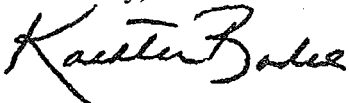
It is possible that we will as there are no guarantees on either the revenue or the expense side of the budget. With respect to FY11 revenue, we have confirmed numbers for all of our grants, which in the aggregate are higher than anticipated in the budget. Grant information is available in budget documents contained in this report. Revenue from fees will be tracked throughout the year and reported on an on-going basis. With respect to expenses, we will continue to track actual costs to budget.

While we cannot promise no budget shortfalls, we can promise that we will know sooner than June given the new budget tracking system and monthly budget reports that have been implemented this year. The new tracking system will not solve the problem of lost revenue or large unexpected expenses, but it will give us the opportunity to make decisions earlier and to involve the town in trouble-shooting fiscal challenges.

Going forward, we anticipate implementing other system improvements that were suggested in the process audit report from the Massachusetts Association of School Business Officials (MASBO). MASBO was hired by the School Committee this fall to analyze our business office operations and to make suggestions about how to improve our systems in general. The complete report is included in your packet. Similar system deficiencies and suggestions for improvement are echoed in the audit report from Powers and Sullivan. A list of recommendations from the MASBO report is provided in this budget book along with action comments.

I regret that we did not have a clearer view of the FY2010 budget at an earlier point last year so that corrective action could have been taken then and not this November. I am personally committed to implementing changes to our budget and reporting system to avoid a similar situation in the future.

Sincerely,



Kathleen Bodie, Ed.D

Superintendent of Schools



*Arlington Public Schools*  
*Business Office*  
*869 Massachusetts Avenue*  
*Arlington, Massachusetts 02476*  
*Telephone 781-316-3511*

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Diane Fisk Johnson, Chief Financial Officer  
djohanson@arlington.k12.ma.us

November 5, 2010

Town Meeting Members, Town of Arlington

Dear Friends:

I would like explain why the School Department ran a budget deficit in FY10, what steps have been taken to correct the FY11 Budget, and how we will prevent this situation from reoccurring in the future.

The FY10 Budget had been built to rely on funding sources which had been relatively stable in prior years, but were greatly reduced in FY10. At the same time, Special Education tuition and other costs rose sharply in FY10. Cost reduction measures were implemented early in FY10 to help counter these problems. Had either Special Education held to budget projections OR revenue materialized as budgeted, the School Department budget probably could have sustained itself with the cost reduction measures taken during the year. However, the double impact of increased, mandated expenses coupled with revenue loss was more than could be born without running into deficit.

Recognizing the full scope of this problem was made more difficult by financial tracking systems which had evolved during times of revenue stability and cash reserves. While these systems had served well for many years, they were not adequate tools for monitoring a budget with so much uncertainty and so little reserve funding.

In order to prevent a recurrence of the deficit FY10, a number of measures have been put into place.

- Monthly financial reports will now show both expense and revenue actuals and projections.
- Expenditures to be funded from grants will now be expensed to the grants throughout the year, rather than carried in the Town Appropriation until year end, as had been the prior practice.
- Staffing will be monitored and tracked through identification of both funded positions and individual salaries, rather than simply by individuals as had been the prior practice. The use of position control will help the School Department manage both high turnover and frequent reallocation of position resources without losing track of our bottom line salary liability.

While these measures will go a long way to provide early detection of any potential problems, the fundamental volatility of Special Education remains a threat to any school budget. Steps should



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Diane Fisk Johnson, Chief Financial Officer  
djohanson@arlington.k12.ma.us

be taken to build up a Special Education reserve account, to protect against drastic, unforeseen increases in any given year. In years when Special Education tuition expenses are below budget, these savings should be used to replenish or increase the reserve account. Based on FY10, when out of district Special Education tuition rose roughly \$800,000 above budget, I believe our target amount for a Special Education reserve should be \$1,000,000.

When the FY11 Budget process began last fall, much of the revenue loss for FY10 had become apparent. Given the reductions known at the time, the prudent choice was to budget conservatively for FY11 in the face of so much uncertainty. This conservative view of revenue created a gap between the level service school budget and the estimated funding of 4.4 million dollars. Through \$500,000 in increased fees and \$3.9 million in direct service cuts, the School Department budget of March, 2010 was on more stable financial footing, although at great cost to the students.

Since the budget vote of March, 2010, a number of funding factors changed. The Town increased its contribution to the Schools by \$142,000. The Bridge the Gap campaign contributed nearly \$600,000 to restore lost services. Additional Federal stimulus money was granted in August. Grants, Circuit Breaker and other revenues all increased in aggregate above what was originally budgeted. In total, funding has increased by \$2,302,610. It is this revenue increase that allows the School Department to return the deficit amount of \$1,525,021 to the Town while still increasing the School Budget by \$777,589 (the majority of this increase is Bridge the Gap). The details of these revenue sources can be found on the "FY10 Budget & Actual Revenue, FY11 Budgeted Revenue" document.

It is important to note, however, that even with this increase to the bottom line; the School Department is still providing 3.1 million dollars less in services to the students of Arlington in FY11 than it did in FY10.

Respectfully Submitted,

A handwritten signature in cursive script that reads "Diane Fisk Johnson".

# Arlington Public Schools ~ FY10 Budget & Actual Revenue, FY11 Budgeted Revenue

FY10 Budget    FY10 Actuals    FY10 Actuals less Budget    FY11 Adopted Budget May, 2010    FY11 Adopted Budget October, 2010    Changes in FY11 Budget    Certainty of Funding

## AMERICAN RECOVERY & REINVESTMENT ACT

State Fiscal Stabilization Fund (SFSF)	\$914,028	\$938,832	\$24,804	\$0	\$35,604	\$35,604	Confirmed
Individuals with Disabilities Education Act (IDEA)	\$749,327	\$1,081,232	\$331,905	\$359,964	\$359,964	\$0	Confirmed
Early Childhood ARRA - 762	\$0	\$28,059	\$28,059	\$0	\$28,059	\$28,059	Confirmed
Jobs Bill	\$0	\$0	\$0	\$0	\$490,929	\$490,929	Confirmed
<b>Subtotal ARRA</b>	<b>\$1,663,355</b>	<b>\$2,048,123</b>	<b>\$384,768</b>	<b>\$359,964</b>	<b>\$914,556</b>	<b>\$554,592</b>	

## GRANT REVENUE ASSUMPTIONS

METCO	\$499,879	\$428,665	(\$71,214)	\$382,737	\$409,460	\$26,723	Confirmed
Title 1 (net)	\$304,658	\$184,232	(\$120,426)	\$160,202	\$174,393	\$14,191	Confirmed
Kindergarten Grant	\$324,075	\$301,440	(\$22,635)	\$269,143	\$255,200	(\$13,943)	Confirmed
Title 2A net (Prof Development)	\$95,751	\$123,730	\$27,979	\$110,473	\$94,779	(\$15,694)	Confirmed
Title 3 (ELL)	\$40,741	\$45,525	\$4,784	\$40,558	\$41,563	\$1,005	Confirmed
Sped Early Childhood - 262	\$40,911	\$40,938	\$27	\$36,552	\$40,951	\$4,399	Confirmed
Title 4 (safe schools)	\$16,480	\$12,921	(\$3,559)	\$11,537	\$4,910	(\$6,627)	Confirmed
Academic support	\$0	\$13,100	\$13,100	\$11,696	\$14,200	\$2,504	Pending
Title 5	\$0	\$0	\$0	\$0	\$0	\$0	
Title 2d	\$3,817	\$3,492	(\$325)	\$3,118	\$0	(\$3,118)	Confirmed
Sped 94 - 142	\$1,225,033	\$1,302,225	\$77,192	\$1,162,701	\$1,310,164	\$147,463	Confirmed
Sped Program Improvement -274	\$27,211	\$4,020	(\$23,191)	\$0	\$0	\$0	
Teaching American History	\$0	\$0	\$0	\$0	\$43,000	\$43,000	Confirmed
Verizon Grant	\$0	\$0	\$0	\$0	\$10,000	\$10,000	Confirmed
Mandarin Language Grant	\$0	\$0	\$0	\$0	\$15,000	\$15,000	Confirmed
Grants to be determined	\$100,000	\$0	(\$100,000)	\$0	\$0	\$0	
<b>Subtotal Grant Revenues</b>	<b>\$2,678,556</b>	<b>\$2,450,288</b>	<b>(\$218,268)</b>	<b>\$2,188,716</b>	<b>\$2,413,620</b>	<b>\$224,904</b>	

## FEES/REVENUE/OFFSETS

Circuit breaker	\$1,319,500	\$905,619	(\$413,881)	\$700,000	\$1,010,819	\$310,819	Confirmed
Full day kindergarten tuition	\$766,500	\$805,536	\$39,036	\$970,000	\$970,000	\$0	Tracking on target
4 Sped Tuition In (Payments from other Districts)	\$525,000	\$13,084	(\$511,916)	\$300,000	\$635,000	\$335,000	~200k to date
Custodial/Maint grey bills	\$75,000	\$56,000	(\$19,000)	\$55,000	\$55,000	\$0	Tracking on target
3 Athletic fees	\$178,550	\$229,997	\$51,447	\$450,000	\$430,000	(\$20,000)	Tracking on target
Peirce field rental fees	\$10,000	\$28,425	\$18,425	\$18,000	\$18,000	\$0	Tracking on target
Instrumental music fees	\$120,000	\$135,712	\$15,712	\$130,000	\$130,000	\$0	Tracking on target

# Arlington Public Schools ~ FY10 Budget & Actual Revenue, FY11 Budgeted Revenue

	FY10 Budget		FY10 Actuals		FY10 Actuals less Budget		FY11 Adopted Budget May, 2010		FY11 Adopted Budget October, 2010		Changes in FY11 Budget		Certainty of Funding
Building rental fees	\$315,000	\$356,754	\$41,754	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$0	\$0	\$0	Tracking on target	
Traffic Supervisor Rebilling	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$15,298	\$15,298	\$15,298	\$0	Confirmed	
Athletic tickets sales/donations	\$17,500	\$4,776	(\$12,724)	\$4,000	\$4,000	\$4,000	\$4,000	\$140,000	\$140,000	\$140,000	\$0	Tracking on target	
Integrated PreSchool Fees	\$15,000	\$0	(\$15,000)	\$0	\$0	\$0	\$25,000	\$25,000	\$25,000	\$25,000	\$0	Tracking on target	
Bishop bus fees	\$16,000	\$19,406	\$3,406	\$12,701	\$12,701	\$12,701	\$12,701	\$12,701	\$12,701	\$12,701	\$0	Confirmed	
AEA offset (20% Salary Offset)	\$12,700	\$12,701	\$1	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$0	Pending	
LABBB distribution & tuition credit	\$450,000	\$0	(\$450,000)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Lunch program offset	\$150,000	\$0	(\$150,000)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
SPED Cost Savings Initiative	\$400,000	\$0	(\$400,000)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Custodial Savings	\$75,000	\$0	(\$75,000)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Bridge the Gap Funding, part 1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$483,800	\$483,800	\$483,800	\$0	Confirmed	
Bridge the Gap Funding, part 2	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100,000	\$100,000	\$100,000	\$0	Confirmed	
Bridge the Gap Funding, part 3	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$16,197	\$16,197	\$16,197	\$0	Confirmed	
Foreign students F-1 Visas	\$100,000	\$227,339	\$127,339	\$160,000	\$160,000	\$160,000	\$160,000	\$160,000	\$160,000	\$160,000	\$0	Tracking on target	
<b>Subtotal Fees/Offsets</b>	<b>\$4,545,750</b>	<b>\$2,795,349</b>	<b>(\$1,750,401)</b>	<b>\$3,224,701</b>	<b>\$3,224,701</b>	<b>\$3,224,701</b>	<b>\$4,605,815</b>	<b>\$4,605,815</b>	<b>\$1,381,114</b>	<b>\$1,381,114</b>	<b>\$0</b>		

