



**Acton-Boxborough Regional School District**  
**Superintendent's Office**  
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978-264-4700 www.abschools.org

**Glenn A. Brand**  
*Superintendent of Schools*

TO: Acton-Boxborough Regional School Committee Members

FROM: Glenn A. Brand

DATE: 12/16/14

RE: FY'16 ABRSD Budget Presentation #1 – Setting the Stage/ Historical Background

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As we begin the presentation and discussion of the proposed FY'16 ABRSD Budget, I would like to provide you with the following documents as a starting point:

1. Superintendent's Budget Message – Glenn Brand
2. ABRSD Organizational Chart – Marie Altieri
3. ABRSD Long Range Strategic Plan – Glenn Brand
4. FY'16 Budget Timeline – Clare Jeannotte
5. Budget History – Clare Jeannotte
6. Student Enrollment – Marie Altieri
  - a. FY'15 Enrollment as of 10/1/14
  - b. Ashton Enrollment Projections, School Committee Presentation on 11/6/14
7. FY'16 Budget Assumptions / Key Decisions – Glenn Brand
8. Presentation Slides, School Committee meeting on 12/18/14

I look forward to this first presentation at the ABRSC meeting on 12/18/14, and to the next, more detailed presentation at your meeting on 1/8/15.

*Our Mission is to prepare all students to attain their full potential as life-long learners, critical thinkers, and productive citizens of our diverse community and global society.*

**Office of the Superintendent**  
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TO: Acton-Boxborough Regional School Committee Members  
FROM: Glenn A. Brand, Superintendent of Schools  
DATE: 12/16/14  
RE: FY16 Preliminary Budget

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The Administration is currently engaged in the development of the FY16 (2015-16) operating budget for the Acton-Boxborough Regional School District. This proposed plan will be presented at your January 8<sup>th</sup> School Committee meeting and will detail the total request alongside the percentage increase over the current budget year.

The delivery of an operating budget for a school district centers on a larger 'story.' Some of this story must put into perspective our historical past alongside an understanding of the resources necessary to support our district's mission of *preparing all students to attain their full potential as life-long learners, critical thinkers, and productive citizens of our diverse community and global society.*

Consideration of this historical data represents a critically important element of budgetary development. However, given the combined effort of transitioning from three (3) separate school districts into one (1) the ability to make true line-by-line comparisons is simply not possible in all areas. Within the pages that follow efforts have been made to establish as clearly as possible a budgetary history that puts into context the fiscal reality of the last few years.

This information also seeks to provide a basis upon which we begin to build our budget planning for the next school year. Before we begin to focus on any significant increases that are designed to provide program improvement or enhancement, the budgetary drivers that create the foundation upon which this budget is built must be considered. Such things as insurance costs, Middlesex Retirement, OPEB and the like represent significant commitments that the administration must contend with as we seek to establish our budget. In many respects as significant as maintaining our current human resources, they contribute largely to the foundation of the budget that we must look to establish and support and attention to these fiscal realities must be observed.

Finally, a review of the budgetary documentation presented last year identifies three (3) priorities which then served as the underlying focus for what is our current FY15 budget. These priorities included:

- i) Developing a unified Pre-K to 12 budget*
- ii) Meet the growing state and federal requirements for school leadership*
- iii) Meet the needs of increasing numbers of our at-risk students*

In many respects, these priorities continue for our organization as a district. While we continue to benefit from the cost savings resulting from regionalization, it is clear to me as your Superintendent that there continues to be a strong emphasis on ensuring that we have the resources necessary to meet the wide range of needs for a growing segment of our student population. From Special Education to English-Language Learning, the FY16 budget request will identify additional resources that are felt to be essential in shoring up and expanding the district's capacity to address these needs.

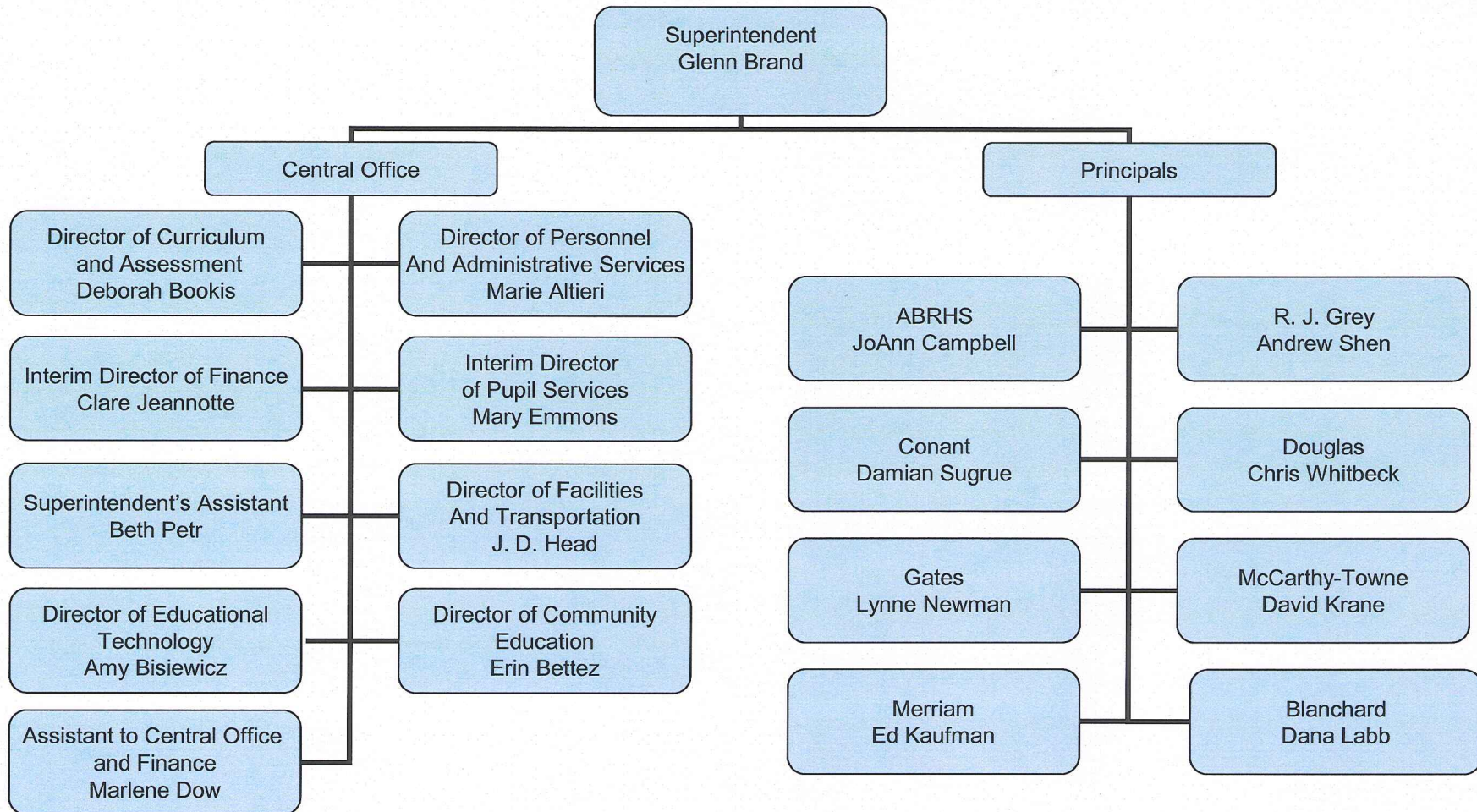
The following dates will serve as additional opportunities for you to consider the FY16 budgetary request:

