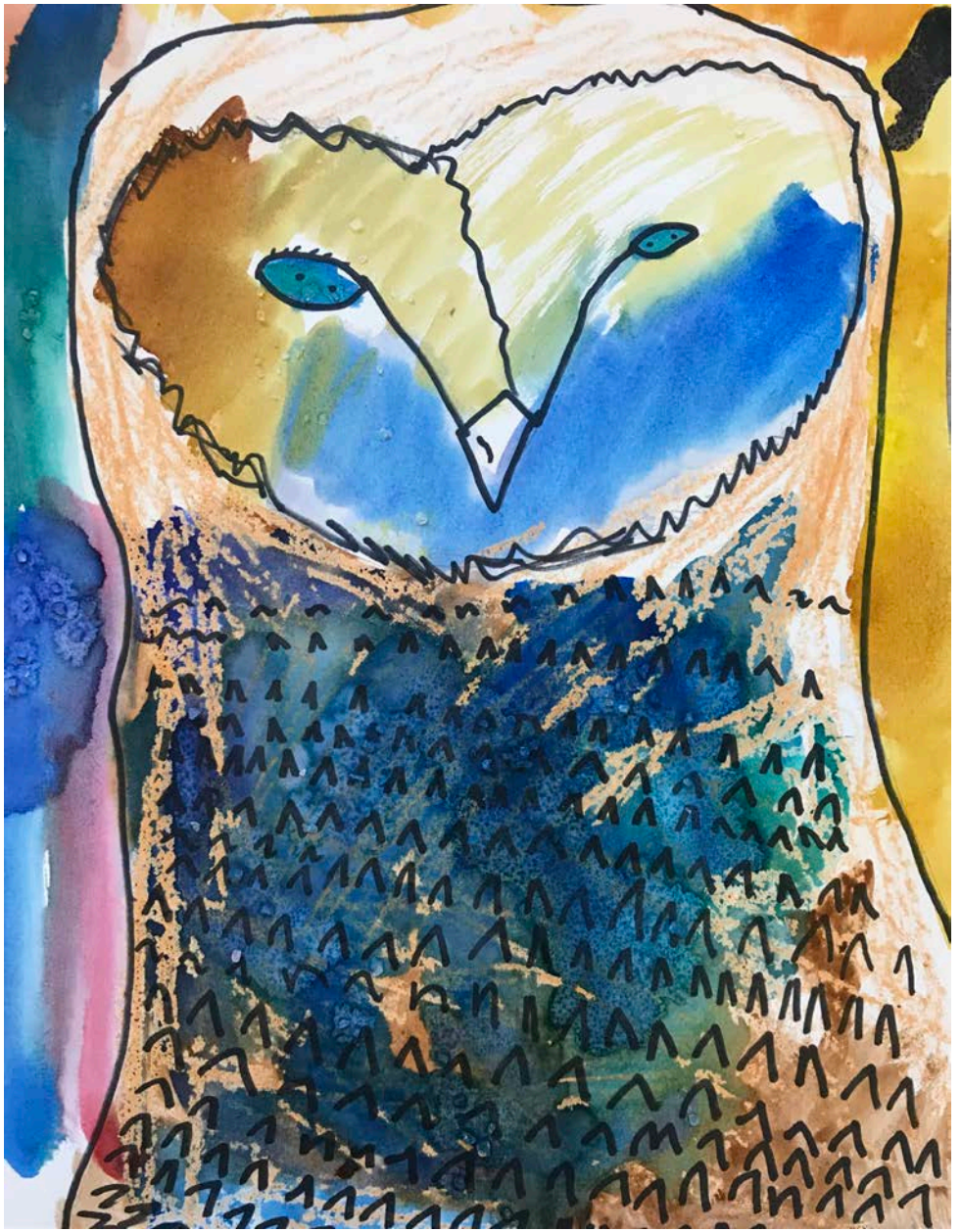


Executive Summary

EXECUTIVE SUMMARY

The Executive Summary Section of the budget is designed to provide a stand-alone section with key components of each major section of the budget document: organizational, financial and informational.

A Message from our Superintendent

The FY'21 Superintendent's Recommended General Fund budget is $42,906,809, an increase of $1,465,418, or 3.54%. The general fund is the largest contributor to the overall school budget.

The budget was developed collaboratively with the Administrative Council[1] following the School Committee Budget Guidelines to:

- Preserve Excellence in Curriculum and Instruction;
- Maintain Safe and Secure Environment and Infrastructure; and
- Maintain the Rate of Budget Growth at a Responsible Level.

These guidelines reflect the Town's desire to maintain the overall strength of the school system by supporting the needs of all students while recognizing continuing local and general economic challenges. The budget funds known collective bargaining contractual obligations; known special education expenses; projected enrollment shifts; class size policy guidelines; and program improvements.

The FY'21 Superintendent's Recommended Budget reflects the following priorities as laid out in the Core Values of the Strategic Plan: The individualized development of each student's academic potential. The development of the whole child, including extracurricular pursuits, emotional intelligence and resilience, and physical well-being. The development of strong citizens who can engage with others in a mutually respectful manner. These recommendations also address the opportunities and implications arising from the projected enrollment. To sustain and improve a high quality of instruction requires adequate resources, diligent hiring practices, rigorous evaluation of teachers and administrators, and highly effective professional development. This commitment to consistency does not mean an end to creativity, innovation or risk-taking by teachers, as those are the hallmarks of excellence in schools and classrooms.

Finally, the FY'21 Superintendent's Recommended Budget document provides a broad view of how the budgeted and expended funds and outcomes we plan to achieve with the support of the community. I look forward to your feedback.

Sincerely,
Dr. Marguerite (Midge) Connolly, Ph.D
Superintendent

[1] The Administrative Council (AC) includes: Superintendent, Assistant Superintendent for Finance and Operations, Assistant Superintendent of Teaching and Learning, Principals, Director of Student Services, Director of Human Resources, Director of Technology and School Libraries and Director of District Advancement.

Weston Public Schools Mission Statement

To educate, equip and inspire all students to achieve their full potential and enrich their communities.

The Weston Public Schools will achieve excellence in learning through collaboration among community, parents, administration, faculty, and students. Recognizing that learning is a lifelong process, all partners in the school community will use imagination, reflection, invention, rational inquiry and judgment to anticipate the demands of the future and to support the learning of others.

The curriculum will include both subject-based and interdisciplinary instruction for grades preK-12. A Weston education will provide students with a broad knowledge base, integrating the arts, technology, communications and core academic areas. Graduates will be able to write and speak effectively, and develop the problem solving and critical thinking skills necessary to participate productively in a constantly changing, culturally diverse and complex world.

The learning environment in Weston will stimulate and support all students in their intellectual, social, emotional, and personal growth to prepare them to become good citizens and to enable them to achieve whatever personal or career goals they pursue. Students will be encouraged to take risks and assume responsibilities; they will respect themselves and others, and be committed to serving the wider community with honesty and integrity.

2020-2021 Budget Guidelines

The School Committee and School Administration has identified system needs to ensure continued excellence. The following general guidelines are meant to assist the School Administration in preparing the budget for fiscal year 2021. These guidelines reflect the Town's desire to maintain the overall strength of the school system.

Preserve Excellence in Curriculum and Instruction
Maintain a Safe and Secure Environment and Infrastructure
Maintain the Rate of Budget Growth at a Responsible Level

A full explanation of the Budget Guidelines is available in the Organizational Section of the budget.

Strategic Planning

In fiscal year 2018, the Weston Public Schools utilized the Massachusetts Department of Elementary and Secondary Education's (DESE) *Planning for Success* model, Weston Public Schools developed a multi-year improvement and annual action plan. The *Planning for Success* model incorporates legislative requirements, educator evaluation expectations and effective planning practices in its design. [2] The district contracted with Creative Coaching, Dr. Lori Likis, to guide the district.

In summary, the district planning process includes the following steps[3]:

Create Plan	• Envision the future • Analyze district performance, educator evaluation, and community feedback data for trends and patterns • Backward design the improvement strategy from specific, desired student outcomes, researching effective practices
Align Systems	• Connect educator evaluation goals and school improvement plans to the district plan • Leverage budget, grants, and resources in support of the district plan • Build community commitment to the district plan
Implement	• Create an annual action plan with progress and impact benchmarks • Monitor and publicly report on progress • Redesign the district plan if necessary

While the plan is being implemented, the strategic goals for this school year continue to include:

Goal One: Professional Practice Goal - Management and Guidance

- During the 2019-2020 school year, the Superintendent will further the implementation of the District Strategic Plan by overseeing the action plans of the aligned 2019-2020 School Improvement Plans.
- During the 2019-2020 school year, Administrators and teachers that were trained in the Data Wise Process at Harvard University will continue to strengthen instructional practices, in the Data Wise Process, thereby building capacity to consistently use data to inform instruction. The Superintendent and Asst. Superintendent of Teaching and Learning have attended numerous data-driven meetings monthly in all buildings.
- Hire new high school principal by March 2020. This process will include a variety of stakeholders and opportunities for involvement. A timeline will be presented by November 2019.
- The Superintendent will meet with Administrative Team twice a month, and as needed to provide team building, professional development, and address district issues, concerns and initiatives. In the summer of 2019, Administrators were given an opportunity to provide feedback about the Superintendent's performance through a survey. The purpose of this feedback is to inform the goals set within this document.
- Further develop district-wide and school-based communication practices, including creation of periodic newsletters from central administration, and evaluation of both school-based communication and communication to and from the community at large.
- During the 2019-2020 school year, Central Administrators will research and develop strategies to more effectively and efficiently ensure appropriate staffing and student-learning opportunities are maintained.
- During the 2019-2020 school year, Central Administrators will research and develop strategies to more effectively and efficiently present and review the school budget for the 2020-2021 school year.