<b>TOTAL TOWN CONTRIBUTION (see note 5)</b>	<b>\$36,767,241</b>	<b>\$36,767,241</b>	<b>\$0</b>	<b>\$38,591,451</b>	<b>\$37,066,430</b>	<b>(\$1,525,021)</b>
<b>SCHOOL DEPARTMENT DEFICIT</b>	<b>\$0</b>	<b>\$1,525,021</b>	<b>\$1,525,021</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>AMERICAN RECOVERY &amp; INVESTMENT ACT</b>	<b>\$1,663,355</b>	<b>\$2,048,123</b>	<b>\$384,768</b>	<b>\$359,964</b>	<b>\$914,556</b>	<b>\$554,592</b>
<b>TOTAL GRANT REVENUES</b>	<b>\$2,678,556</b>	<b>\$2,460,288</b>	<b>(\$218,268)</b>	<b>\$2,188,716</b>	<b>\$2,413,620</b>	<b>\$224,904</b>
<b>TOTAL FEES/OFFSETS</b>	<b>\$4,545,750</b>	<b>\$2,795,349</b>	<b>(\$1,750,401)</b>	<b>\$3,224,701</b>	<b>\$4,605,815</b>	<b>\$1,381,114</b>
<b>TOTAL BUDGET ALL SOURCES</b>	<b>\$45,654,902</b>	<b>\$45,596,022</b>	<b>(\$58,880)</b>	<b>\$44,364,832</b>	<b>\$45,000,421</b>	<b>\$635,589</b>

<b>1 TOWN CONTRIBUTION, SCHOOL COMMITTEE VOTES OF MARCH AND OCTOBER, 2010</b>	<b>\$38,449,451</b>	<b>\$37,066,430</b>	<b>(\$1,383,021)</b>
<b>TOTAL BUDGET ALL SOURCES, SCHOOL COMMITTEE VOTES OF MARCH AND OCTOBER, 2010</b>	<b>\$44,222,832</b>	<b>\$45,000,421</b>	<b>\$777,589</b>

**NOTES:**

- 1) The School Department voted a total budget of \$44,222,832 in March, lower than the Town Appropriation by \$142,000. In all School Department documents, other than this one, the School Committee March amount is used for the Original FY11 Budget.
- 2) The Jobs Bill enabled the School Department to retain 8 positions that would have been lost to restore the deficit amount.
- 3) The reduction to Athletic Fees is compensated by the \$20,000 of Bridge the Gap funding for that purpose.
- 4) \$335,000 of tuition for group home students is owed to us from FY10. \$194,000 was received in July, too late to be used to offset the FY10 deficit. The amount owed from FY10, collected and not yet collected, has been moved into FY11 and added to our original budget estimate of \$300,000.
- 5) The Town Contribution amount of Adopted Budget October does not reflect the Financial Committee's recommended vote of 11/3/10. Finance Committee recommended vote is \$36,888,841.

B

Arlington Public Schools  
 Budget Summary by Cost Center  
 Highlighting Comparisons of FY11 Budgets from March and October, 2010

This view allows us to see expenses summarized by school or department.

Cost Center	CC Descr	March Vote Budget	October Vote Budget	Budget Changes
1	High School	6,878,944	7,070,228	191,285
3	Ottoson	4,901,417	5,041,379	139,961
6	Bishop	1,806,403	1,826,622	20,218
9	Brackett	1,755,905	1,831,456	75,551
12	Dallin	1,830,568	1,778,477	(52,091)
15	Hardy	1,530,638	1,439,358	(91,280)
18	Peirce	1,503,846	1,522,632	18,787
21	Stratton	1,582,676	1,550,460	(32,216)
24	Thompson	1,545,669	1,490,598	(55,070)
25	Early Childhood	545,999	573,199	27,200
29	Elementary Systemwide	1,184,378	1,362,148	177,770
30	English	69,477	69,477	-
33	ELL	87,458	87,458	-
36	Health & Wellness	81,705	81,705	-
39	Math	45,000	32,600	(12,400)
42	Science	45,000	44,000	(1,000)
45	Sped	8,631,472	8,778,911	147,439
48	Social Studies	69,478	86,848	17,370
49	Systemwide Accounts	2,634,698	2,662,741	28,043
51	World Languages	14,668	14,668	-
57	School Committee	54,688	66,201	11,513
60	Superintendent	833,601	833,601	-
63	Assistant Superintendent	108,912	108,912	-
66	Business Office	345,888	345,888	-
69	Payroll	261,845	261,845	-
72	Food Services	20,000	20,000	-
75	Facilities	2,618,078	2,738,809	120,731
78	Information Technology	182,692	182,692	-
81	Transportation	1,346,638	1,086,473	(260,165)
85	SPED SLC A	801,799	880,804	79,005
86	SPED SLC B	517,769	733,885	216,116
87	SPED SLC C	385,525	396,349	10,824
Grand Total		44,222,832	45,000,421	777,589

C

Arlington Public Schools  
Budget Summary by Program  
Highlighting Comparisons of FY11 Budgets from March and October, 2010

This program based view of the budget looks at different educational initiatives separately.

Program Description	March Vote Budget	October Vote Budget	Budget Changes
6503 - Kindergarten	1,321,661	1,309,095	(12,566)
6506 - Elementary Education	5,423,805	5,495,172	71,367
6507 - Secondary Education	81,908	174,888	92,980
6509 - Gifted & Talented	-	28,318	28,318
6512 - ELL	316,654	343,583	26,929
6515 - English/Language Arts	1,229,515	1,247,570	18,055
6518 - Family and Consumer Science	260,205	272,886	12,682
6521 - Math	1,175,411	1,259,152	83,741
6524 - Science	1,251,312	1,225,853	(25,459)
6527 - Social Studies	1,094,024	1,088,053	(5,971)
6533 - World Languages	762,286	878,803	116,517
6536 - Art	411,983	491,305	79,322
6539 - Music	583,410	658,398	74,989
6542 - Instrumental Music	132,679	132,679	-
6548 - Physical Education	610,955	678,906	67,951
6551 - Technology Educational (Tech Ed)	128,889	135,072	6,183
6554 - Health Services/Nursing	575,653	546,101	(29,552)
6557 - Guidance	541,714	536,049	(5,665)
6560 - Guidance - METCO	104,701	130,067	25,366
6563 - Library/Media	40,609	149,711	109,102
6566 - Management and Supervision - Principals	1,855,738	1,887,433	31,695
6569 - Management and Supervision-HS Dean	210,732	210,732	-
6575 - Professional Development	299,427	260,784	(38,643)
6578 - Math Interventions	-	16,230	16,230
6581 - Reading Interventions	906,933	897,454	(9,479)
6584 - Summer Programs	10,500	15,000	4,500
6587 - Extended Day	13,000	26,000	13,000
6620 - Athletics Admin	497,991	497,991	-
6700 - C & I Leadership	675,227	591,258	(83,968)
6705 - C&I ELL	90,783	92,208	1,425
6710 - C&I Health/Wellness	68,920	70,345	1,425
6715 - C&I Science	68,275	77,250	8,975
6720 - C&I Math	51,650	42,100	(9,550)
6725 - C&I Family Science	16,110	16,110	-
6730 - C&I World Languages	17,993	24,418	6,425
6740 - C&I English	76,127	78,977	2,850
6745 - C&I Social Studies	76,128	117,348	41,220
6755 - C&I Performing Art	3,325	4,750	1,425
6760 - C&I Reading	168,596	168,596	-
6800 - PK - SPED	366,624	199,581	(167,043)
6803 - Pupil Services (504)	-	15,586	15,586
6806 - Sped Admin/Management Services	361,620	470,073	108,453
6809 - SPED Teacher	1,522,735	1,479,051	(43,684)
6812 - OT/PT	383,557	383,557	(0)
6815 - Alternative Program	125,364	125,364	-
6818 - Speech/Language	533,318	484,882	(48,436)



C

Arlington Public Schools  
Budget Summary by Program  
Highlighting Comparisons of FY11 Budgets from March and October, 2010

Program Description	March Vote Budget	October Vote Budget	Budget Changes
6821 - Behavioral Support	276,000	289,800	13,800
6824 - Inclusion Support	724,749	615,647	(109,102)
6827 - Self-Contained Academic Instruction	1,082,795	1,274,740	191,945
6833 - Social Workers	481,610	524,692	43,082
6836 - Psychologists	146,628	281,970	135,342
6839 - Team Chairs	465,089	523,355	58,266
6842 - Adaptive Techology	15,050	21,500	6,450
6845 - One to One Assistance	140,274	155,860	15,586
6848 - Out of district tuition Day Students	6,000,000	6,000,000	-
6857 - SPED contracted Service	1,184,844	1,184,844	-
6860 - SPED testing and assessment	7,525	10,750	3,225
6863 - SPED Curriculum	8,064	31,098	23,034
6866 - Legal Services Special Education	200,000	200,000	-
6900 - School Committee	54,688	66,201	11,513
6905 - Legal Services School Committee	500,000	500,000	-
6910 - Superintendent	504,031	547,424	43,393
6915 - Assistant Superintendent	138,912	138,912	-
6920 - Business Office	628,340	405,097	(223,243)
6925 - Payroll	261,845	261,845	-
6930 - Grants Development	39,690	38,000	(1,690)
6940 - Information Technology	434,004	434,004	-
6950 - Food Services	20,000	20,000	-
6955 - Traffic Supervisors	-	73,666	73,666
6960 - Facilities Maintenance	3,360,244	3,477,898	117,654
6965 - Custodial Services	1,414,499	1,417,576	3,077
6970 - Transportation Regular Ed	108,400	98,235	(10,165)
6975 - Transportation Special Ed In District	1,138,238	913,238	(225,000)
6985 - Transportation Athletics Boys	15,000	15,000	-
6986 - Athletics Transportation Girls	10,000	10,000	-
6990 - Transporation Homeless	100,000	75,000	(25,000)
6998 - Systemwide Expense	314,269	359,330	45,061
<b>Grand Total</b>	<b>44,222,832</b>	<b>45,000,421</b>	<b>777,589</b>

Arlington Public Schools  
Budget Summary by Object  
Highlighting Comparisons of FY11 Budgets from March and October, 2010

D

This Object based view allows us to look at different types of expenses together.