January 8, 2015 - Superintendent's FY16 Preliminary Budget Presentation  
January 22, 2015 - Superintendent's FY16 Budget Discussion  
January 31, 2015 - Budget Saturday  
February 5, 2015 - Public Hearing on the Superintendent's FY16 Budget  
February 26, 2015 - Initial ABRSD budget assessments VOTE

As has been the case throughout the last number of years, FY16 is shaping up to be another challenging year from a fiscal standpoint. Extensive dialogue will be required about the proposals and requests as we position our district in the best possible way to advance our programs and opportunities for students while meeting the increasing demands associated with providing these services. As your Superintendent I look forward to participating in these discussions and decisions with you and my leadership team.

# FY '15 Organizational Chart

## Central Office/Principals



December, 2014

**Long Range Strategic Plan 2011-2016**  
**Adopted December 1, 2011**  
**Updated Spring 2014**

*Acton-Boxborough Regional School District*

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## **Long Range Strategic Plan 2011-2016**

### *Purpose*

This plan was spearheaded by a committee of stakeholders (educators, parents, citizens of Acton and Boxborough, and school committee members) between the fall of 2010 and the fall of 2011. Significant effort was made to collect input and feedback from the larger school community. In spring 2014, the committee met again to report on progress to date and update and refine goals for the last two years of the plan in anticipation of expanding the region to include pre-K through sixth grades from Acton and Boxborough. To reflect the district's current need for capital improvement, the committee inserted Goal 5 ahead of the last goal.

The ultimate plan lays out the district's mission and values, as defined by our larger community, as well as a series of goals intended to help the district meet those ideals. Over the next two years, the district will strive to meet these goals in order to fully prepare our students to be lifelong learners, critical thinkers, and productive citizens.

### *Mission*

To prepare all students to attain their full potential as lifelong learners, critical thinkers, and productive citizens of our diverse community and global society.

### *Values*

As a community, we value:

1. An environment that promotes social development and emotional and physical well-being for the entire school community.
2. An excellent academic program that prepares all students to achieve their individual potential.
3. Diverse extracurricular opportunities accessible to all students that provide for student growth.
4. A community that welcomes and respects the differences among us.
5. Literacy, communication and technology skills for lifelong learning.
6. Educational policy and resource decisions informed by research and evidence.

## Long Range Strategic Plan 2011-2016

### **Goal 1**

Meet the diverse needs of all students by promoting social emotional learning and physical well-being through increased student-adult and student-student interactions.

*Values addressed: 1, 2, 3, 4, 5, 6*

#### *Strategies:*

- Provide students with increased counseling services.
- Create an advisory program at the secondary level that provides every student with a one-to-one relationship with an adult.
- Fully implement social and emotional curricula at the elementary schools.
- Partner with community organizations to expand extracurricular and intramural offerings for all students.
- Increase communication about community offerings for youth by expanding school and district websites.
- Examine and determine appropriate staffing and funding to provide diverse opportunities for all students.
- Provide increased opportunities for safe and fun activities for adolescent students during off-school hours.
- Maximize use of facilities and grounds to provide additional space for activities.
- Broaden and improve supervision of elementary students during unstructured time (e.g. bus, recess).

#### *Measurable Outcomes:*

##### Year 1 2011-2012

- Used existing Senior Survey to document baseline satisfaction with school climate.
- Advocated, through the budgeting process, for additional counseling personnel at the secondary level.
  - Added one 1.0 school counselor at ABRHS.
- Developed plan and conducted staff training for implementation of Advisory program at the high school in fall 2012.
- Conducted feasibility study of Lower Fields for expansion of space, including cost.
- Implemented anti-bullying/harassment curriculum at RJ Grey Junior High School.
  - Included presentations on cyberbullying and social media by Massachusetts Aggression and Reduction Center, performances by Boston Improv, lessons on social media issues embedded in 8th grade Computer Literacy course.
- Implemented JH Ambassadors program.
  - Recruited current junior high students to support the transition of new students to RJ Grey.



## Long Range Strategic Plan 2011-2016

- Provided annual Project Wellness event at Merrimack College for 7th grade families.
  - Included 36+ workshops on issues of physical, social, and emotional wellness, adjusted every year to include relevant topics and issues.
- Transitioned from DARE to expanded role of school resource officers in curriculum implementation.
  - Introduced ISAFE at the elementary level and expanded drug safety program.

### Year 2 2012-2013

- Implemented Advisory program at the high school.
  - Implemented Advisory program at ABRHS bringing advisors and students together for 10 minutes per 6-day cycle. Modified bell schedule to include Advisory.
- Piloted silent reading period for 20 minutes per day at RJ Grey Junior High School.
- Partnered with the community to offer additional extracurricular opportunities for students during after school and unstructured time.
  - Listed community service and service learning opportunities for students on the ABRHS Community Service website.
  - Established a Book Club at RJ Grey Junior High School to include students and adults.
  - Staffed RJ Grey Library for extended hours - until 5 PM every day - providing space for students to work and interact with peers.
  - Expanded upon RJ Grey extracurricular clubs and organizations to address varying student interests including for example: Ping Pong Club, Literary Magazine, Climate Club, Yo Yo Club, ASHA, Take Action, Girl Up.
- Created and implemented a school-wide protocol for re-entry of students diagnosed with concussions.
  - Used Research and Development grants (R&D) to support student re-entry focusing on case manager model to coordinate services and accommodations.

### Year 3 2013-2014

- Adjusted Advisory schedule to increase and regulate meeting time - 15 minutes per week.
- Implemented school-wide silent reading period for 20 minutes per day at RJ Grey Junior High School.
- Continued to use existing Senior Survey to document satisfaction with school climate after introduction of initiatives.
- Inventoried and published on website community-based opportunities for students.
  - Updated ABRHS Community Service website regularly.
- Determined baseline numbers of student participation in community-based and school-based extracurricular activities.

## Long Range Strategic Plan 2011-2016

- Collected data identifying student participation in extracurricular and community service activities.
- Identified, through building-based approaches, areas of concern in unstructured time at the elementary level.
- Collected data regarding effectiveness of increased after-school activities for students.
- Reallocated resources to meet school-determined needs regarding unstructured time.
  - Secured funding (i.e., grants) for natural learning spaces based on the prior year's design and plan.
  - Adapted facilities and equipment for use by students with disabilities and provide opportunities for this underserved population to participate in activities with peers.
- Determined creative approaches for counseling department to support needs of students.
  - Assessed the effectiveness of the new Student Support Team (SST) model at ABRHS and modify where necessary.
  - Added Signs of Suicide (SOS) program to Physical Education classes at ABRHS.
  - Added .6 additional therapeutic staff at Merriam and McCarthy-Towne.
  - Strengthened the relationship between elementary and secondary counseling staff.
  - Formulated a plan to address areas of concern at both the elementary and secondary levels.
    - Considered fiscal and programmatic services for medical and mental health cases.
    - Addressed counseling staff to student caseload ratios.
    - Used community and school practitioners to help plan and offer parent education workshops, presentations, etc.
    - Created resources to provide services for students who are unable to attend school for physical and mental health reasons.