[2] Massachusetts Department of Elementary and Secondary Educations' web site: http://www.doe.mass.edu/research/success/
[3] Massachusetts Department of Elementary and Secondary Educations' web site: http://www.doe.mass.edu/research/success/

Goal Two: Professional Practice Goal - Professional Development

- The Superintendent will engage in personal professional development to (i) strengthen financial reporting and budget competencies; (ii) examine best practices in district-wide and community communications; and (iii) strengthen background in educational best practices with a focus on social emotional learning and differentiation.

Goal Three: Student Learning Goals

- By mid-November, responses to the Homework and Start Time survey will be analyzed, shared, and used to determine changes or enhancements, if any, to current practice.
- During the 2018-2019 school year and over Summer 2019, 80 % of educators in grades PK-8 participated in Responsive Classroom professional development. By June 2020, 100% of educators in grades PK-8 will have participated in Responsive Classroom training. 50% of educators in grades 9-12 will be trained in practices that promote equity and inclusion (with a later summer training for additional high school educators). The expectation for all educators is to implement the strategies once trained. By June 2020, the administrative team will collect data about the effects of the implementation.
- During the 2019-2020 school year, continue to support differentiation practice and curriculum alignment at all grade levels and content areas, including the continued integration of the recently adopted elementary reading and writing curricula. By June 2020, the administrative team will collect data and exemplars in the Weston Public Schools that supports differentiation and greater alignment.
- By June 2020, administrators will participate in ongoing professional development regarding cultural competencies and related best practices to lead this work in their respective leadership roles.
- Throughout the 2019-2020 school year, supervise efforts by all Administrators, town safety officials, facilities and other community members to continue to evaluate and improve building safety and protocols.

Budget Process

Operating Budget:

There are several key steps in the development of the budget. Some include the submission of the October 1 Current and Projected Enrollment report. This report is submitted to the School Committee for review and approval in October or November of each year. The data presented in this report becomes the basis for the FY'21 Budget "A" submission to the School Committee. This report is the initial review of the budgetary needs and challenges of the district in the upcoming year. The Town Manager incorporates the Budget "A" projections into the Financial Summit presentation to the Town's Finance Committee, Selectmen, School Committee and Town and School Administration. This meeting, in late October, provides a first glance into the current and future budget projections.

The Assistant Superintendent for Finance and Operations provides access to the web-based budget development program to members of the Leadership Team[4] at the end of October. The web-based system is closed for entry around the middle of November. Throughout November and December, the Superintendent and the Administrative Council review the programmatic and financial implications of all requests. By mid-December, the Superintendent determines the size and scope of the budget. In early January, the Superintendent's Recommended Budget is submitted to the School Committee for consideration. The School Committee's Finance Subcommittee and the Town's Finance Committee members assigned to the school budget review it in detail and hold public hearings. In late February or early March, the School Committee votes on the budget. In mid-May, the budget is presented to Town Meeting for approval. Once approved, the budget is implemented for the fiscal year beginning on July 1st.

Capital Budget:

The Capital Improvement Program (CIP) budget process is conducted simultaneously with the operating budget process in Weston. The process begins in October with the dissemination of the previous year's 5-year CIP forms. These forms include the project title, description, effect on existing programs, effect on other departments, related acquisition and improvement requests, and proposed funding sources. Anticipated use and life expectancy is also reviewed and updated. Projects not yet on the 5-year plan are added, typically 5-10 years out. In early November, the School Department makes recommendations to the School Committee for review and approval. In mid to late November, the approved CIP projects are submitted to the Town Manager for review in a prioritized order. The School Committee and Administration review the CIP recommendations with the Town Manager in January and the Finance Committee in February. School capital budget requests are included in the Town Manager's Recommended CIP. In May, Town Meeting is presented with the warrants for each project put forward in the Town Manager's CIP for the upcoming fiscal year. A School Committee member presents the proposed warrant articles at Town Meeting. Projects with a two-thirds majority are funded. Once approved, the school is responsible to providing the Town Treasurer a projected cash flow for each approved project. Items not approved at Town Meeting are reviewed and potentially re-submitted on a future CIP submission.

The Town's Reserve Policy is reviewed and either affirmed or revised by the Board of Selectmen every five years. In April 2017, the Reserve Policy was revised. The Facilities Maintenance Reserve is used for the replacement and repair of buildings and equipment based on a five-year "cash capital" plan recommended by the Facilities Director. This is a continuing balance account, so unexpended balance carries forward to subsequent years and is carried on the Town's general ledger

[4] The Leadership Team includes Central Office Administrators, Principals, Elementary Curriculum Specialists, K-12 Directors, 6-12 Department Heads, and Director of Health Services.

but benefits the schools as part of the Town in support of schools' budget. The reserve target is 1% of the Town's total insured building value. Until the target is met, the appropriation is expected to increase by 6% or greater on an annual basis. The reliance on capital outlays are reserved for building projects rather than building maintenance, school vehicles and school technology.

Budget Calendar

July • Fiscal year begins on July 1st • Capital cash flow projections are submitted to the Town Treasurer	**January** • FY'21 Superintendent's Recommended Budget is presented to the School Committee • Budget review sessions
August • Prior fiscal year is closed	**February** • Budget meetings with School Committee's budget sub-committee and with the Town's Finance Committee • School Committee conducts budget hearings
September • Budget Guidelines and Strategic Plan are reviewed with School Committee • Budget Guidelines for FY'21 are approved by the School Committee	**March** • School Committee approves FY'21 Recommended Budget
October • FY'21 Budget development process opens to Leadership • FY'21 Capitaql budget requests are distributed by the Town Manager • Town/School Financial Summit	**April** • FY'21 Budget summary is available online for all residents to read about the highlights of the recommended budget in advance of the Town Meeting vote
November • School Committee receives financial reports: - Current FY'20 and projected FY'21 enrollment - FY'21 Budget 'A' • FY'21 Budget development closes to Leadership • Admin Council Review	**May** • Town Meeting Approval (Capital and Operating)
December • FY'21 Internal budget deliberations	**June** • Approved budget is provided to all department managers

District Personnel (Trends and Forecast)

The number of personnel employed by the district is variable. The main drivers of the number of employees in a school district include: in-house versus contract services (i.e. transportation, food services and custodial); number of students; class size; intervention programs offered; student needs (i.e. special education requirements); and administrative support. In Weston, we value in-house services; and therefore, school bus drivers, food service staff and custodial, maintenance and grounds staff are district employees. Below is a four-year summary of the full-time equivalents, including all funding sources, by unit:

	Total Staffing				Variance	Variance
Personnel Units	**FY'18 FTE Actual**	**FY'19 FTE Actual**	**FY'20 FTE Approved Budget**	**FY'21 FTE Proposed**	***One Year FY'21-FY'20***	***Four Years FY'21-FY'18***
Weston Education Association	248.9510	248.6930	247.2575	241.0575	*(6.2000)*	*(7.8935)*
Weston Aides and Paraprofessional Assoc.	30.4390	30.4390	30.2598	27.1973	*(3.0625)*	*(3.2417)*
Weston Education Administrative Asst. Assoc.	20.5200	16.3885	16.3885	15.6742	*(0.7143)*	*(4.8458)*
AFSCME Buildings and Grounds	30.0000	30.0000	30.0000	30.0000		-
Weston School Bus Driver Association	19.8250	19.5560	21.0105	21.0105		*1.1855*
System Wide Non-Unit Personnel	21.5040	21.7510	22.7510	22.7510		*1.2470*
Non-Unit Personnel Learning Assistants	54.1530	56.4300	60.6235	56.9675	*(3.6560)*	*2.8145*
AFSCME Cafeteria	20.1800	20.1800	20.1800	20.1800		-
Totals	**445.5720**	**443.4375**	**448.4708**	**434.8380**	**(13.6328)**	**(10.7340)**

The School Committee negotiates with six[5] separate collective bargaining unions every three years. We have completed negotiations with four of the six collective bargaining units. Other contractual costs such as steps and lanes, longevity, professional development, tuition reimbursement, etc. add to the annual costs of each contract. Below is a summary of full-time equivalents in steps and at top step as of January 2, 2020 (fiscal year 2020 data). Steps are a significant budgetary impact on an annual basis so the cost of the steps for fiscal year 2020 are included as a reference point.

	Total Staffing			
Personnel Units	**FY'20 FTE Approved Budget**	**FTE in Steps below Top Step**	**FTE at Top Step**	***FY'21 Impact of Steps***
Weston Education Association	247.2575	81.625	165.633	*$ 386,888*
Weston Aides and Paraprofessional Assoc.	30.2598	1.942	28.318	*$ 1,843*
Weston Education Admin. Asst. Assoc.	16.3885	2.084	14.304	*$ 11,750*
AFSCME Buildings and Grounds	30.0000	7.000	23.000	*$ 12,443*
Weston School Bus Driver Association	21.0105	0.000	21.011	$ -
System Wide Non-Unit Personnel	22.7510	0.000	22.751	$ -
Non-Unit Personnel Learning Assistants	60.6235	22.288	38.336	*$ 40,592*
AFSCME Cafeteria	20.1800	8.183	11.997	*$ 7,432*
Totals	**448.471**	**123.121**	**325.350**	***$ 460,948***

Employees not covered by a collective bargaining agreement include district and building level administrators, learning assistants, information technology staff, substitutes, and literacy and math intervention support staff.