Object Description	March Vote Budget	October Vote Budget	Budget Changes
81111 - Administration Salaries & Wages	2,836,140	2,852,624	16,484
81112 - Teacher Salaries & Wages	20,049,513	20,871,704	822,191
81113 - Custodial Salaries & Wages	1,323,576	1,323,576	0
81114 - Food Service Salaries & Wages	147,330	147,330	-
81115 - Clerical Salaries & Wages	1,167,681	1,215,188	47,507
81116 - Full/Time Teacher Aides Salaries & Wages	1,923,847	2,067,441	143,594
81117 - Other Full-time Salaries & Wages	1,394,164	1,336,281	(57,883)
81118 - Part Time Salaries & Wages	-	73,666	73,666
81201 - Temporary Salaries & Wages Professional	619,786	636,786	17,000
81203 - Substitute Teachers Day - to- Day	235,000	176,517	(58,483)
81204 - Extended Term Sub Teacher	37,890	97,287	59,397
81301 - Overtime/Peakload Requirement	50,000	50,000	-
81302 - Snow/Ice Removal Custodial	175,000	175,000	-
81304 - Maintenance Salaries	547,199	471,074	(76,125)
81305 - Night Watch	18,000	18,000	-
81308 - Out of Classification Salary	18,000	18,000	-
81313 - Auto Allowance	1,000	1,000	-
81730 - Pensions	50,000	50,000	-
81731 - MTRB Pension	109,079	154,140	45,061
81760 - Clothing Allowance	18,600	18,600	-
81765 - Auto/cellphone Allowance	15,190	15,190	-
82102 - Fuel	100,000	100,000	-
82103 - Power/Electricity	1,134,998	1,150,000	15,002
82104 - Natural Gas	792,803	884,309	91,506
82403 - Plumbing Services	52,000	52,000	-
82408 - Electrical Services	14,000	14,000	-
82409 - Grounds//Supplies	96,154	100,000	3,846
82412 - HVAC Contracted Services	80,000	80,000	-
82420 - Elevator Maintenance/Repairs	12,500	12,500	-
82904 - Custodial Supplies/Cleaning Services	76,923	80,000	3,077
82999 - Miscellaneous Maint Services	249,077	256,000	6,923
83101 - Professional & Tech Services	1,716,030	1,693,674	(22,356)
83102 - Legal Services	500,000	500,000	-
83201 - Tuition to Other Schools	6,015,000	6,015,000	-
83301 - Contracted Transportation to and From School	1,195,094	945,094	(250,000)
83302 - Field Trips (including expenses)	5,250	2,585	(2,665)
83402 - Telephone/pagers	24,038	24,038	-
83403 - Advertising	30,000	30,000	-
83404 - Reproduction/Printing	40,000	40,000	-
83807 - Insurance	11,000	22,513	11,513
84201 - Office Supplies	121,881	159,094	37,213
84321 - Equipment Maintenance	49,623	50,000	377
85100 - Educational Supplies	474,835	205,449	(269,386)
85102 - Testing Materials	7,525	10,750	3,225
85103 - Instructional Materials	276,237	345,990	69,753

D

Arlington Public Schools  
Budget Summary by Object  
Highlighting Comparisons of FY11 Budgets from March and October, 2010

Object Description	March Vote Budget	October Vote Budget	Budget Changes
85106 - Textbooks, Books & Periodicals	73,500	105,000	31,500
85110 - Instructional Equipment	15,050	21,500	6,450
85201 - Medical/Surgical Supplies/Services	10,973	15,675	4,703
85802 - Computer Supplies	30,769	30,769	-
85803 - Graduation Service/Ceremonies	10,500	15,000	4,500
85804 - Computer Software	48,077	48,077	-
87101 - Business Travel	2,000	2,000	-
87301 - Professional Affiliations Membership/Pubs	20,000	20,000	-
87601 - Court Judgments/Damage Settlements	200,000	200,000	-
Grand Total	44,222,832	45,000,421	777,589

E

**Overview: Where did the deficit come from?**

<b>Decreased Revenues:</b>	<b>Amount</b>
Grant Revenue losses	(\$220,000)
Circuit Breaker Funding Reduction (FY09@72%, est. 68%, actual 42%)	(\$415,000)
SpEd OOD Tuition Reimbursements (owed to Arlington by other towns)	(\$350,000)
LABBB Distribution cancelled	(\$200,000)
LABBB Credits unavailable	(\$250,000)
Other Fees, Offsets unrealized	(\$365,000)
<b>Increased Expenses:</b>	
Special Education Out-of-district Tuition Increases	(\$230,000)
Special Education Placement changes	(\$590,000)
<hr/>	
Overrun total:	(\$2,620,000)
<b>Mitigated by:</b>	
Extensive Cost Containment Efforts	\$1,100,000
<hr/>	
<b>Total Remaining Deficit:</b>	<b>(\$1,520,000)</b>

\*Numbers here are rounded. More detail can be found in spreadsheets.

F

Arlington Public Schools  
 FY10 Budget - Actual Summary  
 Based on Detail from Ruth Lewis, Comptroller

Comptroller's Report

This report summarizes the comparison of FY10 Town Appropriation Budget to the FY10 Town Appropriation Actual Expenses as reported by Ruth Lewis, Town Comptroller.

During FY10, as in other years, the whole scope of the School Department budget had been built on a variety of funding sources. The largest portion of the budget comes from the Town Appropriation. Many other vital activities are funded through grants, fee collections and other sources of revenue.

The FY10 Fiscal Year suffered from three major problems: reduced revenues, increased Special Education costs beyond budget, and reserve accounts that had been greatly depleted over the past several years.

During FY10, grants, fees and other sources of revenue declined well below budget expectations. While efforts were made to reduce expenditures, legally mandated Special Education costs, particularly in the area of out of district tuition, kept our expenditures at the levels anticipated by the FY10 Budget. Had all of our revenues materialized as budgeted, the Arlington Public Schools would have ended the year with a small positive balance.

The table below shows the areas in which the Town Appropriation absorbed expenses that had been planned to be covered by grants, fees or other sources of revenue that did not materialize.

	FY10 Budget	FY10 Actual Expenses	FY10 Budget Minus Actual	FY10 Areas Over Budget	FY10 Areas Under Budget
TOTAL CA - HS - SALARIES	6,708,820	6,706,652	2,168		2,168
TOTAL CA - HS - EXP	147,262	105,581	41,681		41,681
TOTAL HS SECONDARY EDUCATION	72,713	86,693	(13,980)	(13,980)	
TOTAL CA- OTTOSON - SAL	5,460,367	5,308,920	151,447		151,447
TOTAL CA - OTTO - EXP	29,157	25,368	3,789		3,789
TOTAL OTTO SECONDARY EDUCATION	44,298	44,654	(356)	(356)	
TOTAL CA - BISHOP - SAL	1,203,843	1,234,180	(30,337)	(30,337)	
TOTAL CA- BISHOP - EXP	9,036	7,159	1,877		1,877
TOTAL BISHOP ELEMENTARY EDUCATION	17,850	11,296	6,554		6,554
TOTAL CA - BRACKETT - SAL	1,277,163	1,247,524	29,639		29,639
TOTAL CA - BRACKETT - EXP	10,441	4,387	6,054		6,054
TOTAL BRACKETT ELEMENTARY EDUCATION	19,617	22,983	(3,366)	(3,366)	
TOTAL CA - DALLIN - SAL	1,126,440	1,174,354	(47,914)	(47,914)	
TOTAL CA-DALLIN-EXP	8,406	3,421	4,985		4,985
TOTAL DALLIN ELEMENTARY EDUCATION	16,769	18,505	(1,736)	(1,736)	
TOTAL CA - HARDY - SAL	1,042,201	1,016,905	25,296		25,296
TOTAL CA - HARDY - EXP	7,897	7,316	581		581
TOTAL ELEMENTARY EDUCATION	16,056	20,502	(4,446)	(4,446)	
TOTAL CA-PEIRCE-SAL	803,186	814,484	(11,298)	(11,298)	
TOTAL CA-PEIRCE- EXP	5,378	5,321	57		57
TOTAL PIERCE ELEMENTARY EDUCATION	12,429	13,835	(1,406)	(1,406)	
TOTAL CA - STRATTON - SAL	893,972	848,055	45,917		45,917
TOTAL CA STRATTON - EXP	7,001	4,326	2,675		2,675
TOTAL STRATTON ELEMENTARY EDUCATION	14,801	16,250	(1,449)	(1,449)	
TOTAL CA- THOMPSON - SAL	1,110,834	1,064,755	46,079		46,079
TOTAL CA THOMPSON- EXP	7,970	4,590	3,380		3,380
TOTAL THOMPSON ELEMENTARY EDUCATION	16,158	14,469	1,689		1,689
TOTAL CA - ESW - SAL	2,768,921	2,981,009	(212,088)	(212,088)	
ATHLETICS	160,800	194,552	(33,752)	(33,752)	
TOTAL PROFESSIONAL DEVELOPMENT	143,480	121,893	21,587	(6,127)	27,714

F

Arlington Public Schools  
 FY10 Budget - Actual Summary  
 Based on Detail from Ruth Lewis, Comptroller

	FY10 Budget	FY10 Actual Expenses	FY10 Budget Minus Actual	FY10 Areas Over Budget	FY10 Areas Under Budget
TOTAL SPED - SW - SALARIES	2,858,225	3,261,818	(403,593)	(403,593)	
TOTAL SPED - SW - EXP	3,810,963	4,866,499	(1,055,536)	(1,055,536)	
SW C&I ENGLIS	43,860	69,477	(25,617)	(25,617)	
SW READ/MATH	23,724	18,853	4,871		4,871
SW C&I ADMIN	86,166	87,421	(1,255)	(1,255)	
TOTAL HLTH RELATED - SW - SAL	482,953	531,313	(48,360)	(48,360)	
TOTAL AL - SW - STUDENT SERVICES	269,938	205,718	64,220		64,220
TOTAL AL - SW - SALARIES	466,152	501,862	(35,710)	(35,710)	
COUNSELING/PSYC	70,000	40,000	30,000		30,000
TOTAL SYSTEMWIDE EXPENSE	136,545	700	135,845		135,845
SW C&I SOCIAL	68,304	69,448	(1,144)	(1,144)	
TOTAL INSTRUCTIONAL EXP	15,000	62,863	(47,863)	(47,863)	
TOTAL C&I LEADERSHIP	88,609	21,312	67,297		67,297
TOTAL INSTRUCTIONAL EXP	10,000	16,726	(6,726)	(6,726)	
TOTAL FACILITIES MAINTENANCE	513,734	567,026	(53,292)	(53,292)	
TOTAL CUSTODIAL SERVICE	122,672	63,289	59,383		59,383
TOTAL SYSTEMWIDE EXPENSE	50,000	0	50,000		50,000
TOTAL OPERATIONS - ESW - EXP	5,000	569	4,431		4,431
TOTAL SYSTEMWIDE SALARY ALLOWANCE	715,284	803,491	(88,207)	(88,207)	
TOTAL OPERATIONS - SW - EXP	552,225	568,551	(16,326)	(16,326)	
TOTAL SCHOOL COMMITTEE	51,288	60,490	(9,202)	(9,202)	
TOTAL UTILITIES - SW - EXP	1,710,746	1,762,951	(52,205)	(52,205)	
SW TECHNOLOGY	244,255	257,826	(13,571)	(13,571)	
TOTAL TRANSPORTATION - SW - EXP	35,050	27,270	7,780		7,780
TOTAL CUSTODIAL/MAINTENANCE EXP	519,419	525,411	(5,992)	(5,992)	
TOTAL INFORMATION TECHNOLOGY	143,515	180,311	(36,796)	(36,796)	
TOTAL TRANSPORTATION REGULAR ED	510,328	591,108	(80,780)	(80,780)	
<b>GRAND TOTAL</b>	<b>36,767,221</b>	<b>38,292,242</b>	<b>(1,525,021)</b>	<b>(2,350,430)</b>	<b>825,409</b>