## Year 4 2014-2015

- Create a matrix of the social/emotional curricula at the elementary schools detailing progress towards full implementation, as defined by each school.
  - Continue enhancing social-emotional curricula for Pre-K through grade 12 with implementation to be defined by each school and its constituents.
  - Identify, through building-based approaches, gaps in curricula. Research and purchase resources and train staff.
- Reallocate resources to meet school-determined needs regarding unstructured time.
  - Continue to adapt facilities and equipment for use by students with disabilities and provide opportunities for this underserved population to participate in activities with peers.
- Determine creative approaches for counseling department to support needs of students.

## Long Range Strategic Plan 2011-2016

- Continue to assess the effectiveness of the new Student Support Team (SST) model at ABRHS and modify where necessary.
- Use INTERFACE and evaluate if it provides support to counselors in terms of service delivery and therapeutic referrals.
- Add .5 school psychologist at ABRHS.
- Organize R&Ds around designing and implementing mental health curriculum K-12.

### Year 5 2015-2016

- Re-allocate resources to meet school-determined needs regarding unstructured time.
  - Begin constructing natural learning spaces based on accepted design and plan.
  - Continue to adapt facilities and equipment for use by students with disabilities and provide opportunities for this underserved population to participate in activities with peers.

#### *Connection of Goal to Value:*

At the core of students' emotional health are the constructive relationships they form with adults and with each other, as well as the educational experiences provided and shared. As a school district, it is our responsibility to provide the time and resources to ensure that each student has the opportunity to develop social emotional resiliency through those relationships, provided with a variety of activities to encourage their overall academic, social, and emotional development.

## Long Range Strategic Plan 2011-2016

### Goal 2

Prepare students by providing them with the knowledge, and intellectual and reflective skills they will need to thrive in an increasingly complex world.

Values Addressed: 1, 2, 4, 5, 6

#### *Strategies:*

- Review and articulate what all students should know and be able to do at each grade level.
- Determine classroom-based authentic assessments of student learning.
- Create opportunities for students to monitor their own progress.
- Expand learning approaches by creatively leveraging resources from students' families and local communities.
- Promote the development of a deep and multifaceted understanding of global issues.

#### *Measurable Outcomes:*

##### Year 1 2011-2012

- Communicated to the school community the learning goals specific to disciplines, courses, and grades.
  - Completed the learning goals for all disciplines (except electives); all learning goals are now posted on the district website.
  - Worked with the new English Language Arts (ELA) and Literacy Framework to refine writing rubrics and adjust instruction and assessment to meet the new standards.
  - Created Teaching and Learning site for staff.
  - Carried out Professional Day 2011 activities.
- Developed and/or identified tools to assess students' progress towards learning goals.
  - Chose K-6 ELA Reading Assessment Tools at school level.
  - Continued implementation of K-2 mathematics assessments.
  - Discussed Common Assessments 7-12 based on learning goals.
- Reviewed present internship program and made recommendations for continued growth of the program to enrich students' learning experience outside the classrooms.

##### Year 2 2012-2013

- Continued developing and/or identifying tools and began implementing assessments to inform educators about the progress of individual students.
  - Examined and modified criteria of learning goals for vertical alignment of APS K-6 ELA and Literacy Task Force.
  - Used feedback from Principals, Directors and department leaders to determine next steps towards supporting educators' use of learning goals and common assessments.
  - Identified Literacy assessments used in APS according to learning goals.
- Explored possibilities for students to monitor their own progress.
  - Focused 2011 Summer Leadership Institute on formative assessment.
  - Hired consultant to work with high school staff on District-Determined Measures.
- Expanded internship opportunities for high school students.

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## Long Range Strategic Plan 2011-2016

- Broadened international exchange activities accessible to all students from in-classroom, internet-based activities to international field trips.

### Year 3 2013-2014

- Continued developing and/or identifying tools and began implementing assessments to inform educators about the progress of individual students.
- Articulated District-Determined Measures (DDMs) or common assessments for all educators and administrators.
- Reviewed current family and community involvement and have begun activities/resources that continue to build and sustain a comprehensive program of partnerships.
  - Created parent resource websites for literacy, mathematics, and science.
  - Identified school-based-community service projects.
  - Developed outdoor play spaces planning grant with Town of Acton Recreation Department and Community Preservation Committee.
  - Participated in early childhood discussions with Discovery Museum- Getting Ready to Learn.

### Year 4 2014-2015

- Affirm value of authentic audiences who provide multiple or alternate perspectives to specific disciplines. To that end we will begin to explore effective authentic audiences within the school community as well as audiences external to the school community to provide critical feedback to students and staff.
  - Document where and how feedback is already being sought.
  - Create a document for the Teaching and Learning site to be shared with all staff - include what is happening in district, importance of critical feedback, potential sources and facilitation of feedback within school community and external audiences.
- Explore what effective family and community engagement looks like in different grades and roles.
  - Document current family and community engagement throughout the district. Share this information with administration and staff.
  - Explore the National Network of Partnership Schools' *6 Types of Family and Community Engagement* to identify district's strengths and weaknesses, especially with regard to students' emotional/social intelligence and needs.
  - Form a committee to "put some language to" standard three of the Educator Evaluation Process. Share with staff for feedback and refinement.
- Identify potential curriculum areas to promote a better understanding of ourselves and others and opportunities for students to address and lead topics related to global issues.

### Year 5 2015-2016

- Implement activities that engage families in nurturing emotional/social intelligence and needs of students.
- Refine or augment the curriculum to promote better understanding of ourselves and others.

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## Long Range Strategic Plan 2011-2016

- Create and/or further opportunities for students to address and lead topics related to global issues.

### *Connection of Goal to Values:*

By achieving this goal, we will provide students with a learning environment that promotes emotional, social and intellectual development. With well-articulated learning goals and authentic assessment of progress, we can realize our value of promoting academic excellence that allows all students to achieve their individual potentials. Refining curriculum to promote better understanding of ourselves and others will further strengthen, recognize and honor the differences among us. Partnership with local community and participation in international exchange programs afford our students first-hand knowledge and experience of today's workplace and global society.

## Long Range Strategic Plan 2011-2016

### Goal 3

Hire and retain high-quality educators and provide supervision, evaluation, and a systemic, focused plan for professional growth that improves student experiences.

*Values Addressed:* 1, 2, 5, 6

#### *Strategies:*

- Attract and retain the staff most capable of meeting the needs of our learners.
- Adopt and implement a new educator evaluation system, which provides all educators with valuable feedback to improve practice.
- Create structures for faculty to work together to understand student learning and growth in light of teacher practice.
- Revise professional development program to align with other district goals.