[5] Weston Education Association (Teachers, Nurses, METCO Liaisons, Athletic Trainer, Occupational Therapists, Physical Therapists); Weston Education Administrative Assistants Association; Weston Aides and Paraprofessionals; American Federation of State, County and Municipal Employees (AFSCME) for Custodians and Cafeteria; and the Weston School Bus Driver Association.

School Committee and Central Administration

The School Committee has the power to select and to terminate the superintendent, review and approve the budget, and establish educational goals and policies for the schools in the district consistent with the requirements of law and statewide goals and standards established by the board of education.

School Committee Voting Members:

John Henry, Chair (Current Term: 2018 - 2021)
Danielle Black, Vice Chair (Current Term: 2017 - 2020)
Alexander Cobb (Current Term: 2018 - 2021)
Anita Raman (Current Term: 2019 - 2022)
Rachel Stewart (Current Term: 2019 - 2022)

School Committee Non-Voting Members:

Dr. Marguerite (Midge) Connolly, Superintendent
Sheri-Lynne Matthews, Asst. Superintendent for Finance and Operations
Dr. James (Kimo) Carter, Asst. Superintendent of Teaching and Learning
Allison Kirk, Student Advisory Council Representative
Jacqueta Oliver Bigby, Co-METCO Representative
Onika Jenkins, Co-METCO Representative

School Administrators (not listed above):

Jennifer Faber, Woodland School Principal
John Gibbons, Weston Middle School Principal
Daniel Green, Field School Principal
Erin Maguire, Country School Principal
Anthony Parker, Weston High School Principal

Dr. Lee McCanne, Director of Technology and School Libraries
Jennifer Truslow, Director of Student Services
Timothy Heavey, Director of Human Resources
Amy Kelly, Director of District Advancement
Anne Zernicke, Asst. Director of Student Services

Financial Overview: All Funds

The FY'21 Superintendent's Recommended Budget includes summary and detailed information about all funding types: general fund, grant funds, revolving funds,[6] capital funds and Town of Weston funds. Local property taxes and state education aid (Chapter 70) are the primary revenues sources for the general fund. Grant fund revenue can be derived from federal, state or local grants. Revolving fund revenue is directly related to the purpose of the specific fund. For example, revenue received through athletic event ticket sales is deposited to the athletic revolving fund. Capital funds are bond issuances and cash capital. Below is an overview of the Weston Public Schools budget.

Revenue	FY'17 Actual	FY'18 Actual	FY'19 Actual	FY'20 Approved Budget	FY'21 Recommended Budget	$ Inc / (Dec)	% Inc / (Dec)	% of Total FY'21 Budget
General Fund	$38,746,641	$39,079,529	$40,099,468	$41,441,391	$ 42,906,809	$ 1,465,418	3.54%	65.76%
Grant Fund	$ 2,043,758	$ 1,842,495	$ 2,266,174	$ 2,639,487	$ 2,269,344	$ (370,143)	-14.02%	3.48%
Revolving Fund	$ 2,881,863	$ 2,637,189	$ 2,641,316	$ 2,416,850	$ 2,707,000	$ 290,150	12.01%	4.15%
Capital Fund	$ 5,103,352	$ 5,047,327	$ 4,829,229	$ 5,321,071	$ 4,922,497	$ (398,574)	-7.49%	7.54%
Town of Weston	$11,145,579	$12,265,747	$11,404,262	$12,070,209	$ 12,444,256	$ 374,047	3.10%	19.07%
Total	**$59,921,193**	**$60,872,287**	**$61,240,449**	**$63,889,008**	**$ 65,249,906**	**$ 1,360,898**	**2.13%**	**100.00%**

Expenditures	FY'17 Actual	FY'18 Actual	FY'19 Actual	FY'20 Approved Budget	FY'21 Recommended Budget	$ Inc / (Dec)	% Inc / (Dec)	% of Total FY'21 Budget
General Fund	$37,836,531	$38,204,364	$39,488,062	$41,441,391	$ 42,906,809	$ 1,465,418	3.54%	66.26%
Grant Fund	$ 2,040,625	$ 1,956,203	$ 1,976,352	$ 1,780,722	$ 1,770,000	$ (10,722)	-0.60%	2.73%
Revolving Fund	$ 2,624,349	$ 2,794,923	$ 2,362,461	$ 2,407,000	$ 2,707,000	$ 300,000	12.46%	4.18%
Capital Fund	$ 5,103,352	$ 5,047,327	$ 4,829,229	$ 5,321,071	$ 4,922,497	$ (398,574)	-7.49%	7.60%
Town of Weston	$11,145,579	$12,265,747	$11,404,262	$12,070,209	$ 12,444,256	$ 374,047	3.10%	19.22%
Total	**$58,750,436**	**$60,268,564**	**$60,060,366**	**$63,020,393**	**$ 64,750,562**	**$ 1,730,169**	**2.75%**	**100.00%**

General Fund:

The general fund is the main contributor of funds for the district. It is used to account for all financial resources except those required to be accounted for in another fund. The revenue is derived from two primary sources of revenue: local property taxes and state education aid (Chapter 70). The budget assumes the level funding of state education aid (Chapter 70) as these numbers are not available until late spring. The FY'21 Superintendent's Recommended Budget reflects an increase of $1,465,418, or 3.54% over fiscal year 2020.

Grant Funds:

The grant fund is comprised of 8 federal grants (current year and carry forward), 2 state grants, and 2 private grants in fiscal year 2020. Federal carry forward grants, such as the Special Education I.D.E.A., Title I, and Title IIA grants, expire at the end of this school year (June 30, 2020). Therefore, federal carry forward grants are not budgeted for in fiscal year 2021. Private grants are expected to be similar next year. The FY'21 Superintendent's Recommended Budget reflects a level funding of all current year federal grants.

[6] A revolving fund, "Allows a community to raise revenues from a specific service and use those revenues without appropriation to support the service." Massachusetts Department of Revenue.

Revolving Funds:
The revolving fund is comprised of 14 separate and distinct accounts. The National School Lunch Program is the largest fund with revenue and expenses in excess of $1.0 million annually. High cost special education costs are partially reimbursed through the Circuit Breaker account. Other accounts include pre-school, athletics and facility rental.

Capital Fund:
Massachusetts General Law Chapter 44 sections 7 and 8 allow municipalities to incur debt for long term assets and projects, such as, equipment purchases, construction and reconstruction, remodeling, land acquisitions, and pavement/resurfacing. The Town of Weston's Debt Policy (Policy Number 2007.001) limits debt to projects authorized under M.G.L. Ch. 44 sections 7 and 8; debt length equal to or less than the project's useful life; and appropriate debt levels so that the AAA bond rating is not jeopardized. Debt service exceeding 15 percent of operating revenues is considered a warning indicator by the credit rating agencies. To avoid going over the 15 percent guidelines, the Town has been careful to plan new debt as old debt is expiring. In general, the capital budget is reserved for building projects and the operating budget covers vehicles, technology and building maintenance needs.

In the May 2006 Town Meeting, the Permanent Building Committee (PBC) bylaw was accepted. The PBC is responsible for the execution of major construction and maintenance projects for the Town and Schools. The PBC works closely with the Director of Facilities for the Town and Schools to create and maintain a 20-year facility improvement plan based on the life cycle of the major systems. Maintaining long-term replacement schedules assists the Town in planning debt schedules over the next 5 to 20 years.