Summary of Expense Growth by Funding Source

Funding (see Note 1)	FY07 Actual Expense	Increase from Prior Year	FY08 Actual Expense	Increase from Prior Year	FY09 Actual Expense	Increase from Prior Year	FY10 Actual Expense	Increase from Prior Year	FY11 Budget	Increase from Prior Year	Five Year Increase
Grants/Fees	7,545,529	15%	7,093,603	-6%	8,434,702	19%	9,991,569	18%	9,786,439	-2%	30%
School Appropriation	34,932,530	1%	36,855,187	6%	36,602,427	-1%	38,292,240	5%	37,066,430	-3%	6%
School Not SPED	25,957,624	-2%	26,829,551	3%	26,809,675	0%	27,268,126	2%	26,108,213	-4%	1%
School SPED (see note 2)	8,974,906	11%	10,025,636	12%	9,792,752	-2%	10,724,114	10%	10,958,217	2%	22%
School Related Expenses in Town Budget	17,314,541	4%	18,986,193	10%	19,335,415	2%	21,216,951	10%	22,774,413	7%	32%
<b>Total School Related Expenses</b>	<b>59,792,600</b>	<b>4%</b>	<b>62,934,983</b>	<b>5%</b>	<b>64,372,544</b>	<b>2%</b>	<b>69,500,760</b>	<b>8%</b>	<b>69,627,282</b>	<b>0%</b>	<b>16%</b>

Student Enrollment	FY07	Increase from Prior Year	FY08	Increase from Prior Year	FY09	Increase from Prior Year	FY10	Increase from Prior Year	FY11 Estimates	Increase from Prior Year	Five Year Increase
Total Student Enrollment	4,716	0%	4,659	-1%	4,756	2%	4,848	2%	4,975	3%	5%

Total Special Education Students	FY07	Increase from Prior Year	FY08	Increase from Prior Year	FY09	Increase from Prior Year	FY10	Increase from Prior Year	FY11 Estimates	Increase from Prior Year	Five Year Increase
Total Special Education Students	854	6%	907	6%	804	-11%	896	11%	857	-4%	0%

Special Education Students Served in District	FY07	Increase from Prior Year	FY08	Increase from Prior Year	FY09	Increase from Prior Year	FY10	Increase from Prior Year	FY11 Estimates	Increase from Prior Year	Five Year Increase
Special Education Students Served in District	753	8%	800	6%	689	-14%	801	16%	770	-4%	2%

Special Education Students Placed Out of District	FY07	Increase from Prior Year	FY08	Increase from Prior Year	FY09	Increase from Prior Year	FY10	Increase from Prior Year	FY11 Estimates	Increase from Prior Year	Five Year Increase
Special Education Students Placed Out of District	101	-6%	107	6%	115	7%	95	-17%	87	-8%	-14%

Notes

- 1) This multi-year view of School Department expenditures is based on the Department of Elementary and Secondary Education's End of Year Report. All expenses related to the running of a school district are captured. DESE aggregates expenses into three broad categories: Grants - which includes grants from outside sources and all fee collections, School Committee - funds controlled by the School Department, and Town - those expenses carried by the Town which support the Schools. This includes health insurance, pensions, and various administrative activities.
- 2) These figures for Special Education do not include costs carried by Grants. The DESE does not separate Regular Education and Special Education costs within their Grants category.





## **Arlington Public Schools – Accomplishments, Strengths, and Recognitions Since Spring 2010 Town Meeting**

### **HIGH ACADEMIC & WELLNESS ACHIEVEMENT:**

- 1. Stratton Elementary School awarded Blue Ribbon designation by the US Department of Education**--The Blue Ribbons Schools Program, which began in 1982, “honors public and private elementary, middle and high schools whose students achieve at very high levels or have made significant progress and helped close gaps in achievement, especially among disadvantaged and minority students. The program is part of a larger Department of Education effort to identify and disseminate knowledge about best school leadership and teaching practices.” (U.S. Dept. of Education)

In Massachusetts, eight schools received the award. Among the eight schools, the four other public elementary schools were located in Andover, Winchester, Lexington, and Wellesley.

- 2. Arlington High School recognized as one of top 50 public high schools in Massachusetts**--In the September 2010 edition of Boston Magazine, Arlington High School was recognized as one of the top 50 public high schools in the state. It is noteworthy that 35 of the 50 high schools had a larger per pupil cost than Arlington. The average cost for the 34 schools that ranked ahead of Arlington High School was \$14,223. Weston, which was ranked number one on the list, has a per pupil cost of \$18,023. Arlington’s per pupil cost is \$11,813.
- 3. High Elementary MCAS Scores**--The Boston Globe (September 15, 2010) identified the schools that were the highest performers on MCAS in Reading, English, Mathematics, and Science for grades 3-8 and 10. In September 2010, because of these results, the Governor and the MA Department of Elementary and Secondary Education identified Arlington High School and three elementary schools, Brackett, Peirce and Stratton, as Commendation Schools for High Growth in Student Achievement.
- 4. Arlington #1 in MA for Lowest Obesity Rate Among Students** - In 2010, Arlington Public Schools had the lowest obesity rate among all of the districts in the state. Much of the credit for this designation goes to the extensive physical education and wellness programming available to students, which has been developed by the Director of Health, Wellness, and Guidance, the faculty in the Physical Education Department, and the Arlington Board of Health.
- 4. Commendable Advanced Placement Scores**
  - 25 students were AP scholars. This designation is granted to students who receive scores of 3 or higher (highest score is 5) on 3 or more AP exams.

- 18 students were AP Scholars with Honors. This designation is granted to students who received an average of score of at least 3.25 on all AP exams taken and scores of 3 or higher on 4 or more of these exams.
- 16 students were AP Scholars with Distinction. This designation is granted to students who received an average grade of at least 3.5 on all AP exams and grades of 3 or higher on 5 or more of these exams.

**5. College Acceptance Success-** According to The Senior Survey (a self report completed by all seniors), 90% of our students were accepted to their first or second choice college and 100% were accepted to their first, second, or third choice college.

### **COMMUNITY SUPPORT:**

1. In the face of the \$3.9 million FY11 budget reduction, the community raised nearly \$600,000 in private funds to offset the deficit (**Bridge The Gap Fund**) in just two months (May and June).
2. The **Arlington Education Foundation** raises money annually to support initiatives in the school district.

This year's AEF grant, which totaled \$52,200, includes funding for the third and final year of supporting *Enriching Elementary Education* as well as for the District to start planning for its key goal of improving math differentiation and support while integrating the sciences and technology into the elementary and middle school curriculum. Several teachers and administrators attended the Gateway Institute at the Museum of Science and met for several days afterwards to work on a plan to link the elementary, middle and high school technology and engineering efforts. AEF funds also allowed the purchase of key math curriculum materials for all the elementary schools.

In addition, in spring 2010, AEF approved an additional \$14,000 in smaller "Innovation Grants" to support teachers and schools in projects that ranged from supporting the introduction of online learning at the High School to mindfulness and yoga at an elementary school. The online learning grant at AHS has allowed students to enroll in online credit bearing enrichment courses and paid for wireless access to the internet in the Media Center and Cafeteria. Smaller grants such as these are approved in the spring and the fall each year.

3. An anonymous Arlington donor provided \$15,000 to start offering Mandarin Chinese in the high school in fall 2010.

### **GRANTS:**

1. Arlington was awarded the competitive **Teaching American History Grant**, nearly \$1 million, 3-year grant, that provides professional development for teachers K-12 and classroom materials for students in grades 3-12. Arlington is the leader of a

collaborative of seven districts sharing in the grant.

2. The \$99,000 **Readiness and Emergency Management Grant** to review, revise and standardize crisis planning policies and procedures is coming to a successful conclusion with training of administrators and school safety teams, as well as teachers, parents and students on school safety procedures and protocols.

#### **INFRASTRUCTURE & COMMUNICATION IMPROVEMENTS:**

1. Parents and students at Arlington High School received the ability to use the **Parent Portal** to view the on-line grading system. This access takes the place of warning notes and excess absence slips. Students and parents can use this internet tool to see how they or their students are doing in classes. Students can use this information in discussions with teachers before or after school in order to learn what they need to do to improve their grades. Parents can view the information to support their students in following-up with their teachers.

The Ottoson Middle School will join the high school in offering this capability later in November.

2. Alert Now is a new cost-effective way to inform parents about absences from high school with phone calls and e-mails sent automatically. This service ties into Powerschool to access current student contact information.
3. The District built a new **self-service list server** allowing parents to sign-up for e-mail lists at all schools through District's home page.
4. New budget tracking systems have been developed, including a position control database. A new well defined and easy to follow **Purchasing Procedures Manual** has been created and new guidelines have been instituted.
5. The Chief Financial Officer revised the **Chart of Accounts** to reflect the Department of Elementary and Secondary Education Chart of Accounts.
6. Arlington Public Schools upgraded its **web infrastructure** over the summer, moving to a Google environment for e-mail, and using cloud computing for Google Docs, Calendar, and Google Sites both for administrators and classroom teachers. Also, teachers now have remote access to their classroom desktops through the installation of a **Citrix remote desktop service**.
7. Arlington Public Schools re-built the **core network infrastructure** for the District, providing greater reliability and speed and positioning the District to access future technology upgrades. In addition, the District installed a 10-fold increase in **internet bandwidth capacity** to support the increased use of web-based teaching and learning. The District also built a virtual computing environment at the Ottoson Middle School to support the student computer lab. This virtual environment will also serve as a

**disaster recovery back-up** site. The technology efforts this summer also included standardizing across all town and school computers a **new virus protection** service to optimize computing security.

6. Arlington Public Schools **upgraded its copiers** to achieve several goals: a) decreased use of paper and supplies through scanning and electronic transfer of documents, b) more cost-efficient printing using copiers instead of printers, and c) consolidating all copier rentals to one vendor for town and school.