#### *Measurable Outcomes:*

##### Year 1 2011-2012

- Ensured that 100% of our educators are determined to be highly qualified by the Massachusetts Department of Elementary and Secondary Education.
- Developed rubrics, timelines, and process for teacher and administrator evaluations consistent with Massachusetts Standards for Educator Evaluation.
  - Surveyed faculty to provide data about the new teacher evaluation pilot, which guided adjustments and modifications during initial implementation.
  - Implemented new evaluation system in all schools and departments, including contract language for the evaluation system that included rubrics, timelines, and process that is consistent with Massachusetts Standards for Educator Evaluation.
- Surveyed staff about the efficacy of principals and administrators. Continue to evaluate administrators annually.
  - Implemented annual survey about school and district leadership, with annual evaluations of administrators.

##### Year 2 2012-2013

- Maintained 95% or better teacher retention rate (excluding retirements).
- Piloted new evaluation system in all schools and departments, and initiated training for district administrators for conducting effective observations and providing effective feedback.
- Developed several new professional development offerings in areas such as educational technology, literacy, and emotional health and wellness in an effort to be aligned with, and support, other district goals.

## Long Range Strategic Plan 2011-2016

### Year 3 2013-2014

- Continued training for district administrators for conducting effective observations and providing effective feedback.
- Began development of tools to measure student growth over time, including District Determined Measures, that will be fully implemented in 2014-2015.
- Ensured that 50% of licensed staff members were each observed by supervisors at least seven times.
- Implemented a new second year of mentoring for new teachers focusing on Critical Friends Groups, in an effort to provide greater emphasis on collaborative educator groups.
- Advocated for full-time assistant principals at each elementary school to provide stronger means of educator evaluation, supervision, and support.

### Years 4-5 2014-2015 & 2015-2016

- Develop school-based and district-wide teams to calibrate educator ratings for consistency.
- Incorporate multiple measures of student growth over time, including District Determined Measures, into teachers' evaluations.
- Schedule time for supervisors to see all professional staff in classrooms throughout the year and consistent with each educator's evaluation plan.
- Continue to develop and offer several new professional development offerings in areas such as educational technology, literacy, and emotional health and wellness in an effort to be aligned with, and support, other district goals.
- Develop individual professional development plans and goals based on system goals and self-reflection for each teacher and administrator.
- Continue to develop programs and strategies to ensure that every educator belongs to a collaborative group that meets regularly to review student work and discuss instructional practices.
- Survey faculty to provide data about teacher satisfaction, workload, and the efficacy of the new evaluation system and the professional development program.
- Gather data showing student growth across grade levels and disciplines from District Determined Measures.
- Incorporate student feedback into teachers' evaluations.
- Incorporate full-time elementary assistant principals into school cultures, including working with students, families, and staff.
- Identify reasons for teacher turnover and other trends by reviewing five-year list of teacher retention rates.



## Long Range Strategic Plan 2011-2016

- Discuss and develop meaningful strategies and goals for increasing the diversity of our staff and faculty, recognizing the importance and benefits of having a staff that reflects not only the diversity of the student population but the diversity of the larger world in which they will live and work.

### *Connection of Goal to Value:*

Hiring and retaining high quality educators will contribute to an environment that promotes social, emotional, and physical well-being, an excellent academic program, literacy and critical thinking skills and researched based decision making about the allocation of resources. A valuable teacher evaluation system and professional development opportunities that provide growth for educators lead to high quality instruction.

## Long Range Strategic Plan 2011-2016

### **Goal 4**

Create a teaching and learning environment in which all students use information, technology, and communication tools in sophisticated ways to enhance learning.

*Values Addressed:* 1, 2, 5, 6

#### *Strategies:*

- Develop a plan that would allow each student access to technology when educationally appropriate.
- Investigate and address issues that may constrain the participation of students who are economically disadvantaged, students with special needs, English language learners, etc.
- Integrate technology learning goals with academic goals across the curriculum.
- Identify staffing levels to provide appropriate technical and instructional support for students and teachers.
- Provide training for teachers to incorporate online interaction into their curricula.

#### *Measurable Outcomes:*

##### Year 1 2011-2012

- Migrated all staff from First Class email to *ABschools* (powered by Google Apps for Education).
- Issued high school students *ABschools* accounts to provide email and other communication/collaboration tools for learning.
- Completed network assessment to identify elements that are in need of an upgrade or replacement to fulfill service and growth needs.
- Created student-led Technology Help Desk to provide more support for teachers and students using technology and equip students with life skills in technical support, troubleshooting, and listening to others.
- Implemented ongoing technology-related professional learning opportunities that build capacity for technical skills and provides teachers with opportunities to practice, share ideas, and discuss technology in meaningful ways.
- Equipped all 1st-3rd grade classrooms with SmartBoard technology and K-6 with document cameras.
- Distributed new MacBooks through leasing program to elementary teachers.

##### Year 2 2012-2013

- Introduced *ABschools* accounts to junior high students.
- Implemented Storage Area Network (SAN) and cloud data storage to begin consolidation of aging hardware platforms, meet storage demands of our end-users, and reduce hardware and operating costs.
- Implemented new help desk ticketing system district-wide to track and manage support

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## Long Range Strategic Plan 2011-2016

metrics, resolve performance issues of the current proprietary system, and provide exceptional technical support to all staff.

- Explored equitable and consistent technologies in the classroom that support K-12 technology learning goals.
  - Evolved into Innovative Learning Program (ILP).
- Hired K-12 Instructional Technology teacher to support EDTech Academics instructional team and enhance our support model.
- Identified issues with students, teachers, and administration that may need to be addressed through policy measures (update Employee Technology Policy to include social media).
- Redesigned district website to include more resources for staff and families, enhance navigation, and increase communication to all learning community members.
- Continued technology-based professional learning program for teachers aligned with common learning goals for students such as Teacher-to-Teacher Boot Camps.

### Year 3 2013-2014

- Introduced ABSchools accounts for students in grades 4-6 to provide access to collaborative tools.
- Established EDTech Media Services for district-wide support.
- Upgraded wireless infrastructure (Phase I) at all schools to meet projected demands.
  - Upgraded backbone infrastructure to support 10GB connections between our schools and purchased new 1GB Cisco switches to increase wireless speeds and support our new security camera initiative.
- Explored procedures that ensure equitable access to technology to all students.
  - Provided hardware to low-income families through a legal distribution of our surplus technology equipment under the premise of state/town “fixed assets” guidelines.
  - Assisted families in gaining low-cost access to the Internet through Comcast’s Internet Essentials program.
- Piloted more cost-effective devices to meet increased access to student technology needs - ChromeBooks, iPads, Kindles, Android tablets.
- Updated K-12 educational technology learning goals to support the Massachusetts Technology Literacy and Information Fluency Standards and Benchmarks and communicate to the school community.
- Implemented an Innovative Learning Program (ILP) to support teachers and their students in meeting specific learning goals with technology.
- Continued technology-based professional learning program for teachers aligned with common learning goals for students.
  - Continued Teacher-to-Teacher Boot Camps.