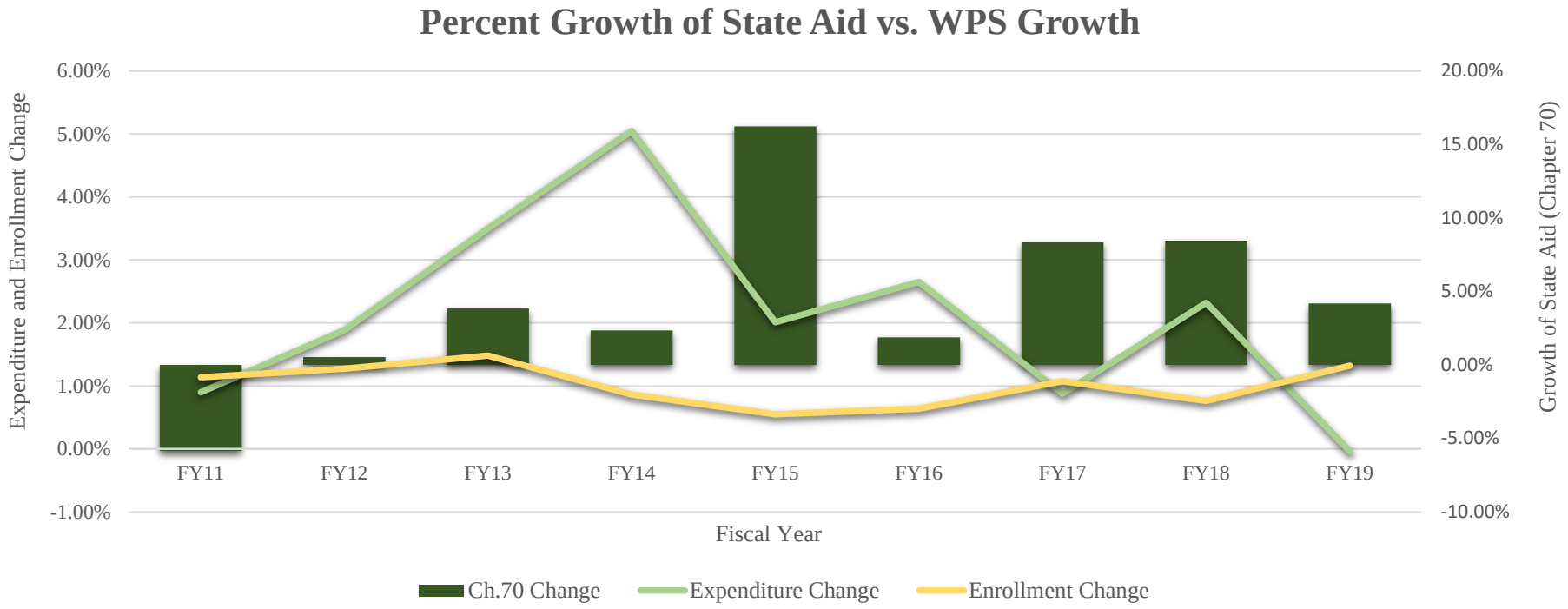
Town of Weston:
The Town of Weston carries several costs that directly support the schools. Municipalities can make individual decisions about where to budget these and other related and/or shared expenses. The costs covered by the town budget include employee and retiree health insurance, OPEB (Other Post-Employment Benefits), non-professional staff retirement[7], non- capital building and grounds maintenance, bus maintenance, workers' compensation, property and liability insurance, etc. In Weston, the budgeting for these items are consistent with other town departments including Police, Fire, and Department of Public Works. When expenses related to the schools are carried in the Town budget, the revenue and expenses are shown in the 'Town of Weston' category. The increase in fiscal year 2021 represents the revised commitment to increasing the maintenance budget on the Town's general fund by 6% annually.

In Massachusetts, and specifically in Weston, the Open Town Meeting form of government provides opportunities for all registered voters to decide on multiple facets of the school and municipal budget.

Significant Trends:

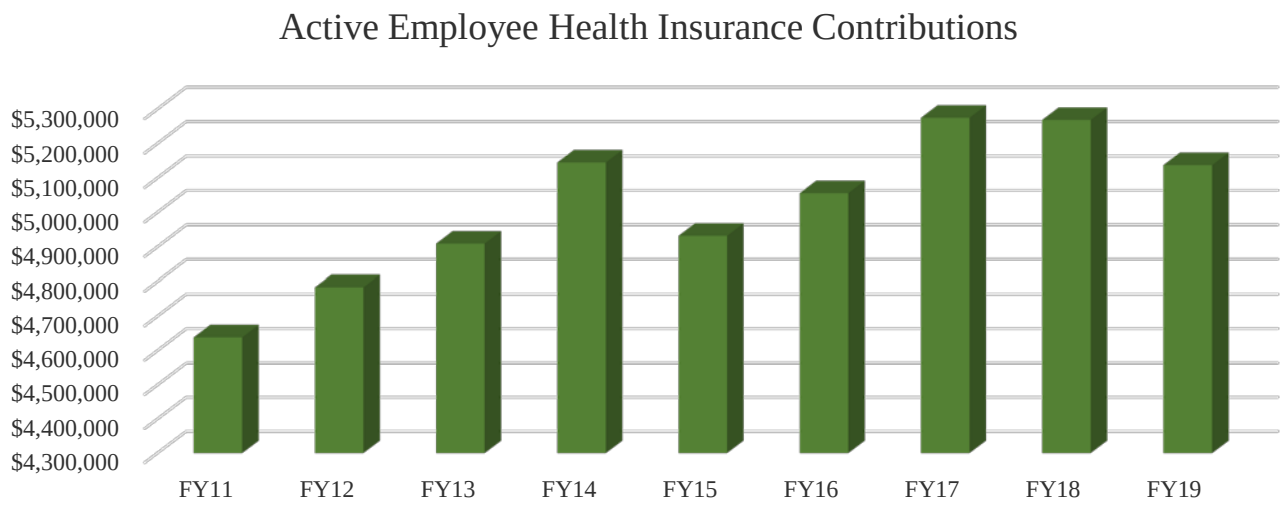
State Education Aid:

In the early part of the decade local aid, and particularly education aid (Chapter 70), was reduced significantly. In recent years, Weston has benefitted from increases to the Chapter 70 allocation. Between fiscal year 2014 and fiscal year 2019, Chapter 70 education aid to Weston has increased by 45.85% ($2.55M to $3.73M). During the same period, the rate of growth in overall spending has been 12.95% while enrollment has declined by 10.19%. The rate of spending growth has seen a decline in recent years with a -.04% growth in FY'19.



Active and Retiree Health Insurance:

Employee and retiree health costs continue to rise. The Town has worked collaboratively with all town and school unions to implement cost-saving measures. These cost-saving measures include joining the state's Group Insurance Commission (GIC), increasing employee contribution rates, and instituting an opt-out payment. The Town pays $2,000 for an individual plan and $4,000 for a family plan to active employees and retirees who have been insured under the Town's health insurance program for twenty-four (24) consecutive months and opt-out of being covered through Town plans.



The reduction in the health insurance costs in FY'15 was a result of the employee contribution increase of 2% to a new split of:

HMO Plans: PPO Plans: Indemnity Plans:

85% Town / 15% Employee
87% Town / 13% Employee
65% Town / 35% Employee

These splits are in effect through June 30, 2021.

Financial Overview: General Fund

Although the budget document includes summary and detailed revenue and expense information on all fund types, the general fund budget is the focus of the FY'21 Superintendent's Recommended Budget. The General Fund budget is the amount voted by the residents of Weston at the May Town Meeting.

Category	FY'17 Actual	FY'18 Actual	FY'19 Actual	FY'20 Adjusted Budget	FY'21 Recommended Budget	$ Change	% Change	% of Total FY'21 Budget
Salary and Other Compensation	$32,877,896	$32,860,789	$34,011,000	$35,888,565	$ 36,528,392	$ 639,827	1.78%	85.13%
Instructional Materials and	$ 1,217,417	$ 1,352,735	$ 1,230,275	$ 1,405,421	$ 1,388,947	$ (16,474)	-1.17%	3.24%
Contracted Services	$ 969,027	$ 1,219,540	$ 1,190,242	$ 1,199,760	$ 1,334,650	$ 134,890	11.24%	3.11%
Contracted Student Services	$ 2,769,254	$ 2,882,482	$ 2,771,952	$ 3,155,497	$ 3,756,602	$ 601,105	19.05%	8.76%
Utilities	$ 1,214,129	$ 1,223,197	$ 1,198,274	$ 1,190,697	$ 1,314,440	$ 123,743	10.39%	3.06%
Equipment and Vehicles	$ 691,225	$ 560,116	$ 768,440	$ 530,681	$ 593,303	$ 62,622	11.80%	1.38%
State Aid and Offset Accounts	$ (1,902,417)	$ (1,894,495)	$ (1,682,122)	$ (1,929,230)	$ (2,009,525)	$ (80,295)	4.16%	-4.68%
Total	**$37,836,531**	**$38,204,364**	**$39,488,062**	**$41,441,391**	**$ 42,906,809**	**$ 1,465,418**	**3.54%**	**100.00%**

Key Budgetary Issues: General Fund

The FY'21 Superintendent's Recommended Budget is $42,906,809, an increase of $1,465,418 or 3.54%. The highlights of the budget include:

Salary and Other Compensation……$639,827

Negotiations for all six collective bargaining agreements began in fiscal year (2019). We have successfully completed 4 collective bargaining agreements. The projected enrollment for fiscal year 2021 shows the ability to reduce a section in Grade 8. With our declining enrollments, the Superintendent and two Assistant Superintendent's had many thoughtful conversations with Principals, Directors and Department Heads. While looking at class sizes and still staying within the policy guidelines, we were able to reduce FTE's without impact on programming or student choice. Please keep in mind that student needs can change at any time and per IEP obligations, we may have to adhere to additional learning assistants.

Instructional Materials and Supplies……*($16,474)*
The FY'21 budget includes a new employee interface module. We took out the funding for the replacement textbooks purchased in fiscal year 2020.

Contracted Services……*$134,890*
The FY'21 budget includes new DiLL Language Lab Software https://www.swifteducation.com, The cost estimation for 30 student stations, 1 teacher station, maintenance and support plan and new headphones is approximately $25,550. This increase also includes a SeeSaw license, https://web.seesaw.me/seesaw-for-schools, for the lower elementary schools. This cost is estimated at $2,000 per school. We will be incorporating a new Employee Portal Interface. This will allow employees to log in, get vital payroll, benefits and accrual information. This cost is estimated at $20,500. Our copier leases are up within this fiscal year. The increase for changing over the machines is approximately $3,000. Under our Technology Department, we had a 3-year free service agreement which is up at the end of this fiscal year. Districtwide, this is a $19,200 cost. Our 3-year fire wall renewal is approximately $7,000. Finally, our Athletic Dept. transportation services needed to be increased, more to actual, based on participation and need. This is a $30,000 increase.