# Thompson School Building Committee Report

November 15, 2010

(Approved November 3, 2010)



## **Thompson School Building Committee (TSBC)**

- Kathleen Bodie, Ed.D., Superintendent of Schools (Chairperson)
- John Cole, Chairman, Permanent Town Building Committee
- Sheri Donovan, Principal, Thompson School
- Diane Fisk Johnson, Chief Financial Officer, Arlington Public Schools
- Tobey Jackson, Thompson Parent
- Robert Juusola, Permanent Town Building Committee
- Domenic Lanzillotti, Town Purchasing Manager
- Anthony Lionetta, Capital Planning Committee
- Mark Miano, Facilities Manager, Town of Arlington
- Suzanne Robinson, Permanent Town Building Committee
- Bill Shea, Permanent Town Building Committee
- Brian Sullivan, Town Manager
- Jeff Thielman, Arlington School Committee

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## TSBC Role & Responsibilities

- TSBC is established per 963 CMR 2.10 (3), which mandates a committee of local officials to advise the Superintendent and monitor the application process.
- Several TSBC members have substantial experience with capital projects in Arlington - three members are Town employees (Town Manager and two others), one is a long-time member of the Capital Planning Committee, and four are members of the Permanent Town Building Committee (three have served on the PTBC for many years, including the Chair).
- Superintendent is the "eligible applicant", with final authority over all submissions to MSBA.
- TSBC has three goals in its advisory capacity:
  - Ensure that the new or renovated school meets educational needs and is affordable to Arlington taxpayers, who must fund part of the school.
  - Adhere to the MSBA process in order to maximize state support.
  - Ensure that a new or renovated school meets the cost per square foot guidelines of the MSBA (currently \$275).

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## Profile of The Thompson School

- 336 students
- Most racially and economically diverse school in Arlington.
- Racial Make-up: 58 Asian, 21 African American, 230 White, 21 Hispanic, and 6 students who have not self-identified.
- 92 children (27%) on free and reduced lunch.
- 53 children (16%) receive English as a Second Language (ESL) services.
- 30 Special Education students (9%)
- 47 students (14%) receiving Title I services
- 88 children (26%) - English is not their first language.

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## Warrant Article 3

### CONTINGENT TRANSFER OF REAL ESTATE/THOMPSON SCHOOL AND NORTH UNION STREET PLAYGROUND

VOTED: That (1) the care, custody, management, and control of the Thompson School building and appurtenant land be and hereby is transferred from the School Committee to the Parks and Recreation Commission for the purpose of demolishing the school building and creating a new playground upon the site; and (2) the care, custody, management, and control of the North Union Street Playground and appurtenant land be and hereby is transferred from the Parks and Recreation Commission to the School Committee for the purpose of rebuilding the Thompson School upon the site, provided that this vote will be effective only upon both (a) the assent of the Parks and Recreation Commission and the School Committee to these transfers; and (b) appropriation by Town Meeting of funds to accomplish these purposes.

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## Why Article 3?

- The Thompson School rebuild process is in the Feasibility Study stage. As part of the Feasibility Study, the Massachusetts School Building Authority (MSBA), which is evaluating whether to fund a significant portion of the costs of the project, requires the Superintendent to present three viable rebuild options.
- One of the three options is to build a new Thompson school on the north lot and replace the existing school with a park. This option requires a lengthy process, which is detailed later in this presentation.
- The other two options entail rebuilding on the current site or a substantial renovation and addition to the existing building.
- A 2/3 vote of Town Meeting for the Warrant Article supports the presentation of three options to the MSBA by the December 1<sup>st</sup> deadline and avoids any delay in the rebuild process.
- Approval for the Warrant Article moves the process forward, shows a good faith effort on the part of the town to evaluate all alternatives, and demonstrates to the MSBA that there is community support for this project.

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## An affirmative vote on Article 3 is not . . .

- An indication that the land swap is the option that the TSBC will recommend, the Superintendent will choose, or the MSBA will approve.
- A final decision on the transfer, which requires a vote of town meeting in the spring to allocate funds to accomplish the transfer.
- An allocation of any town funds at this time – no money is involved in this warrant article.

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## Alternatives studied by TSBC

Alternative	Committee Decision
Renovate Only	Eliminated – not enough space to accommodate the enrollment approved by MSBA
Renovate and Add* (Alternative 1)	Accepted
Phased New Construction – 3-phase project in which part of old school would operate while construction occurred	Eliminated – not realistic
Demolish existing school and build new* (Alternative 2)	Accepted
Operate existing school and build on the north playground lot* (Alternative 3)	Accepted – does not require student relocation during construction
* Recommended by TSBC for presentation to MSBA on Dec. 1, 2010 as one of three options.	

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## Article 97 Requirements for Land Swap

- Town received federal funds to develop the North Union field in the 1970s & therefore Article 97 of the Amendments to the Massachusetts Constitution applies.
- Town must demonstrate that there is no feasible and substantially equivalent alternative to the disposition of the protected land & that the land to be disposed will be replaced with land of equal or greater value.
- Requires two 2/3 votes of Town Meeting (once to support the swap as an option and again to fund it), Unanimous Vote of the Conservation Commission and Parks & Recreation Commission, 2/3 vote of the State Legislature, and approval of the National Park Service.
- MSBA is aware of these challenges but wants to see a good faith effort to pursue all options.

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## Advantages to a land swap

- School continues on the current site
- Reduces transportation costs
- Science & Music rooms would not be occupied when students move to new school. Current plan is to move Thompson students to six elementary schools (each school gets one grade), but this would cause the elimination of music rooms in four schools and science rooms in two schools.
- Eliminates need for trailers or to house students in closed private schools outside of Arlington
- New park will be constructed

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## Disadvantages to a land swap

- Thompson community loses open space for two years.
- Current estimate to rebuild the park is approximately \$1,000,000; Capital Planning Committee members believe it could be as high as \$2,000,000.
- We do not know if there is hazardous contamination under the surface of the Thompson School or the park. If there is, the cost to build the park would be higher.
- Current school will operate adjacent to a construction site for 18 to 24 months
- Some towns that have done land swaps for schools have not followed through on the commitment to create a park.
- Transportation Advisory Committee (TAC) has concerns about traffic safety if the school is located on the north lot.
- Complicated land acquisition process (Article 97).
- Some abutters are opposed.

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## Necessary steps (locally) for the Land Swap

- October 26, 2010 – School Committee unanimously supports Warrant Article 3.
- Public Hearing with neighbors - November 3, 2010
- Town Meeting – November 15, 2010
- Conservation Commission Vote (must be unanimous)
- Park & Recreation Commission Vote (must be unanimous)
- Spring Town Meeting vote authorizing the funds to execute the land swap, if the north lot is the preferred option of both the Town and the MSBA

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## MSBA Timeline

- **November 1, 2010:** Preliminary Design Program submitted to MSBA
- **December 1, 2010:** Thompson School Building Committee must advise the Superintendent of its preferred alternative. Vote is submitted as part of completed feasibility study presented to MSBA. (Superintendent Bodie also wants the full School Committee to provide her with a "preferred alternative", though this is not a MSBA requirement).
- **December 15, 2010:** MSBA Subcommittee meeting to review the Thompson School Feasibility Study. Discussion of the three alternatives & preferred alternative.
- **January 26, 2011:** MSBA Board meets to review proposal and vote whether to move the Thompson project from feasibility study to schematic design phase.
- **January 26 – May 1, 2011 (If MSBA board approves Schematic Design Phase):** Schematic Design of preferred alternative takes place with substantial community input.
- **May 1, 2011 –** Schematic Design is submitted. By this date, there needs to be agreement between TSBC and town leaders on the scope, size and cost of the project.
- **June 1, 2011 –** MSBA Subcommittee meets to review schematic design
- **July 25, 2011 –** MSBA Board meets to review schematic design of the Thompson School and to award MSBA funding for the project. **If approved**, the town of Arlington has 120 days to obtain funding from Town Meeting and/or by a referendum to finance the project.
- **November 24, 2011 –** deadline for securing town funds for the project.
- Failure to secure funding means the project has to start over.

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## Public Input during Schematic Design Phase

- During the schematic design phase, TSBC will seek input from the Capital Planning Committee, Permanent Town Building Committee, Board of Selectmen, School Committee and Finance Committee to come to agreement discuss the scope, size and cost of the project.
- By May 1<sup>st</sup>, the schematic design submitted must have evidence of community agreement for the scope and cost of the project. After May 1<sup>st</sup>, the project can get smaller (to reduce costs), but not larger.
- Key questions are whether (or to what degree) MSBA will reimburse Arlington for the proposed central kitchen, daycare facility, early childhood center, and special education support space within the early childhood area. Dates when TSBC will be required to come to the community and the committees mentioned above for input:
  - After December 15, 2010, date of MSBA Subcommittee meeting
  - After January 26, 2011, date of MSBA Board meeting
  - Prior to May 1, 2011, date of submission of schematic design.

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## School Rebuild History

- In 1993, a Schools Facilities Master Plan concluded that the seven elementary schools were antiquated and could not meet modern educational programming needs.
- In town-wide referenda in 1998 and 2000, Arlington's voters approved the rebuilding and/or renovation of the seven elementary schools.
- Between 2000 and 2005, five elementary schools were rebuilt with the majority of costs being paid with funds from the School Building Assistance Bureau (SBAB).
- The last two schools on the list to be repaired were the Thompson (built in 1956) and the Stratton (built in 1962 and added to in 1968). The two final schools were newer and in better condition than the Brackett, Bishop, Hardy, Peirce, and Dallin.
- The SBAB was replaced in 2004 by the **Massachusetts School Building Authority (MSBA)**, which operates under different regulations.

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## New MSBA Process

- MSBA process begins with local determination of a *problem* through a Statement of Interest (SOI). This differs from the SBAB program, under which the first five elementary schools were rebuilt, which began with local definition of the *solution*.
- MSBA oversees the space study, enrollment projections, and decides if districts have a need. The MSBA wants central decision-making by an authorized person at the municipal level and generally works with the school superintendent.
- Pursuant to the new rules, in 2007 the School Committee submitted Statements of Interest to MSBA for Thompson, Stratton, and the High School.
- The High School and Stratton were rated in categories 1 or 2 in the MSBA survey and were determined not to need substantial assistance.
- The Thompson was placed in the "Planning Category," meaning that additional MSBA investigations were required to establish whether work was needed.

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## MSBA Criteria for Capital Investment

- **Building Condition** – whether the building exhibits signs of moderate to severe deficiencies in multiple building systems, such as roofing system, windows and doors, heating and ventilation systems
- **Building Capacity** – whether the building exhibits signs of moderate to severe overcrowding including excessive class sizes, inadequate number of classrooms, conversion of non-educational space to educational uses
- **Educational Program** – whether the ability to support the required educational program is adversely affected by the building's condition and/or capacity
- **Structural Deficiency** – whether the building has clearly documented structural deficiencies that pose an immediate risk to the health and safety of building occupants

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## MSBA Senior Study at Thompson

- In Sept. 2007, the MSBA visited the Thompson Elementary School to conduct a Senior Study.
- MSBA concluded that Thompson was "tired" but not overcrowded or in egregious physical condition.
- On February 21, 2008, Arlington officials met with Sarah Young, MSBA Director of Facilities Programming and Planning, and other MSBA officials and stated that:
  - **Arlington voted two debt exclusions to support the rebuilding or renovation of all seven elementary schools.**
  - **The five rebuilt schools were designed under the assumption that there would be seven. There is not sufficient room system-wide to consolidate. There are only two unused K-5 classrooms system-wide.**
  - **Most students can walk to school, so the District does not have to provide transportation within its tight budget.**
  - **Arlington is creating new in-district Special Education programs to reduce the number of students who have to leave the district to receive the services they need. This will reduce out-of-pocket operational costs but require capital costs for new facilities.**
  - **The district projected 1%–2% elementary enrollment growth for the foreseeable future, driven in part by a generational changeover in homeownership. New families are drawn to Arlington by its relative affordability and good schools.**
  - **There was a discussion about the condition of the Thompson building, including leaky windows, a very old boiler, a leaky roof, a tiny library and a kindergarten wing that is not well configured for its educational mission.**

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## **MSBA Approval of Thompson Feasibility Study**

- On November 11, 2008, a Statement of Interest for the Thompson School was submitted to the MSBA.
- Katherine Craven, Executive Director of the MSBA, visited and toured the building in February of 2009
- On March 25, 2009 the MSBA Board invited the Town of Arlington to collaborate on a Feasibility Study of Thompson
- Thompson School Building Committee formed in spring of 2009
- Kevin Nigro from PMA Consultants selected as the Project Manager through the MSBA process.
- In December 2009 the MSBA, with input from Arlington officials, selected the Architectural Firm HMFH to conduct the feasibility study.
- Feasibility Study must include three alternatives, and the MSBA requires the town to look at locating the school on open space because it minimizes interruption of educational services.