## Long Range Strategic Plan 2011-2016

- Supported teacher presentations at conferences (MassCUE, Google Summit, EDCO).

### Year 4 2014-2015

- Merge technical services with Blanchard Memorial School to support a successful regionalization plan and take advantage of cost-saving efficiencies.
- Upgrade wireless infrastructure (Phase II) at all schools to meet projected demands
  - Install next generation wireless access points.
- Execute server virtualization to further reduce operation and hardware costs and improve disaster recovery.
  - Use cloud resources when possible (Google Drive).
- Ensure a sustainable professional development plan for teachers that can meet K-12 technology learning goals through funding commitments.
- Support Partnership for Assessment of Readiness for College and Careers (PARCC) assessments.
- Increase student-produced educational programming.
- Provide family “Tech Nights.”

### Year 5 2015-2016

- Upgrade wireless infrastructure (Phase III) at all schools to meet projected demands.
  - Create an open wireless account for students, guests, and residents to use while on campus.
- Explore plans that allow all students access to technology when needed.

### *Connection of Goal to Value:*

In order to fully achieve their potential in the 21st century, all students must have multiple opportunities to develop technological skills.

## Long Range Strategic Plan 2011-2016

### **Goal 5**

Ensure that the Acton-Boxborough Regional School District supports the whole child and 21st century teaching and learning by offering safe, inspiring, accessible, diverse, and sustainable environments while maintaining the value of taxpayer investment.

*Values Addressed:* 1,2,3,4,5,6

#### *Strategies:*

- Document conditions of buildings and grounds.
- Develop a space utilization plan recognizing opportunities that may evolve from regionalization and declining enrollment.
- Continue to support our commitment to sustainability at the district level.
- To the extent possible incorporate strategies of other parts of the Long Range Plan in building projects.
- Develop, fund, and implement a Long Term Capital Plan.
- Collaborate with relevant Acton and Boxborough leadership boards, committees, and employees to develop funding strategy to meet Long Term Capital Plan goals.
- Continue to improve Americans with Disabilities Act (ADA) access at all facilities.

#### *Measurable Outcomes:*

##### Summary of Year 1-3 2011-2014

- Achieved the “Energy Star” certification for five school buildings.
- Reduced district carbon footprint by 19% from benchmark year of 2009.
- Reduced district fossil fuel dependence by 35% since benchmark year of 2009.
- Completed many capital projects ranging from \$20,000 to \$3,000,000 over three year time period; approximate total of \$4,667,000 with funding sources ranging from district operating budget, grants, and strategic partnerships.

##### Year 1 2011-2012

- Received International Green Flag award at high school- recognition of commitment to sustainability.
- Designed and constructed \$3,000,000 Lower Fields multi-use athletic complex.
- Funded the Energy Manager position through utility savings.

##### Year 2 2012-2013

- Achieved Federal Green Ribbon award for the district - recognition of commitment to sustainability, wellness, and integration of such into curriculum at an organizational level.
- Completed safety and security improvements at all schools.

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## Long Range Strategic Plan 2011-2016

- Reallocated an existing full-time equivalent to create district-wide Security Manager position.

### Year 3 2013-2014

- Created district capital spending line item \$155,000 FY15 budget.
- Completed Richard Dow track replacement project.
- Presented draft district-wide capital plan as part of FY15 budget process with Blanchard School included.
- Received Energy Champion National Rookie of the Year Award at Gates, Douglas, and Conant Elementary Schools.
- Received Energy Champion Massachusetts School of the Year Award at ABRHS.

### Year 4 2014-2015

- Launch District Capital and Space Planning Committee.
- Document the current conditions of buildings and grounds.
- Develop a space utilization plan recognizing opportunities that may evolve from regionalization and declining enrollment.
- Invest in professional consulting support to assist in capital plan development and space utilization, planning, and design.
- Develop and adopt a district policy that supports our commitment to sustainability and social consciousness at an organizational level.
- Examine how funds might be better allocated to increase opportunities to support fulfilling capital needs within operating budgets, warrant articles, borrowing opportunities, etc.
- Begin to implement Charter Road Campus Master Planning document and examine other satellite campuses for traffic flow, pedestrian safety, and walkability.
- Design natural outdoor learning environments at all elementary schools, and examine funding mechanism for future development.

### Year 5 2015-2016

- Earn “Energy Star” certificate in every eligible district building.
- Continue capital plan development.
- Continue space planning and design initiatives.
- Collaborate with relevant Acton and Boxborough leadership boards, committees, and employees to develop funding strategy to meet Long Term Capital Plan goals.
- Develop a plan to improve district ADA access all buildings and grounds.
- Determine operational staffing required to meet Long Term Capital Plan goals.
- Begin constructing natural learning spaces based on the architect’s design and plan.

## Long Range Strategic Plan 2011-2016

### *Connection of Goal to Value:*

The 21st century learning environment knows no boundaries as it encompasses buildings, grounds, facilities, fields, and virtual space. Accessible, safe, diverse, sustainable, and inspiring environments are conducive to teaching and learning for the school and broader communities.

## Long Range Strategic Plan 2011-2016

### Goal 6

Develop and implement strategic budgets, aiming for continuous improvement over time in order to achieve all of the district's long-range strategic goals.

*Value Addressed: 6*

#### *Strategies*

- Examine the costs and benefits associated with regionalization.
- Determine staffing required to address long-range goals.
- Collaborate with towns' leadership to develop funding strategy to meet goals.
- Examine how funds might be better re-allocated to increase services for students.
- In accordance with Goal 1, state specifically personnel needs and determine cost implications in each fiscal budget.
- In accordance with Goal 2, determine curriculum, instruction and assessment goals and cost implications in each fiscal budget.
- In accordance with Goal 3, determine evaluation, supervision, and professional development goals for all employees and associated costs with this goal in each fiscal budget.
- In accordance with Goal 4, detail costs associated with providing a technology enhanced teaching and learning environment in each fiscal budget.
- In accordance with Goal 5, determine funds available to document current conditions of buildings and grounds and develop a capital plan.

#### *Measurable Outcomes*

##### Year 1 2011-2012

- Scrutinized non-classroom expenses in order to direct resources toward the classroom, consistent with Goals 1 through 4.
- Worked collaboratively with town leadership and employees to develop and implement health insurance savings.
- Transferred funds from energy and health insurance to salaries to add staff consistent with Goal 1. Implemented and refined use of vacancy factor for staffing to ensure adequacy of funds.
- Dedicated \$1 million infrastructure (technology and textbooks) to support Goal 4.
- Managed budgets to return \$1.3 million to reserves for use in supporting educational priorities in future years.
- Added 2.0 Assistant Principals (shared among four elementary schools) and one Elementary Mathematics Curriculum Specialist as part of investment budget.

##### Year 2 2012-2013

- Scrutinized non-classroom expenses in order to direct resources toward the classroom, consistent with Goals 1 through 4.
- Transferred funds from energy and health insurance (\$130,000 at AB) to salaries to add staff consistent with Goal 1.