Contracted Student Services……*$601,105*
The FY'21 budget includes all expected cost increases in out-of-district tuitions as recommended by the Operational Services Division (OSD). The OSD serves both Business and Government customers managing the Commonwealth of Massachusetts' COMMBUYS Procurement Market Center https://www.commbuys.com/bso/. This increase also covers out placement costs incurred after the approval of the fiscal year 2020 budget.

Utilities……*$123,743*
The FY'21 budget includes changes to natural gas, electricity and water based on recent usage data. The primary reason for the large increase in utilities stems from the electricity solar credits that are no longer embedded in our FY'21 budget. The town will be recording the solar credits within their overall budget, therefore, we had to gross up our actual costs. Gasoline and diesel projections will be updated once the contracts are awarded for FY'21 in late January to early February.

Equipment and Vehicles……*$62,622*
This number reflects an annual increase for the three bus replacements each year. It also reflects an increase in Districtwide Technology as some of our equipment has come to its life expectancy limit.

State Aid and Offset Accounts……*($80,295)*
Based on fiscal year 2019 receipts and anticipated fiscal year 2020 receipts, we are able to increase our offsets for fiscal year 2021. Although we are no longer receiving the solar credits, our Circuit Breaker reimbursement is projected to increase.

- All one-time fiscal year 2020 expenses have been removed from fiscal year 2021, such as Middle School textbooks and microscopes for the High School.

District Finances (Trends and Forecast)

Although the forecast may change based on the strategic plan currently being implemented, all known and anticipated changes are included in the forecast. Instructional staff changes are based on anticipated enrollment changes that align to the School Committee's class size policy. State grants are more vulnerable to significant changes year to year. Federal grants have been more predictable year to year and we expect this to continue into the next five years. Several large building projects bond authorizations are expiring and a few new projects are being explored to meet potential future needs.

Revenue	FY'17 Actual	FY'18 Actual	FY'19 Actual	FY'20 Approved Budget	FY'21 Recommended Budget	FY'22 Forecast	FY'23 Forecast	FY'24 Forecast	FY'25 Forecast
General Fund	$38,746,641	$39,079,529	$40,099,468	$41,441,391	$ 42,906,809	$43,830,511	$44,777,305	$45,747,769	$ 46,742,494
Grant Fund	$ 2,043,758	$ 1,842,495	$ 2,266,174	$ 2,639,487	$ 2,269,344	$ 2,211,294	$ 2,204,265	$ 1,972,255	$ 1,965,266
Revolving Fund	$ 2,881,863	$ 2,637,189	$ 2,641,316	$ 2,416,850	$ 2,707,000	$ 2,563,501	$ 2,560,013	$ 2,566,536	$ 2,563,071
Capital Fund	$ 5,103,352	$ 5,047,327	$ 4,829,229	$ 5,321,071	$ 4,922,497	$ 4,641,788	$ 4,485,448	$ 4,359,718	$ 4,023,613
Town of Weston	$11,145,579	$12,265,747	$11,404,262	$12,070,209	$ 12,444,256	$12,830,843	$13,230,417	$13,643,440	$ 14,070,396
Total	**$59,921,193**	**$60,872,287**	**$61,240,449**	**$63,889,008**	**$ 65,249,906**	**$66,077,937**	**$67,257,448**	**$68,289,718**	**$ 69,364,840**

Expenditures	FY'17 Actual	FY'18 Actual	FY'19 Actual	FY'20 Approved Budget	FY'21 Recommended Budget	FY'22 Forecast	FY'23 Forecast	FY'24 Forecast	FY'25 Forecast
General Fund	$37,836,531	$38,204,364	$39,488,062	$41,441,391	$ 42,906,809	$43,822,845	$44,838,091	$45,715,567	$ 46,775,249
Grant Fund	$ 2,040,625	$ 1,956,203	$ 1,976,352	$ 1,780,722	$ 1,770,000	$ 1,715,000	$ 1,715,000	$ 1,715,000	$ 1,715,000
Revolving Fund	$ 2,624,349	$ 2,794,923	$ 2,362,461	$ 2,407,000	$ 2,707,000	$ 2,756,538	$ 2,806,983	$ 2,858,351	$ 3,095,594
Capital Fund	$ 5,103,352	$ 5,047,327	$ 4,829,229	$ 5,321,071	$ 4,922,497	$ 4,641,788	$ 4,485,448	$ 4,359,718	$ 4,023,613
Town of Weston	$11,145,579	$12,265,747	$11,404,262	$12,070,209	$ 12,444,256	$12,830,843	$13,230,417	$13,643,440	$ 14,070,396
Total	**$58,750,436**	**$60,268,564**	**$60,060,366**	**$63,020,393**	**$ 64,750,562**	**$65,767,014**	**$67,075,939**	**$68,292,076**	**$ 69,679,852**

Significant Trends:

Collective bargaining agreements: All six collective bargaining agreements expired at the end of fiscal year 2019. The Weston School Bus Drivers Association (WSBDA), the Weston Education Administrative Assistant Association (WEAAA), the American Federation of State, County and Municipal Employees (AFSCME Cafeteria), and the Weston Education Association (WEA) have all settled their collective bargaining agreements. The American Federation of State, County and Municipal Employees (AFSCME Custodian) and the Weston Aides and Paraprofessional Association (WAPA) are still in negotiations.

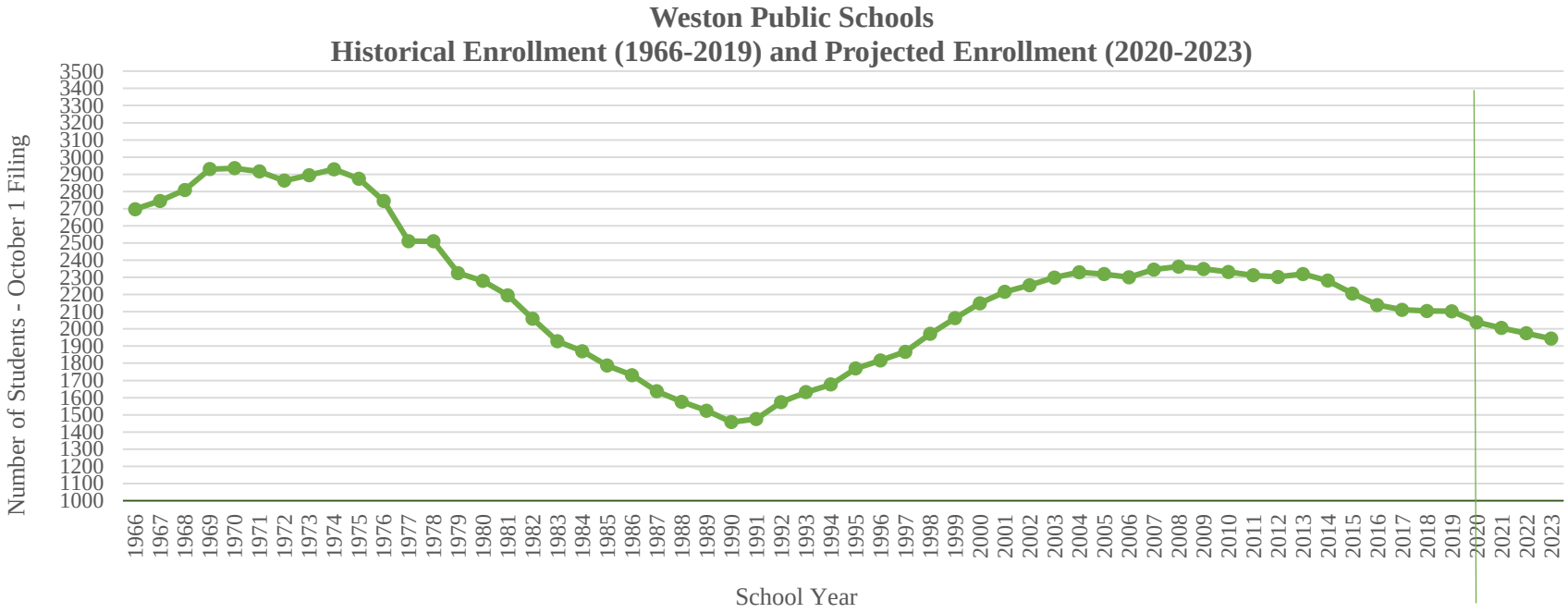
Enrollment decline: Since school year 2012-2013, there has been a gradual decrease in enrollment. Over the past five years, our enrollment has dropped by 142 students. This gradual decrease is forecasted to continue into the near future.

Affordable housing: Massachusetts General Law, Chapter 40B, is designed to facilitate construction of affordable housing in communities where less than 10 percent of its housing stock is affordable (accessible to low and moderate-income levels). Weston's affordable housing stock is less than 4 percent as defined by the state. Under Chapter 40B, developers can ignore certain zoning laws, including specifically the allowable density, as long as 20 to 25 percent of the units being built meet the state's definition of affordable. The town is currently evaluating a number of 40B proposals that, if completed, could impact school enrollment. More information about the current proposals can be found on the town's website.

District Enrollment (Trends and Forecast)

Weston Public Schools reports student enrollment and demographic data to the Massachusetts Department of Elementary and Secondary Education (MA DESE) three times a year: October 1, March 1 and Year End. The October 1 numbers are used to determine staffing for the Superintendent's Recommended Budget. Weston utilizes the cohort survival method, a commonly used projection methodology among school districts throughout the country. The table below includes enrollment in pre-Kindergarten through Grade 12.