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## **Concepts presented by Thompson Building Committee for MSBA consideration**

- Arlington's increasing enrollment must be considered when planning the rebuild or renovation of Thompson.
- The school district's central kitchen is located at the Thompson. It provides and stores food for the district.
- The Thompson is a logical place for Early Childhood Special Education Programs & Daycare for children of faculty members.

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## Rising Enrollment (Accepted by MSBA)

- District has increased enrollment from 4,165 in 1999-2000 school year when the rebuilding effort began to 4,784 during the 2009-10 school year.
- This is an increase of 619 or 15% over ten years.
- Elementary Enrollment:
  - 2005-06 (year the new Dallin opened) Elementary Enrollment = 2,369
  - 2009-10 Elementary Enrollment = 2,493
  - 2010-11 Projected Elementary Enrollment = 2,570
- Projected K-12 enrollment for 2010-11: 4,912 (18% higher than 1999-2000)
- School Committee voted to redistrict by the time the new Thompson School opens
- Current enrollment of Thompson is 335. Because of rising enrollment, MSBA approved a capacity at Thompson of 380 students. This does not include the 60 or so students that would be housed in the Early Childhood Center.
- **MSBA approved revised enrollment capacity for Thompson on May 28, 2010, meaning that the choice is now between a rebuilt school or a renovated school with an addition.**

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## Special Education – Housing Pre-K at Thompson (MSBA will consider this concept as part of its review of the feasibility study)

- School Districts are mandated to provide Special Education services for children ages 3-5. We currently educate 56 Pre-Kindergarten students in-district at an annual cost of \$922,849.
- The district is educating three out-of-district Pre-K students at a total annual cost of \$272,000. The three out-of-district children could be educated in-district if we had more space.
- The number of Pre-K children evaluated and found eligible for Special Education services is increasing.
- Currently our Pre-K programs are housed at Arlington High School in less than optimal space.
- No windows in one classroom and therapy rooms
- No running water in most classrooms
- Only one bathroom for boys and girls
- One classroom opens directly onto interior driveway to a loading dock
- Therapy rooms & offices are created through “temporary” partitions in corridors
- Drop-off & pick-up traffic patterns create safety issues

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## Reducing out-of-district placements

- The district is projected to spend \$1.2 million less this year than in FY '09 on out-of-district tuition and transportation costs. To continue to meet operating budget constraints, it is critical that more students are educated in-district.
- Out-of-district special education placements were reduced from 106 in FY '10 to 86 in FY '11.
- Generally, it costs the town half as much to educate a child in-district as opposed to out-of-district.
- Providing Pre-K special education students in-district programming makes it less likely they will require services outside of the system.

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## Long Term Savings due to placing additional Special Education Space at Thompson

APS Pre-K	Cost	Enrollment	Out-of-district cost	One-year savings	# of Pre-K students who will remain out-of-district w.o. in-district offering	Lifetime cost of 6 Pre-K students not returning (assuming # of Pre-K students who remain out of district)	Lifetime Cost of educating 6 Pre-K students in district
Pre-K/Pre-School I	\$524,477	16	\$542,144	\$130,667	4	\$3,855,868	
Pre-School II	\$168,815	6	\$332,766	\$163,951	2	\$2,476,244	
Services Only	\$229,557	37	\$223,148	\$(6,410)			
<b>Total Pre-K</b>	<b>\$922,849</b>	<b>59</b>	<b>\$1,098,058</b>	<b>\$288,206</b>	<b>6</b>	<b>\$6,332,112</b>	<b>\$1,871,493</b>
<p>\$4,460,619 = Difference between the cost of educating 6 "typical" in-district Pre-K students out-of-district and the lifetime cost of educating 6 Pre-K students in-district</p> <p>\$297,375 = Annual savings for 6 Pre-K students educated in district</p>							

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## Central Kitchen

(MSBA will support a normal sized kitchen for an elementary school but has not reacted to funding a large kitchen responsible for preparing & storing food for multiple schools)

- Central kitchen for all seven elementary schools is at Thompson.
- Kitchen is where items are prepared from scratch, chilled in a cooler or freezer and shipped cold to other elementary schools.
- Equipment includes double skillet convection oven, tilt skillet, tilt kettle, 2-burner range, sonic steamer.
- The kitchen has cold and dry storage areas because Thompson receives government commodities deliveries of milk, eggs, cheese, etc. for all schools, including middle and high schools.
- The deliveries arrive every 1-2 weeks, are held at Thompson, and delivered to the elementary schools daily and the middle/high schools every other week.
- Central kitchen saves money because it prevents over-buying food for 9 buildings
- Minimizes the cost of food delivery

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## Sizes & Enrollment of Arlington Elementary schools

Elementary School	Square Footage (per 2010 Capital Planning Committee Report)	Year Built (Rebuilt)	October 1, 2010 Enrollment (APS Data)
Bishop	51,367	2002	371
Bracket	57,670	2000	446
Dallin	68,578	2005	425
Hardy	55,107	2001	329
Peirce	48,500	2003	268
Stratton	63,300	1962 & 1968	346
Thompson	59,000	1956	335
Total			2,520

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## DALLIN PROJECT

- Begun in 2004. New school opened January 2006.
- Total Cost = \$11,785,302 (68,578 square feet x \$172 per square foot)
- Hard Costs = \$10,463,466 (general contract, equipment, technology, site development)
- Soft Costs = \$ 1,321,836 (architect, legal, & construction management fees and "other")
- Total = \$11,785,302
- Soft costs represent about 11% of the total budget.
- State reimbursement rate was 63%.

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## Proposed Thompson v. Dallin (rebuilt – 2005)

Proposed Thompson	Comparative Criteria	Dallin
2012-13 (pending approval)	Construction Period	2004-05
83,495 (with Special Education - Early Childhood = @ 13,770 sf; Central Kitchen @ 3,060 sf & Day Care @ 1,836 sf)	Square Footage	68,578
64,829	Square Footage <i>without</i> kitchen, daycare, & early childhood	68,578
\$275 (current MSBA cap)	Cost per square foot	\$172
\$17,827,975	Cost of building each school today <i>without</i> kitchen, daycare & early childhood @ \$275 per square foot (MSBA cap)	\$18,858,950

\*Central kitchen and daycare center may not be reimbursable by MSBA. The costs of a normal kitchen for an elementary school is reimbursable by MSBA, but it is unclear if MSBA will fund a large central kitchen that serves multiple schools. Day care program for faculty and staff is not a mandated program and may not be funded by MSBA.

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### Cost Estimates of three options (as of October 5, 2010)

Work to be done	Square Footage & Cost Percentages	ALTERNATIVE ONE (Renovation & Addition)	ALTERNATIVE TWO (New School on Existing Site)	ALTERNATIVE THREE (New School on North Field)
Additions & Renovations to Existing School	83,495	\$16,709,334		
New School Building	83,495		\$17,121,562	\$17,121,562
Sitework		\$2,079,302	\$1,988,539	\$2,018,885
Demolition		\$155,100	\$287,400	\$287,400
Hazmat Removals		\$350,000	\$350,000	\$350,000
Sub Total		\$19,293,736	\$19,747,501	\$19,777,847
General Conditions	6%	\$1,157,624	\$1,184,850	\$1,186,671
Bonds	.65%	\$125,409	\$128,359	\$128,556
Insurance	1.25%	\$241,172	\$246,844	\$247,223
Permit		NIC	NIC	NIC
Overhead & Fee	4%	\$771,749	\$789,900	\$791,114
Escalation & Mid-Point (3 <sup>rd</sup> Quarter 2012)	8%	\$1,543,499	\$1,579,800	\$1,582,228
Design & Pricing Contingency	10%	\$2,313,319	\$2,367,725	\$2,371,364
Portable Classrooms		NIC	NIC	Not Required
<b>Total of All Construction</b>		<b>\$25,446,508</b>	<b>\$26,044,979</b>	<b>\$26,085,003</b>

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### Breakout & Additional Costs

Item	ALTERNATIVE ONE (Renovation & Addition)	ALTERNATIVE TWO (New School on Existing Site)	ALTERNATIVE THREE (New School on North Field)
Breakout Costs for Central Kitchen (included in pricing in previous slide)	\$787,644	\$787,644	\$787,644
Breakout Costs for Early Childhood Center (included in pricing in previous slide)	\$3,544,398	\$3,544,398	\$3,544,398
Breakout Costs for Daycare (included in pricing in previous slide)	\$472,586	\$472,586	\$472,586
REPLACE EXISTING BALDFIELDS			\$953,495

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## Total Project Cost Budget Estimates\*

	ALTERNATIVE ONE (Renovation & Addition)	ALTERNATIVE TWO (New School on Existing Site)	ALTERNATIVE THREE (New School on North Field)**
3 <sup>rd</sup> PARTY ESTIMATE	\$32,279,664	\$32,948,604	\$33,944,307
LESS ESTIMATED MSBA REIMBURSEMENT AT 47.21%	\$14,910,621	\$15,319,461	\$15,320,749
ESTIMATED FUNDS AVAILABLE FROM PREVIOUS DEBT EXCLUSION VOTE (SEE NEXT SLIDE FOR MORE INFORMATION)	\$4,000,000	\$4,000,000	\$4,000,000
AMOUNT ARLINGTON WOULD HAVE TO RAISE FROM TAXPAYERS IN A DEBT EXCLUSION VOTE	\$13,369,043	\$13,629,143	\$14,623,558
*Includes architectural fees, bond costs, legal costs, consulting fees, etc.			**Includes cost of replacing the field

It is unlikely that MSBA will approve a project at this price. Maximum MSBA price per square foot is \$275, not \$350, the current rate in the feasibility study. The project scope and price will be reduced during the schematic design phase.