## Long Range Strategic Plan 2011-2016

- Implemented and refined use of vacancy factor for staffing to ensure adequacy of funds (\$225,000).
- Collaborated with town leadership in both towns to develop funding strategy to meet goals.
- Calculated investment growth number, and added to \$581,000 to budgets for fiscal year 2013.
  - Provided funding at elementary schools for full-time art, music, and physical education instructors and second year installment for elementary classroom assistant funding, as well as two English teachers and one counselor at ABRHS, Lower Fields funding and a budget analyst.
- Addressed long-term financial health of the district through management of Excess & Deficiency account and through establishment and continued contribution to Other Post-Employment Benefits (OPEB) trust (contributed \$236,000 to ABRSD OPEB trust).
- Appointed regionalization study committee, which examined costs and benefits associated with full preK-12 regionalization. Provided information to town meetings in both towns to implement regionalization.
  
- Year 3 2013-2014
- Scrutinized non-classroom expenses in order to direct resources toward the classroom, consistent with Goals 1 through 4.
- Transferred funds from energy and health insurance to salaries to add staff consistent with Goal 1. Implemented and refined use of vacancy factor for staffing to ensure adequacy of funds (\$200,000).
- Collaborated with town leadership in both towns to develop funding strategy to meet goals.
- Calculated investment growth number and added to budgets for fiscal year 2014 (\$563,000).
  - Provided funding for part-time Assistant Principal for Douglas, English Language Education support, counseling, two ABRHS English teachers, Bridges program, and professional learning.
- Addressed long-term financial health of the district through management of Excess & Deficiency account and through contribution to OPEB trust (contributed \$376,000 to ABRSD OPEB trust).
- Prepared for first year of regionalization, including planning the first regional budget for FY15.
- Refinanced outstanding long-term debt and received AAA bond rating to achieve savings for taxpayers in both towns.

### Year 4 2014-2015

- Scrutinize non-classroom expenses in order to direct resources toward the classroom, consistent with Goals 1 through 5.
- Transfer funds from health insurance to salaries to add staff consistent with Goal 1. Implemented and refined use of vacancy factor for staffing to ensure adequacy of funds (\$425,000).

## Long Range Strategic Plan 2011-2016

- Collaborate with town leadership in both towns to develop funding strategy to meet goals.
- Calculate investment growth number and reallocations from reductions in other areas and added to budgets for fiscal year 2015. Funding provided 3 Assistant Principals for elementary schools, additional psychologist and SPED positions.
- Address long-term financial health of the district through management of Excess & Deficiency account and through contribution to OPEB trust (contributed \$506,000 to ABRSD OPEB trust).
- Prepare first regional budget for FY15; implement first year of full regionalization.

### Year 5 2015-2016

- Continue to scrutinize non-classroom expenses in order to direct resources toward the classroom, consistent with Goals 1 through 5.
- Use any savings from health insurance and vacancy factor to augment staff consistent with Goal 1.
- Continue to address long-term financial health of the district through establishment and continued contribution to OPEB trust.
- Evaluate the adequacy and needs of the Excess and Deficiency (E&D) account in light of the increased size of the new school district. Work to set policies with regard to use and replenishment of E&D.
- Develop budget for strategic investments in educational improvements. Examine how funds might be better prioritized and reallocated to increase services for students.
- Continue to collaborate with town leadership in both towns to develop funding strategy to meet goals.

#### *Connection of Goal to Value:*

Educational practices and policies must be determined based on the best available research and evidence. However, in these economic times, decisions and policies are often constrained by budgetary considerations. Careful planning, in combination with ongoing measurement of outcomes, allows for educational programming that reflects best practices.



**Acton-Boxborough Regional School District**

16 Charter Road  
Acton, MA 01720  
978-264-4700 www.abschools.org

**Acton-Boxborough Regional School District  
FY '16 Budget Schedule**

12/16/14

- Sep-Oct Planning meetings with Cabinet and Principals
- 9/30/14 FY'14 workbooks issued: budget v. actual
- 10/7-10/21 Meetings with Administrators re: highlights of FY'14 actual and identify any major FY'15 budget issues
- 10/8/14 FY'16 budget instructions and workbooks issued to all administrators; Principals and Cabinet discussion of FY'16 budget assumptions, key decisions and goals
- 10/16/14 School Committee discussion of budget schedule/budget assumptions and key decisions
- 10/31/14 All completed requested operating and capital budgets and forms A, B1, B2, C turned in to Central Office
- 11/14/14 Preliminary budget compilation completed
- 11/14/14 Staffing and salary budget review/update per updated enrollment projections
- 11/1-11/30/14 Central Office meetings with administrators about budget requests
- 12/18/14 Superintendent's Budget Presentation #1
- Dec-Jan 2015 Cabinet & Principals budget meetings
- 1/8/15 Superintendent's Budget Presentation #2 and Capital Plan
- 1/22/15 Superintendent's Budget Presentation #3
- 1/31/15 Budget Saturday – All day session with school leaders; Selectmen/Finance Committee/public at large encouraged to attend; ABRSC preliminary vote
- 2/5/15 ABRSC budget hearing (required by law)
- 2/26/15 Initial ABRSD budget assessments voted by this date
- 4/6/15 Acton Town Meeting begins
- 5/11/15 Boxborough Town Meeting begins

**Acton-Boxborough Regional School District  
Appropriated Budget History -VOTED BUDGETS  
FY10 - FY15**

	APS VOTED BUDGET		ABRSD VOTED BUDGET		BMS VOTED BUDGET	
	Amount	% Budget Increase	Amount	% Budget Increase	Amount	% Budget Increase
FY10	25,753,783	3.12%	36,858,436	0.54%	5,333,590	1.14%
FY11	25,910,449	0.61%	38,228,410	3.72%	5,442,590	2.04%
FY12	26,113,719	0.78%	38,502,351	0.72%	5,608,417	3.05%
FY13	26,562,103	1.72%	39,114,804	1.59%	5,802,752	3.47%
FY14	26,960,725	1.50%	40,482,330	* 3.50%	5,798,320	-0.08%
<b>FY14 CONSTRUCTED BUDGET</b>			75,326,095			
FY15		-100.00%	76,003,826	0.90%		-100.00%
FY15 revised			76,455,123	1.50%		

**Acton-Boxborough Regional School District**  
**Appropriated Budget History -ACTUAL EXPENDITURES & ENCUMBRANCES**  
**FY10 - FY14**

	APS ACTUAL EXPENSES		ABRSD ACTUAL EXPENSES		BMS ACTUAL EXPENSES	
	Amount	% Budget Increase	Amount	% Budget Increase	Amount	% Budget Increase
FY10	25,552,993		36,633,504		5,333,588	4.04%
FY11	25,413,231	-0.55%	37,568,128	2.55%	5,360,590	0.51%
FY12	25,753,941	1.34%	38,233,184	1.77%	5,550,877	3.55%
FY13	26,371,322	2.40%	38,822,349	1.54%	5,589,586	0.70%
FY14	26,925,377	2.10%	41,536,986	6.99%	5,587,876	-0.03%
FY15	N/A		tbd		N/A	