The cohort survival method utilizes historical enrollment data by grade to calculate a ratio of the number of students in a particular grade in one year to the number of students in that grade from the previous year. Kindergarten projections are typically based on the number of live births reported by the Massachusetts Department of Public Health five years prior. For school year 2020-2021, the Kindergarten projection is based on the birth to kindergarten ratio from school year 2019-2020 of 2.21. Three ratios are developed: 3-year average, 5-year average and 10-year average. Based on available demographic and community data, a ratio is chosen for the upcoming school year. This ratio is applied to the current enrollment (October 1 figures) to calculate the upcoming school year projections.



Enrollment Highlights:

Historical High: Year: 1970
Number of Students: 2,935

Historical Low: Year: 1990
Number of Students: 1,458

Current Year: Year: FY2020
Number of Students: 2,039

Projected Enrollment in 2023: Number of Students: 1,943

Average Enrollment: FY66 thru FY20
Number of Students: 2,214

Property Tax Base and Rate Trends

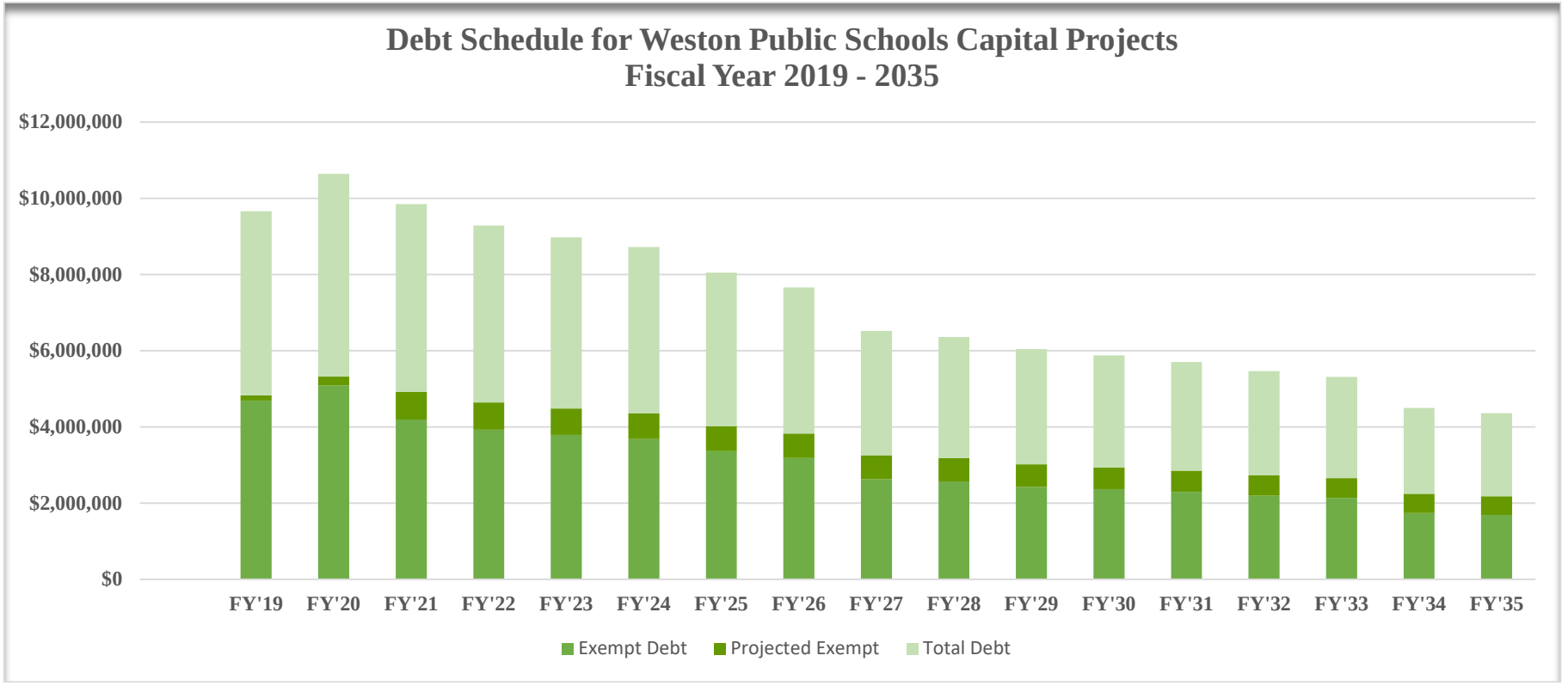
Weston relies heavily on local revenue sources to fund the public schools. In 1980, a ballot initiative in Massachusetts to limit the growth of local property taxes passed. This law, referred to Proposition 2½ [9], went into effect in 1982. Essentially, the personal property tax may not increase more than 2.5% of the prior year's levy limit, plus new growth and any overrides or exclusions. A community may vote to allow for a Proposition 2½ override vote to permanently increase the tax burden. Below is a table showing the historical property valuations and tax rates:

	FY'13	FY'14	FY'15	FY'16	FY'17	FY'18	FY'19	FY'20
Population[10]	11,608	11,580	11,581	11,391	11,472	11,389	11,486	11,138
Number of Voters[11]	7,264	7,860	8,179	8,008	8,442	8,312	8,312	8,049
Valuation of Real Estate	$5,151,565,800	$5,292,759,000	$5,565,225,800	$5,811,898,500	$5,881,989,600	$5,952,190,900	$6,106,168,300	$6,190,659,400
Valuation of Personal Property	$43,864,400	$48,169,200	$47,169,200	$49,587,500	$59,025,200	$63,924,000	$69,551,400	$71,681,100
Total Assessed Valuation	$5,195,430,200	$5,340,928,200	$5,612,459,200	$5,861,486,000	$5,941,014,800	$6,016,114,900	$6,175,719,000	$6,262,340,500
Tax Rate per $1,000 Valuation	$12.40	$12.73	$12.28	$12.16	$12.40	$12.51	$12.59	$12.83

[9] Massachusetts General Law Ch. 59 § 21C
[10] Town of Weston census data as of January 1st.
[11] Town of Weston, number of registered voters as of December 31st.

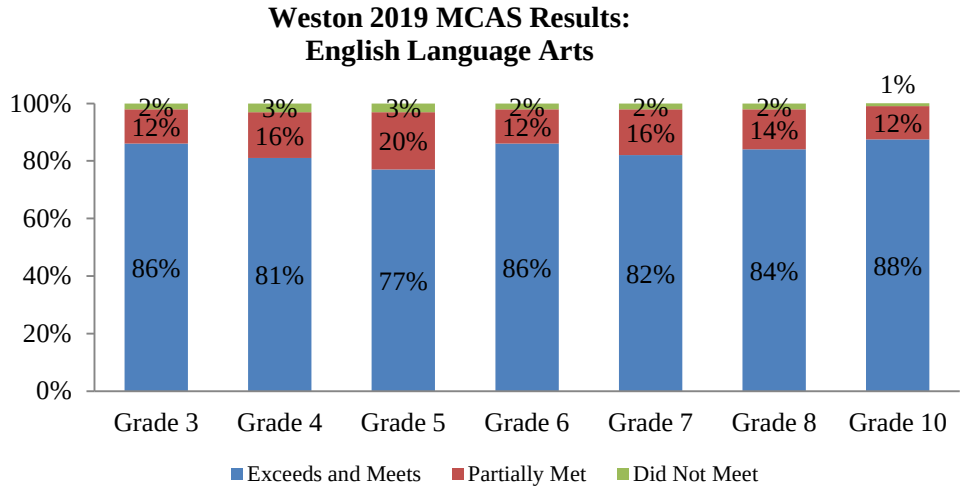
Debt Summary

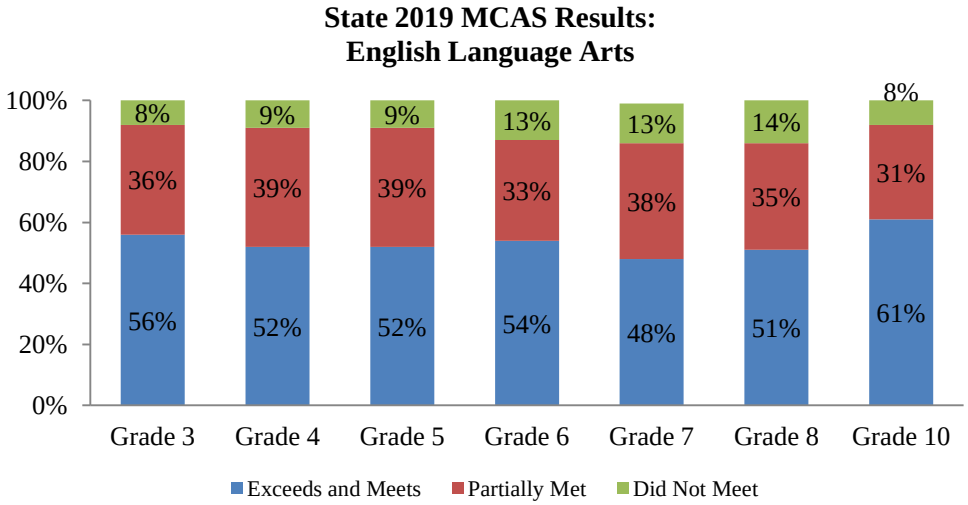
Weston is fortunate to have modern, well-maintained facilities that meet today's educational needs. Weston has completed a full renovation of its school buildings. The High School and Middle School were renovated in 1994. Renovation of Country and Woodland Schools was completed in 2004 and a new Field School opened in September 2014. The Case House will complete its renovation in early 2020.