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## Previous Debt Exclusion Funds

- According to the Chairman of the Capital Planning Committee, there is approximately \$11,000,000 in unused debt exclusion borrowing capacity.
- The Massachusetts Department of Revenue has ruled that the Town can legally utilize the full debt exclusion capacity to raise funds through borrowing for one or more of the seven schools.
- Several organizers of the 1998 and 2000 Debt Exclusion votes believe, however, that only 37% or approximately \$4,000,000 of this money is ethically or politically available because taxpayers were told that 63% of the costs of each project would be covered by the School Building Assistance Bureau (SBAB).

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Approved by the Arlington School Committee October 26, 2010

## Arlington Public Schools District Goals 2010-2011

**APS Mission: All students will achieve at their full social, emotional, creative and academic potential, and will be prepared for higher level academics, workforce success, active citizenship, and life-long learning.**

### Themes for 2010-2011 District Goals:

- **Increasing academic achievement in reading, writing, science, and math for all learners with attention to subgroup populations: Low Income, Special Education and Limited English Proficiency**
- **Responding to new anti-bullying law**
- **Building a collaborative and inclusive culture for regular and special education teachers and parents**
- **Expanding technology tools to support the implementation of the district goals**
- **Increasing communication and collaboration toward district goals with all stakeholders**

**Goal 1: Ensure all Arlington students are well-prepared for academics, social, emotional, and vocational success in the 21<sup>st</sup> century.**

#### **a. Increase achievement in reading K-8**

1. Augment Response To Intervention (RTI) tiered reading support K-6.
  - K-2: More time on reading for identified students
  - Gr. 3-5: Monitor independent reading
  - Gr. 6: Extend RTI reading program and progress monitoring.
2. Increase progress monitoring for Tier3 students.
3. Expand reading service to all Supported Learning Center & Language-Based special education students.
4. Provide training in curriculum content and standards, i.e *Foundations*, reading comprehension, etc., for all special education and ELL teachers.

5. Hold individual Data Review & Service meetings for special education students who are in Warning/Needs Improvement (W/NI).
6. Analyze district special education 2010 subgroup data for MCAS and Growth results. Develop intervention plans based on data.
7. Share and monitor Individual Student Success Plans (ISSP) with teachers, reading specialists, counselors, special education liaisons, and administrators.
8. Implement co-taught inclusion model at the Peirce School Gr. 1-5.
9. Build teacher capacity (PD):
  - Expand differentiated instruction (DI) tools for classroom teachers
  - Expand repertoire of vocabulary instructional techniques.
10. Expand non-fiction reading across the curriculum, using *Teaching American History* (TAH) resources in Gr. 3-5.

#### **b. Increase student achievement in math K-8**

1. Complete *Assessing Math Concepts* (AMC) training for Gr. 2 teachers, including ELL and SpEd teachers.
2. Integrate AMC into the classroom curriculum and common assessment schedule in Gr. K-2.
3. K-2 Math RTI Initiative: Begin Math Response To Intervention (RTI ) planning for structure and best practices. Pilot math RTI at Hardy School.
4. Gr. 6-8:
  - Teachers administer common assessments to all students to improve teaching and learning.
  - Offer math support to students with Needs Improvement (NI) and Warning (W) on MCAS.
  - Share and monitor ISSP plans by teachers, reading specialists, counselors, special education liaisons, and administrators.

#### **c. Increase student achievement in writing K-12**

1. Gr. 3-5: Analyze student strengths and weaknesses on topic development. Revisit Looking at Student Work (LASW) using writing rubrics; set benchmarks for assessments.
2. K-5: Revise writing common assessments.

3. Gr.3 Initiative: Introduce Lucy Calkins Writing Program to support integration of genre writing into current elementary writing program.
4. Gr.5: Adopt Gr 6-12 MLA based research and writing skills.
5. Gr.6-12: Develop common writing assessments.

**d. Improve student achievement in science content and process skills and increase student awareness of opportunities in STEM fields K-12**

1. Gr. 9-12: Explore and implement instructional strategies for delivering science content and process skills in light of reduced student contact time.
2. Utilize Verizon and Gateway Institute (Museum of Science) resources to increase student awareness and opportunities in STEM fields.

**e. Improve the social/emotional climate in all schools**

1. Develop and begin to implement APS Bullying Prevention and Intervention Plan by Dec. 31, 2010.
2. Develop School Committee policy consistent with anti-bullying law by June 2011.
3. Provide administrators with professional development on investigation of bullying complaints.
4. Develop standard protocols, corrective actions, and codes of conduct/discipline for bullying for all schools.
5. Provide professional development during the fall to explain school safety and reporting protocols to teachers and staff.
6. Research and begin to implement programs to enhance school climate.
  - Gr. 3-5 - Implement anti-bullying curriculum, *Open Circle*, in all elementary schools.
  - Gr. 6-8 – Implement *World of Difference* Program (peer leaders) to increase student and adult respect for differences.
  - Gr. 9-12 – Research and develop programs to reduce student stress.

**f. Improve transitions to higher education and the world of work.**

1. Gr. 9 students will take Naviance “Learning Styles” inventory.
2. Gr. 10 students will take Naviance “Career Interest” inventory.
3. Gr.11-12 students will utilize expanded Naviance program in college process and post-secondary planning

**g. Expand common assessments in all subjects Gr. 6-12 to provide consistency of instruction and student outcomes.**

1. Gr. 6-8: Develop and administer common open response reading comprehension assessments and writing assessments twice a year to all students to monitor and improve classroom teaching and learning.
2. Provide time for teachers to develop common assessments and grading rubrics and to evaluate student performance on common assessments.

**h. Implementation of the Teaching American History Grant (TAH).**

**GOAL 2: Create systems for increased communication and collaboration across the district.**

**a. Improve communication between the schools and parents**

1. The focus this year is on bullying prevention in response to legislation.
  - Form Bullying Task Force
  - Explain bullying policies through on-line written communication and school handbooks.
  - Use parent meetings and parent forums to explain the scope and intent of the bullying law and the district’s response.
2. Explain safety protocols developed through REMS grant to parents via APS website.
3. Pilot Safety Net ( formerly Connect-Ed) for parent communication at AHS, OMS, Peirce, Hardy, and Stratton.
4. Gr. 9-12: Implement PowerSchool portal for parents to access grades, attendance and update demographic information.
5. Consistently provide hard-copy of parent communications to families without home computer access.



**b. Improve communication between the district and the community.**

1. Collaborate with ACMI to extend and enhance programming efforts to show various elements of the Arlington Public Schools.
2. Provide Superintendent's monthly newsletter highlighting activities, progress, and events within the APS to all residents. Subscription option to newsletter available on the website.
3. Post budget documents and power point presentations on district website.

**c. Improve internal professional communication among schools, departments, and other groups**

1. Develop common Collaborative Learning Teams (CLT) format, and schedule meetings to share results of CLT work.
2. Use Google Docs to share work within departments.
3. Develop common procedures and formats for reporting incidents of bullying
4. Share monthly budget report within district.
5. Increase collaboration among guidance/teachers/special education liaisons for improved monitoring and oversight of at-risk students.

**d. Improve Special Education collaboration**

1. Establish monthly meetings with Principals, Director of Special Education, and Assistant Directors.
2. Clarify list of common student accommodations for all staff as part of professional development in the fall.
3. Use PowerSchool to list accommodations (SpEd and 504).
4. Use district administrative meetings to improve communication among Special Education Administrators, Principals, and Department Leaders.
5. Create an Inclusion Design Team with all stakeholders to develop common vision, evaluate current status, examine best practices, and establish time table for resulting change actions.

**Goal 3: Provide the tools, infrastructure and systems to support district initiatives and learning environments**

**a. Expand and implement technology tools to improve communication**

1. Implement new district google-based, secure email system.
2. Develop K-12 calendar.
3. Update Acceptable Use Agreement (AUP) for staff and students. Have all staff sign updated AUP.
4. Train all staff on new Google applications.
5. Implement google docs for in-district professional collaboration.
6. Use google docs as tool for self- study at AHS in preparation for NEASC accreditation visit in 2012.
7. Make available all 504 plans in PowerSchool.
8. Review technology program and develop district technology plan for the state.

**b. Develop and implement budget tracking system.**

1. Develop position control system.
2. Review and update purchasing procedures. Disseminate and implement new guidelines.
3. Develop singular budget format for all stakeholders.
4. Develop updated and expanded chart of accounts.

**c. Complete feasibility study and develop schematics for new or renovated Thompson Elementary School**

1. Complete feasibility study
2. Prepare documents for January Massachusetts School Building Authority (MSBA) board meeting.

**d. Develop redistricting plan**

Provide School Committee with interim redistricting report by December, 2010 (implementation upon completion Thompson school project).

**Summary of Recommendations**  
**Financial Processes, Reporting and Management in the Arlington Public Schools**  
**Massachusetts Association of School Business Officials – October 2010 Report**

#	Category	Sub Categories	Recommendation	School Department Response	Responsibility of...	Deadline for Completion
1	Budget Management	More Internal Oversight	Adopt a site-based budget in order to ensure accountability at the "cost center" level.	Further Study		
2	Budget Management	More Internal Oversight	Revise the purchasing process so that a) each school has a terminal that connects to the central office, b) a school's budget is automatically adjusted when a purchase is approved, and c) the district contact MUNIS to inquire about necessary implementation and training.	Further Study		
3	Budget Management	More Internal Oversight	Implement a decentralized budget process in which principals develop budgets consistent with their School Improvement Plans	Agree		
4	Budget Management	More External Oversight	Include all district fund sources per Policy DI in monthly reports on income and expenditures from the CFO	Implemented		
5	Budget Management	More External Oversight	Monthly reconciliation by town and school officials of school department spending	Agree		
6	Budget Management	Internal Systems	Implement a written inventory control procedure; note that Munis has this capability	Agree		
7	Budget Management	Revenue Sources	Review opportunities for reducing electrical procurement costs through competitive procurement options.	Implemented		
8	Budget Management	Revenue Sources	Maximize revenue derivatives from school facility rentals.	Agree		

**Summary of Recommendations**  
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#	Category	Sub Categories	Recommendation	School Department Response	Responsibility of ...	Deadline for Completion
9	Budget Management	Forecasting	Implement budget forecasting when 3 or 4 actual salary payrolls have been experienced and develop forecasting for three other categories that can experience budget variances – special education, retirement program obligations, and energy.	Further Study		
10	Cash Management	More Internal Oversight	Formally adopt guidelines for the operation and oversight of Student Activity Funds	Agree		
11	Cash Management	Procedures	Adopt written cash collection policies and procedures for all revolving accounts including Athletics (gate receipts), Food Service, Student Activity Accounts, and User Fee Accounts	Agree		
12	Cash Management	Handling	Implement a written cash management procedure for the Food Services Program that includes a “chain of custody” process for cash handling	Agree		
13	Organizational	Personnel	Update Job Descriptions of all Business Office Personnel	Agree		
14	Organizational	Personnel	Update District Organizational Chart to delineate clearly staff relationships	Agree		
15	Organizational	Personnel	Establish a Human Resources Position	Agree		
16	Organizational	Procedures	Develop Business Office Procedures Manual	Agree/ Implementation Underway		
17	Organizational	Procedures	Ensure that all staff in the Business Office are trained in Munis.	Agree		