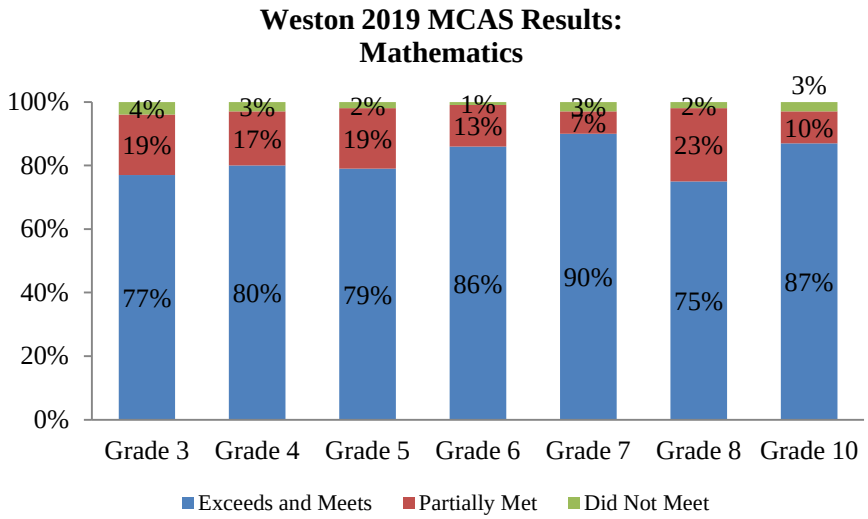


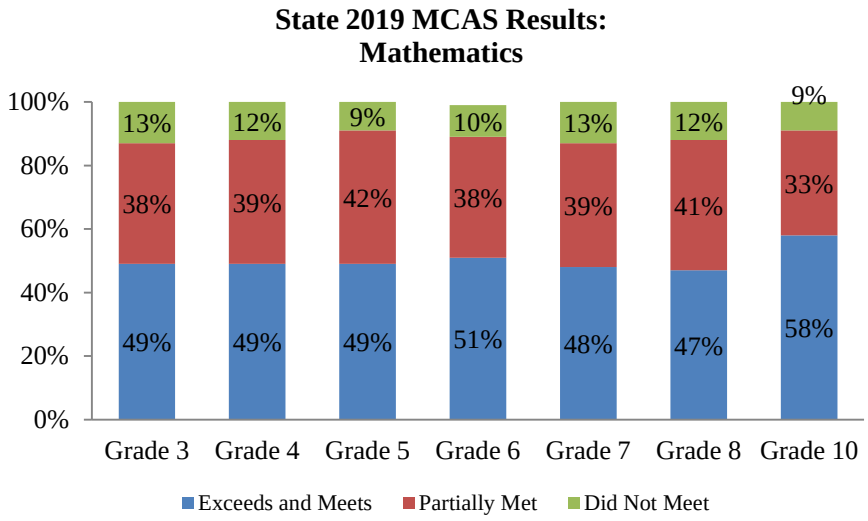
Student Achievement

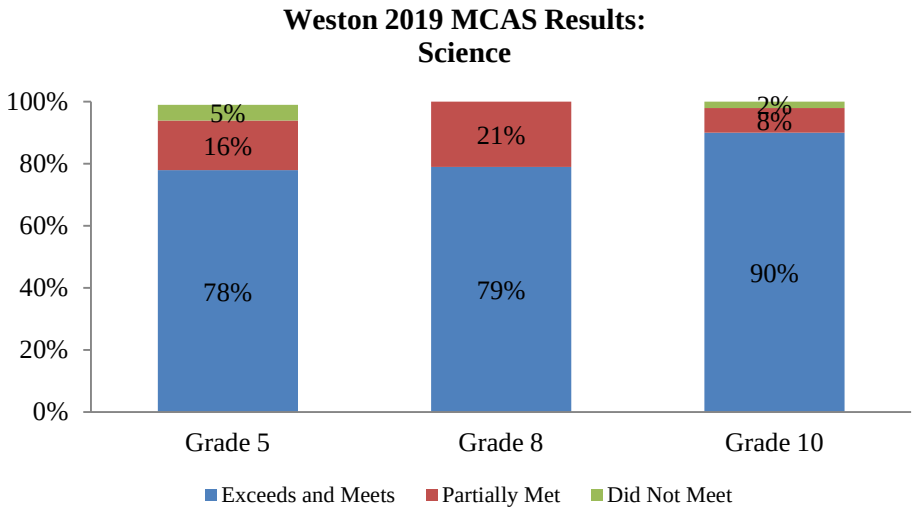
There are several student performance measures one could present. These include the Massachusetts Next Generation Comprehensive Assessment System (MCAS), Scholastic Aptitude Tests (SAT), American College Testing (ACT), Advanced Placement (AP) test and Weston based assessments. In all measures, Weston Public Schools continues to rank high within Massachusetts and nationally among public schools.

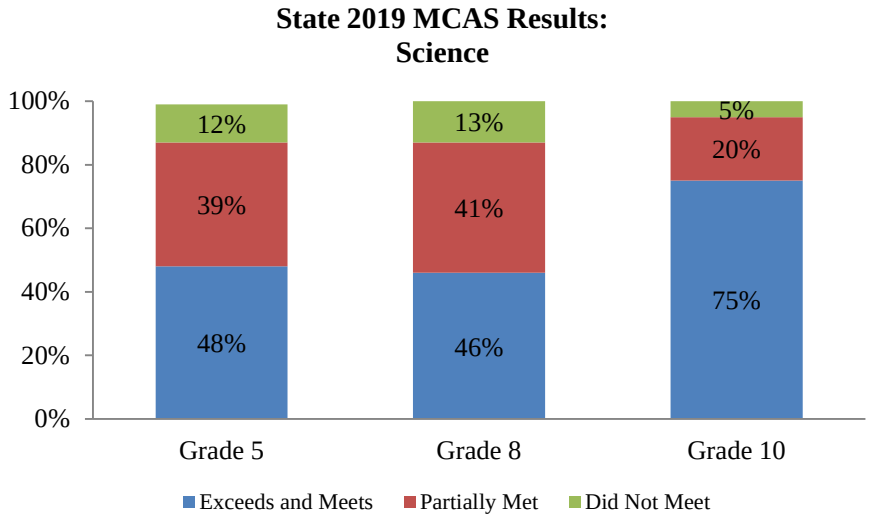





Weston 2019 MCAS Results:
Mathematics
100%
80%
60%
40%
20%
0%
4%
19%
77%
3%
17%
80%
2%
19%
79%
1%
13%
86%
3%
7%
90%
2%
23%
75%
3%
10%
87%
Grade 3
Grade 4
Grade 5
Grade 6
Grade 7
Grade 8
Grade 10
Exceeds and Meets
Partially Met
Did Not Meet


State 2019 MCAS Results:
Mathematics
100%
80%
60%
40%
20%
0%
13%
38%
49%
12%
39%
49%
9%
42%
49%
10%
38%
51%
13%
39%
48%
12%
41%
47%
9%
33%
58%
Grade 3
Grade 4
Grade 5
Grade 6
Grade 7
Grade 8
Grade 10
Exceeds and Meets
Partially Met
Did Not Meet





Weston offers a strong Advanced Placement (AP) curriculum to our students. In SY'18-19, 342 Weston High School students took AP exams for a total of 730 exams. That is over 20% more than FY'18's 608 exams. Weston offers 19 AP courses with students encouraged to take the AP exam or a final exam after the course. With a rating system of 5 (extremely qualified) to 1 (no recommendation), Weston students continue to excel in the exams with 85.00% of students scoring a 3 or higher. As a result of student performance, Weston was awarded the AP Honor Roll, in school year 2018-2019.

Most Weston High School graduates in the Class of 2019 continued their formal education at two or four-year colleges. Historically, between 94% and 99% of all graduates continue their formal education. In recent years, a small number of students have elected to take what is termed "gap year" before entering college.

Below is a history of placement choices of graduating seniors:

Class	Number of Graduates	Percent to 4-Year Colleges	Percent to Other	Percent Continuing Total
2019	195	98%	.5%	98.5%
2018	147	95%	1%	96%
2017	181	96%	2%	98%
2016	185	96%	3%	99%
2015	173	95%	4%	99%
2014	211	95%	4%	99%
2013	171	94%	1%	95%
2012	173	94%	3%	97%
2011	177	96%	1%	97%
2010	172	95%	1%	96%
2009	169	92%	2%	94%
2008	183	96%	2%	98%

The other 1.5% of the Class of 2019 has chosen to seek work/other/military or take a year as a "gap" year rather than continue their formal education. Based on the results of the Senior Exit Survey, students reported that 47.4% are attending their first-choice institution and 21.9% are attending their second choice.

As noted previously, Weston students routinely outperform peers in a variety of academic metrics including SAT, ACT, MCAS, and AP[12] test scores. Weston Public Schools offer a variety of academic supports for all students at all levels. Faculty has an eight-hour contractual day, longer than most Massachusetts preK-12 districts. This extended day provides ample time for cross team and departmental meetings; professional development; and individualized student assistance. Elementary schools provide Reading Recovery; an Auxiliary Reading Program (ARP); after-school academic support; and math support to students. Progress monitoring is used to identify strengths and areas of work. Middle school offers Topic companion courses to provide students with extra time in major subjects as needed. The Directed Support Program (DSP) offers in-school tutoring to Middle School students. The High School academic day provides students with ample time to fulfill the graduation requirements and take additional credits as desired. Each academic block in the eight-day rotation is 68 minutes in length allowing teachers to provide in depth instruction; homework assistance; and challenging laboratory work. The High School's Enrichment Center (TEC) provides in-school academic support to all students. In addition, Weston receives Title I federal grant funds to provide supplemental literacy and math support to qualifying schools. Since 2008, the district has provided academic summer support to METCO students to ensure success in the transition to Middle and High School. Weston Public Schools continues to focus on ensuring appropriate academic, social and emotional supports are in place for all students to be successful.

[12] Scholastic Aptitude Test (SAT), American College Test (ACT), Massachusetts Comprehensive Assessment System (MCAS), and Advanced Placement (AP).
[13] Weston High School classes begin at 8:45 AM and end at 3:15 PM
[14] The MA Department of Elementary and Secondary Education (DESE) issues detailed instructions regarding the completion of the End of Year (EOY) report. Even with these instructions, there are variations in the categorization of expenses district by district.

Per Pupil Expenditure

The Per Pupil Expenditure (PPE) is calculated for each district based on the submission of the data contained in the End of Year (EOY) report[14]. According to the Massachusetts Department of Elementary and Secondary Education, the "calculations show **all** school operating expenditures including those outside the general fund such as grants, private donations, and revolving accounts. They also include payments for local resident pupils who are being educated in schools outside the district. In addition to showing the overall cost per pupil, they provide detail about how much schools spend in specific functional areas such as administration, teaching, and maintenance." Below is a historical view of Weston's per pupil expenditures by major category.

Category	FY'13 PPE	FY'14 PPE	FY'15 PPE	FY'16 PPE	FY'17 PPE	FY'18 PPE	Inc.I(Dec.) from FY'17	Inc.I(Dec.) from FY'13
Administration	$ 687.76	$ 775.14	$ 799.45	$ 926.05	$ 807.85	$ 894.73	10.75%	30.09%
Instructional Leadership	$ 1,386.61	$ 1,596.05	$ 1,711.13	$ 1,768.06	$ 1,839.95	$ 1,856.93	0.92%	33.92%
Classroom and Specialist Teachers	$ 7,386.31	$ 7,913.47	$ 8,138.85	$ 8,175.95	$ 8,811.57	$ 8,969.52	1.79%	21.43%
Other Teaching Services	$ 1,403.18	$ 1,443.72	$ 1,757.22	$ 2,084.04	$ 1,750.91	$ 2,019.43	15.34%	43.92%
Professional Development	$ 202.41	$ 242.48	$ 243.12	$ 297.54	$ 337.21	$ 161.07	-52.23%	-20.42%
Instructional Materials, Equipment and Technology	$ 886.34	$ 574.84	$ 631.00	$ 811.24	$ 883.83	$ 915.46	3.58%	3.29%
Guidance, Counseling and Testing	$ 630.71	$ 686.70	$ 656.35	$ 684.49	$ 734.57	$ 704.79	-4.05%	11.75%
Pupil Services	$ 1,815.02	$ 1,875.41	$ 1,966.32	$ 1,899.27	$ 2,089.65	$ 2,165.12	3.61%	19.29%
Operations and Maintenance	$ 1,644.29	$ 1,721.27	$ 1,761.62	$ 1,797.84	$ 1,794.86	$ 2,062.40	14.91%	25.43%
Insurance, Retirement Programs and Others	$ 3,747.90	$ 3,996.88	$ 4,161.20	$ 4,425.74	$ 4,647.53	$ 4,757.25	2.36%	26.93%
Per Pupil Expenditure	**$20,579.00**	**$21,652.00**	**$22,768.00**	**$23,898.00**	**$24,458.00**	**$25,367.00**	**3.72%**	**23.27%**

Since fiscal year 2013, the per pupil expenditures has increased significantly. The largest contributor towards the total per pupil expenditure is 'Classroom and Specialist Teachers'. The FY'18 amount accounts for 35% of the total. At the initiation of the teacher's union, a joint labor management committee was formed in fiscal year 2008 to investigate switching from self-insured health plans to the state sponsored Group Insurance Commission (GIC). In July 2007, the state legislature allowed municipalities to join GIC as a cost reducing measure. Weston joined the GIC on July 1, 2009 as part of the third group of municipalities to do so. In 2014, the GIC agreement was re-negotiated for the 2016-2021 time period. This switch to the Group Insurance Commission has slowed the rate of growth in our health insurance costs for both employees and the Town of Weston. Although the number of students receiving special education services has remained consistent during the past four years (between 350 and 400 students with an Individual Education Plans), costs related to out-of-district placements and related services continue to fluctuate over the past six years. Costs related to outside service providers (psychological testing, hearing and vision services, etc.) are reported in the guidance, counseling and testing category in the end of year report.

Budget Approval Process and Contact Information

FY'21 Superintendent's Recommended Budget Presentation	January 13, 2020 at 7 PM at Middle School
School Committee Budget Sub-Committee Presentations	January 27, 2020 at 4 PM at Woodland School *Middle School* *High School* *Operations (Facilities, Utilities, Transportation)* *Technology* January 29, 2020 at 4 PM at Woodland School *Elementary Schools* *Special Education* *Central Office* *METCO* *Grants and Revolving Funds*
School Committee Meeting (Budget Hearing)	February 10, 2020 at 7 PM at Woodland School
School Committee Meeting (Budget Discussion)	February 25, 2020 at 7 PM at Woodland School
Finance Committee Meeting	TBD at 7:30 PM at Town Hall
School Committee Meeting (Vote)	March 9, 2020 at 7 PM at Woodland School
Town Meeting	May 11, 2020 at 7 PM at Weston High School Auditorium
Town Meeting (if necessary)	May 13, 2020 at 7 PM at Weston High School Auditorium

Copies of the budget document are available at the Weston Town Library and on the Weston Public School's web site (www.westonschools.org). For additional information or clarification, please feel free to contact us for assistance at:

Dr. Marguerite (Midge) Connolly,
Superintendent
Ph: 781-786-5100
E-mail: connollym@weston.org

Sheri-Lynne Matthews,
Asst. Superintendent for Finance and Operations
Ph: 781-786-5230
E-mail: matthewss@weston.org

Budget Document Format

Weston Public Schools budget aligns to the Association of School Business Officials (ASBO) Meritorious Budget Award (MBA) structure. The MBA program was designed to establish criteria to ensure the budget document " provides clarity and transparency on how funds are generated and allocation, and offers an opportunity to communicate future budget concerns and challenges.[15]" Information is conveyed through a mix of charts, graphs and text. There are four required sections: (1) Executive Summary; (2) Organizational; (3) Financial; and (4) Informational sections. Below is a description of each section.

The Executive Summary Section of the budget is designed to provide a stand-alone, 'liftable' section with key components of each major section of the budget document: organizational, financial and informational summarized.

The Organizational Section of the budget provides the reader an overview of the structure of Weston Public Schools as well as our vision and guiding principles. This section reviews Weston Public Schools governance, organizational structure, partnerships, vision statement, strategic plan, account structure and budget process.

The Financial Section of the budget is the most detailed section of the budget. Summary and detail revenue and expense information is provided for all fund types. This section is sub-divided into four levels. Level one is the summary information for the total budget. This includes all funding types combined. Level two is the summary information for the operating funds. Level three is the summary data for individual funds. The final section, Level Four, summarizes data by administrative unit. Additional information on debt obligations is also included.

The Informational Section of the budget provides the reader a broader context of the Town of Weston and Weston Public Schools. This section reviews Weston's taxation structure in relation to the property valuations; examine enrollment trends and forecasts; forecast future budgetary impacts to revenue and expenditures; compare financial data with neighboring communities and highlight student achievement data.

Compliance Statement

The Weston Public School District continues its policy of non-discrimination on the basis of race, color, national origin, sex, gender identity, disability, religion or sexual orientation, as applicable in its educational programs, activities, or employment policies as required by Title IX of the 1972 Educational Amendments, Title VI of the Civil Rights Act of 1964, Section 504 Regulations of the Rehabilitation Act of 1973, the Americans with Disabilities Act and all other applicable state, federal and local law and ordinances.

For information regarding Title IX compliance, contact Assistant Superintendent of Teaching and Learning, Weston Public Schools, 16 Alphabet Lane, Weston, MA 02493, (781) 786-5220. For information on section 504 compliance, contact the Director of Student Services, Weston Public Schools, 10 Alphabet Lane, Weston, MA 02493, (781) 786-5240. For information regarding the Americans with Disabilities Act, contact the Director of Human Resources, Weston Public Schools, 10 Alphabet Lane, Weston, MA 02493, (781) 786-5260.

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[15] Association of School Business Officials (ASBO) Meritorious Budget Award (MBA) checklist: http://asbointl.org/awards-career-development/meritorious-budget-award-pathway-to-the-mba