**Summary of Recommendations**  
**Financial Processes, Reporting and Management in the Arlington Public Schools**  
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#	Category	Sub Categories	Recommendation	School Department Response	Responsibility of ...	Deadline for Completion
18	Organizational	Procedures	Implement cross training to cover illness and vacations	Agree		
19	Organizational	Efficiency	School District Automation of Financial, Purchasing, Payroll, Personnel, Maintenance and Building Software	Further Study		
20	Organizational	Efficiency	Network school and other cost center computers to the Munis Financial system	Further Study		
21	Organizational	Efficiency	Decrease interruptions to the Payroll Bookkeeper and Budget Analyst	Agree		
22	Policy	Clarity	Redraft School District's Budget Transfer Policy	Agree		
23	Policy	Clarity	Written Agreement with Town of Arlington to calculate indirect charges levied by the Town to the school department per state regulation 603 CMR 10.04.	Agree		
24	Policy	Clarity	Formalize an agreement with the Town relative to refunds of Medicaid Revenues generated by the School system	Further Study		

**Summary of Recommendations**  
**Financial Processes, Reporting and Management in the Arlington Public Schools**  
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#	Category	Sub Categories	Recommendation	School Department Response	Responsibility of ...	Deadline for Completion
25	Policy	Alignment with Ed Reform	Budget Process should be clearly defined and must use student achievement data as a primary factor in making budget decisions. School Committee should vote Goals and Objectives at the start of the Budget cycle, and the completed document should include three-year history of actual expenditures and current information on all fund sources.	Further Study		
26	Policy	Alignment with Ed Reform	Use student assessment data to develop the budget	Agree		
27	Policy	Internal Audits	Review all Massachusetts General Laws relative to the implementation of financial operations in the district	Agree		
28	Policy	Internal Audits	Implement an evaluation-based review process to determine the effectiveness of the budget	Further Study		

**Total School Spending Over Time**

This multi-year view of School expenditures is based on the Department of Elementary and Secondary Education's End of Year Report. All expenses related to the running of a school district are captured.

The DESE aggregates expenses into three broad categories

Grants - which include grants from outside sources and all fee collections

School Committee - funds controlled by the School Department

Town - those expenses carried by the Town which support the Schools.

This includes health insurance, pensions, and various administrative activities.

This view includes all expenses, from grant, school and town, together.

This table shows changes in actual expenditures over multiple years, and compares it to the FY11 Budget by some important categories of expense

Types of Educational Expense	FY07 Actual Expense	FY08 Actual Expense	FY09 Actual Expense	FY10 Actual Expense	FY11 Budget
Admin & Educational Leadership	4,308,445	4,253,363	4,486,707	5,125,984	5,013,506
1 Teaching & Educational Support	25,249,144	26,037,853	26,898,522	28,085,569	25,885,176
Educational Supplies	519,757	562,867	522,311	393,832	602,690
2 Legal Services	64,581	256,850	281,147	478,250	800,000
Information Technology	691,718	766,093	762,022	892,707	749,194
Transportation	1,049,838	1,114,203	1,328,820	1,112,717	1,242,732
Food Services	1,208,769	1,198,067	1,321,146	1,246,802	1,384,327
Athletics/Student Activities	573,947	514,076	560,094	756,170	663,812
Facilities	8,779,650	9,292,227	8,744,212	9,398,262	10,376,564
Tuition to Other Schools	4,760,042	5,172,903	5,198,568	6,125,253	6,069,198
Emp. Benefits & Minuteman	12,586,709	13,766,481	14,268,995	15,885,214	16,840,083
Total Expense/Budget	59,792,600	62,934,983	64,372,544	69,500,760	69,627,282

1 Teaching and Education Support, which includes Guidance and other direct services to children, has been reduced from FY10 to FY11 by \$2.2 million dollars.

2 Legal expenses for FY11 break out as follows:

\$300,000 School Based Legal (labor and other)

\$200,000 Reserve for Legal Settlements

\$200,000 Reserve for SpEd settlements

\$100,000 Town Legal Expenses on behalf of School

## COLLEGE ACCEPTANCE AND MATRICULATION REPORT CLASS OF 2010



The Arlington High School Guidance Department is pleased to announce the postgraduate statistics for the Class of 2010.

Members of the Class of 2010 received an admirable number of acceptances to college, in the light of a declining economy, loss of family income/residence, and increased competition for college admission slots due to a large demographic population of grade 12 students across the nation. It must be said that we are proud of each and every graduating senior including the special needs students who were accepted to supportive programs in various college settings, the students who found their niche in 'hands-on' postgraduate programs, the students who had the courage to explore schools outside of the USA, the students who found their 'perfect fit' colleges, as well as those who achieved at the highest level resulting in acceptances to upper tier and Ivy League schools!

Here are some impressive facts:

- AHS guidance counselors processed 1,595 transcripts (1,261 in 2009) for the Class of 2010.
- Students in the Class of 2010 applied to 284 colleges in 37 states, as well as England, Scotland and Canada. (Statistics from Naviance)
- Students in the Class of 2010 received acceptances to 232 colleges in 36 states as well as England, Scotland and Canada. (Statistics from Naviance)
- Students in the Class of 2010 elected to matriculate at 105 colleges in 26 states and England. (Statistics from Naviance)
- While AHS students clearly prefer to attend New England Colleges, Naviance statistics show that there is an increase of matriculation to other geographic areas over the past four years. (2010: 15%; 2009: 14%; 2008: 13%; 2007: 12%). Over the past four years, students have also applied to and/or matriculated to colleges in a variety of countries including France, England, Ireland, Scotland, Greece, Canada, Puerto Rico, and Slovakia.
- According to The Senior Survey (a self report completed by all seniors), 90% of our students were accepted to their first or second choice college and 100% were accepted to their first, second, or third choice college.
- Naviance Statistics for the Class of 2010 show that just over half of the four-year college applicants from AHS are electing to enroll in private colleges (58%), while 42% are electing to enroll in public colleges. Our two-year college applicants are electing to remain in state (97%). The four year private college trend may be a reflection of greater access to financial support made available through private college endowments and federal aid, as compared to the federal aid available at public colleges. This trend might also be a reflection of limited admissions slots in public colleges due to increased demographics.
- Students in the class of 2010 received overwhelming financial support from the Arlington Community in the form of Scholarships with awards totaling over \$361,450 (AHS Community)(435,500 with Dollars for Scholars and several other reported scholarships) in 2010 and \$308,000 in 2009, marking a notable increase



from \$180,000 received in 2008. Many thanks to the Arlington community for its continued support of the Arlington High School Students!

- It is clear that colleges have a high interest in Arlington High School students, with 69 college representatives scheduling visits to recruit AHS students on our campus, and with 130 college representatives signing on to recruit AHS students at our annual College Fair.

According to the Arlington High School SIMS data, college acceptance and attendance has remained stable. This is a noteworthy feat in tough economic times with high demographics producing record breaking competition for limited admission slots, and with waning means to fund the cost of a college education.

The SIMS data is as follows:

### AHS HIGH SCHOOL PROFILE DATA TABLE

	2006-2007	2007-2008	2008-2009	2009-2010
Percent to 4-Yr. College	75%	76%	79%	77.3%
Percent to 2-Yr. Coll & Technical Schools	16.6%	11.8%	13%	13.4%
Percent Continuing Ed.	91.6%	87.8%	92%	90.7%
Percent to Military	.3%	1.4%	.3%	1.5%
Percent to Gap Year/Other	4.7	7.1%	3.7%	6.2%
Percent to Work Force	3.3%	3.2%	4%	1.5%

And here is the most wonderful news...!

Members of the class of 2010 have elected to matriculate at the following colleges:

NAME OF COLLEGE	NUMBER OF AHS STUDENTS MATRICULATING	STATE
American University	2	DC
Assumption College	1	MA
Ball State University	1	IN
Bay State College	1	MA
Bentley University	2	MA
Binghamton University	1	NY
Boston Architectural College	1	MA
Boston University	6	MA
Brandeis University	2	MA
Bridgewater State College	2	MA
Bryant University	2	RI
Bunker Hill Community College	4	MA
Carleton College	1	MN

Case Western Reserve	1	OH
Champlain College	1	VT
Clark University	3	MA
University of Colorado at Boulder	1	CO
Columbia University	1	NY
Connecticut College	1	CT
University of Connecticut	2	CT
Dean College	1	MA
DePaul University	2	IL
Dickinson College	1	PA
Elon University	1	NC
Emerson College	1	MA
Emmanuel College	2	MA
Endicott College	1	MA
Fitchburg State College	1	MA
Florida Memorial University	1	FL
Framingham State College	2	MA
The George Washington University	1	WDC
Gordon College	1	MA
Greenfield Community College	1	MA
Hamilton College	1	NY
University of Hartford	1	CT
University of Hawaii at Hilo	1	HI
Hobart and William Smith Colleges	1	NY
Hofstra University	1	NY
College of the Holy Cross	3	MA
Ithaca College	1	NY
ITT Technical Institute	1	MA
Johns Hopkins University	2	MD
Lasell College	1	MA
Lesley University	3	MA
Lincoln Technical Institute	1	MA
University College London	1	England-United Kingdom
University of Maine Orono	1	ME
Massachusetts Bay Community College	1	MA
Massachusetts College of Art and Design	3	MA
Massachusetts College of Pharmacy & Health Sciences	3	MA
University of Massachusetts, Amherst	17	MA
University of Massachusetts, Boston	3	MA
University of Massachusetts,	3	MA

Dartmouth		
University of Massachusetts, Lowell	6	MA
Massasoit Community College	1	MA
Merrimack College	1	MA
University of Miami	1	FL
Middlesex Community College	26	MA
University of Minnesota, Twin Cities	1	MN
New Hampshire Institute of Art	1	NH
University of New Hampshire	10	NH
New York University (NYU)	3	NY
Newbury College	3	MA
Nichols College	1	MA
University of North Carolina, Charlotte	2	NC
Northeastern University	9	MA
University of Northern Colorado	1	CO
Northwestern University	1	IL
Oberlin College	3	OH
Ohio Wesleyan University	1	OH
Old Dominion University	1	VA
University of Oregon	1	OR
Pace University	1	NY
Parsons School of Design, New School University	1	NY
Pennsylvania State University, University Park	2	PA
Providence College	1	RI
Quinnipiac University	2	CT
Regis College	1	MA
University of Rhode Island	1	RI
Rochester Institute of Technology	1	NY
University of Rochester	2	NY
Roger Williams University	1	RI
Sacred Heart University	1	CT
Saint Michael's College	1	VT
University of San Diego	1	CA
University of San Francisco	1	CA
Savannah College of Art and Design	1	GA
Simmons College	1	MA
Skidmore College	1	NY
University of South Carolina	1	SC

University of Southern California	1	CA
Southern New Hampshire University	4	NH
Springfield College	1	MA
Stonehill College	1	MA
Suffolk University	3	MA
Trinity College	1	CT
Tufts University	4	MA
Tulane University	2	LA
Union College	1	NY
University of Vermont	12	VT
Wake Forest University	1	NC
Washington College	1	MD
Wellesley College	1	MA
Wesleyan University	1	CT
Westfield State College	6	MA
Williams College	1	MA
University of Wisconsin, Madison	3	WI
Worcester Polytechnic Institute	2	MA