- fy14 Includes Extra Transportation Voted from APS for 881,624, and 185,760 for Blanchard  

185,760.00
903,810.29
1,089,570.29

**ANNUAL TURNBACK AMOUNTS TO REGION AND TOWN**

<b>YEAR</b>	<b>ABRSD</b>	<b>APS</b>
FY'14	\$34,914	\$35,348
FY'13	\$292,455	\$190,781
FY'12	\$269,167	\$359,778
FY11	\$660,282	\$497,218
FY'10	\$224,931	\$200,789
FY'09	\$1,244,703	\$948,158
FY'08	\$187,359	\$7,236
FY'07	\$48,985	\$21,297
FY'06	\$344,255	\$172,266
FY'05	\$336,074	\$113,236
<b>TEN YEAR TOTAL</b>	<b>\$3,643,125.81</b>	<b>\$2,546,106.69</b>

ACTON-BOXBOROUGH REGIONAL SCHOOL DISTRICT  
EXCESS & DEFICIENCY FY'10 – FY'15

10-28-14

FY	ABRSD Budget	E&D	%
2010	\$ 36,858,436	\$ 1,711,823	4.6%
2011	\$ 38,228,410	\$ 1,925,118	5.0%
2012	\$ 38,502,351	\$ 1,892,727	4.9%
2013	\$ 39,114,804	\$ 1,510,041	3.9%
2014	\$ 41,571,900	\$ 1,100,000	2.6%
2015	\$ 76,003,826	\$ 1,100,000	1.4%

NOTES: *FY'14 is estimated, not certified ; used \$500K for FY'15*

*FY'15 assumes breakeven, and none used for FY'16 budget*

**ACTON-BOXBOROUGH REGIONAL SCHOOL DISTRICT  
FIVE YEAR HISTORY OF SELECTED SPECIAL REVENUE FUNDS  
FY10 - FY14 REVENUES**

<b>Fund #</b>	<b>Fund Name</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>	<b>FY13</b>	<b>FY14</b>
ABRSD	SCHOOL CHOICE	251,722	211,848	192,628	235,418	232,980
BMS	SCHOOL CHOICE	196,722	192,845	192,735	179,595	197,076
		<u>448,444</u>	<u>404,693</u>	<u>385,363</u>	<u>415,013</u>	<u>430,056</u>
ABRSD	CIRCUIT BREAKER	681,263	776,976	1,248,059	1,311,616	1,404,820
APS	CIRCUIT BREAKER	338,629	374,220	485,779	526,263	344,811
BMS	CIRCUIT BREAKER	115,160	105,248	107,614	122,205	90,357
		<u>1,135,052</u>	<u>1,256,444</u>	<u>1,841,452</u>	<u>1,960,084</u>	<u>1,839,988</u>
ABRSD	REGIONAL TRANSPORTATION	<u>625,225</u>	<u>633,595</u>	<u>739,687</u>	<u>685,988</u>	<u>759,546</u>
	<b>TOTALS-REIMBURSEMENTS</b>	<b>2,208,721</b>	<b>2,294,732</b>	<b>2,966,502</b>	<b>3,061,085</b>	<b>3,029,590</b>
	<b>TOTAL ARRA/ED JOBS</b>	<b>2,868,399</b>	<b>1,585,371</b>	<b>895,337</b>	<b>832,263</b>	<b>-</b>
	<b>TOTAL</b>	<b><u>5,077,120</u></b>	<b><u>3,880,103</u></b>	<b><u>3,861,839</u></b>	<b><u>3,893,348</u></b>	<b><u>3,029,590</u></b>
ABRSD	Ch 70	6,715,772	6,931,920	6,969,133	7,124,122	7,198,422
	<b>COMBINED</b>	<b><u>11,792,892</u></b>	<b><u>10,812,023</u></b>	<b><u>10,830,972</u></b>	<b><u>11,017,470</u></b>	<b><u>10,228,012</u></b>



**MONTHLY ENROLLMENT  
ACTON-BOXBOROUGH REGIONAL SCHOOLS  
2014-2015 ACADEMIC YEAR**

Levels	Sept. 1				Oct. 1				Nov. 1				Dec. 1				Jan. 1				Feb. 1				Mar. 1				Apr. 1				May 1				Jun 1			
	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot
K	274	38	7	319	275	38	7	320			0			0			0			0			0			0			0			0			0			0		
1	301	36	7	344	303	37	7	347			0			0			0			0			0			0			0			0			0					
2	312	47	8	367	314	45	8	367			0			0			0			0			0			0			0			0			0					
3	325	60	11	396	325	59	11	395			0			0			0			0			0			0			0			0			0					
4	376	55	8	439	377	55	8	440			0			0			0			0			0			0			0			0			0					
5	380	56	6	442	377	58	5	440			0			0			0			0			0			0			0			0			0					
6	357	75	4	436	356	76	4	436			0			0			0			0			0			0			0			0			0					
In D.Pre-sch. Clrm	32	5	1	38	33	5	1	39			0			0			0			0			0			0			0			0			0					
In D.Pre-sch. Itnt	16	3	0	19	17	3	0	20			0			0			0			0			0			0			0			0			0					
OOD Pre-sch	1	0	0	1	1	0	0	1			0			0			0			0			0			0			0			0			0					
O.D. SPED K-6	20	6	1	27	21	6	0	27			0			0			0			0			0			0			0			0			0					
Elem. Total	2394	381	53	2828	2399	382	51	2832	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
7	354	68	6	428	354	68	6	428			0			0			0			0			0			0			0			0			0					
8	401	72	6	479	400	73	6	479			0			0			0			0			0			0			0			0			0					
J.H.S. Total	755	140	12	907	754	141	12	907	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
9	373	76	9	458	372	76	9	457			0			0			0			0			0			0			0			0			0					
10	401	72	8	481	400	71	8	479			0			0			0			0			0			0			0			0			0					
11	405	74	7	486	404	75	7	486			0			0			0			0			0			0			0			0			0					
12	394	82	8	484	393	82	8	483			0			0			0			0			0			0			0			0			0					
9-12 Ungr.	0	0	0	0	0	0	0	0			0			0			0			0			0			0			0			0			0					
P.G.	0	0	0	0	0	0	0	0			0			0			0			0			0			0			0			0			0					
H.S. Total	1573	304	32	1909	1569	304	32	1905	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
Secondary Total	2328	444	44	2816	2323	445	44	2812	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
O.D. SPED 7-12	58	9	0	67	57	9	1	67			0			0			0			0			0			0			0			0			0					
Reg. Total	2386	453	44	2883	2380	454	45	2879	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
Elem Total	2394	381	53	2828	2399	382	51	2832	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
Secondary Total	2386	453	44	2883	2380	454	45	2879	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
Grand Total	4780	834	97	5711	4779	836	96	5711	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				

A = ACTON  
B = BOXBOROUGH  
C = Choice/Staff/Tuition In

Pre-School = SPED  
P.G. = Post Graduates  
Ungr. = Ungraded  
O.D. = SPED Out of District

In D. = In District

Distribution:

G. Brand  
M. Altieri  
D. Bookis

C. Jeannotte  
A. Bisewicz  
K. Nelson  
E. Weiner  
R. Cvitkovich

D. Labb

All Principals (2)

Students other than Choice counted under column C:  
Staff Students -  
Tuition In Students -  
Sped Tuition In Students

## Update on School Enrollment Projections 2014

Peter K. Ashton  
Mary Ann Ashton

November 6, 2014

### Enrollment Continues to Decline

- Enrollment this year is down in both towns
  - Region experienced a decline of 108 students or 2% broken down as follows:

Acton:

- Elementary enrollment declined by 25 students
- JHS declined by 11 students
- HS declined by 27 students

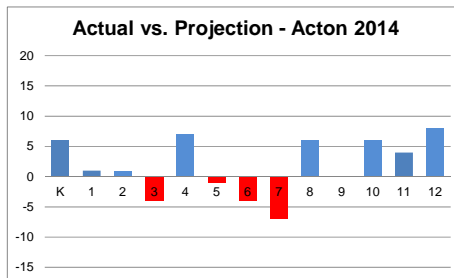
Boxborough:

- Elementary down by 8 students
- JHS decreased by 9 students
- HS decreased by 28 students

- Continuation of long term trend

## Difference between Projection and Actual for 2014

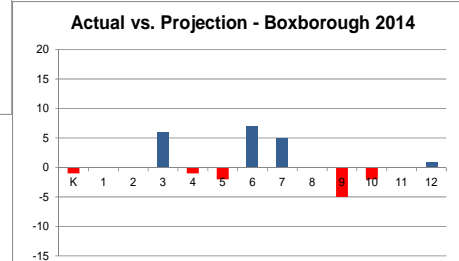
This is where we attempt to show how good we are at predicting the future. Of course this is only one year out, but overall we *under* predicted by 31 students or an error rate of less than 0.5%



Blue means we under predicted, red means we over predicted, e.g., for Acton kindergarten we predicted 269 and 275 arrived

3

Looking back 7 years we were only off by about 3.5% in predicting this year's total enrollment.



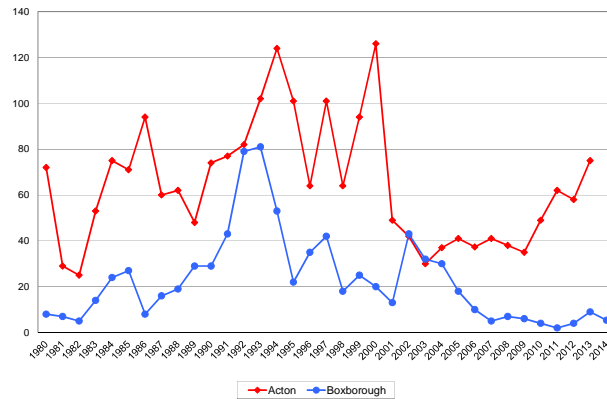
## What is the Cohort Survival Method?

- Computes the ratio of children in one grade compared to the number who “survive” to the next grade
  - Starting point is birth to kindergarten ratio
    - based on relationship between kindergarten enrollments and live births five years earlier
  - Grade progression ratios follow the number of children who advance from one grade to the next
  - Relies on birth data and birth projections
  - Captures effects of net migration, population changes, retention rates, housing trends
    - Assumes history is a reasonable predictor of the future
- Use 5 year average of historical trends

4

## Building Permits by Town

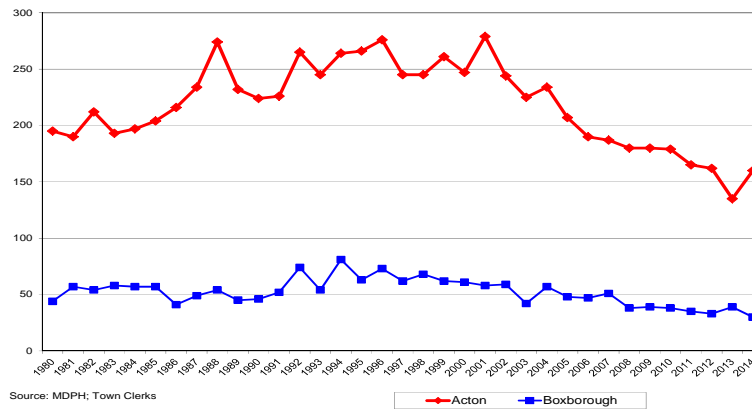
SF Building Permits:



- The number of single family permits in Acton is increasing again after a decade long decline
- Boxborough housing permits have been declining since 2002

5

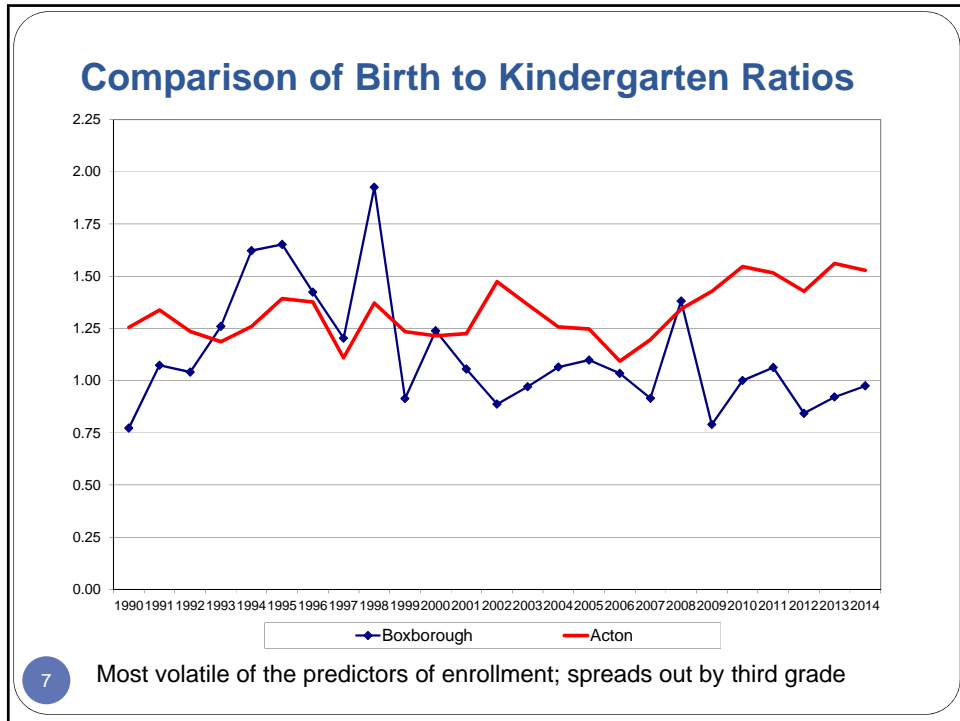
## Births in Acton and Boxborough



Source: MDPH; Town Clerks

- Acton and Boxborough births declining since 2002; 2013 appears anomalous for Acton
- Reflects a state-wide trend of declining births
- Our birth model suggests some slight increase in the future, but well below the trend observed in 1990s and early 2000s

6



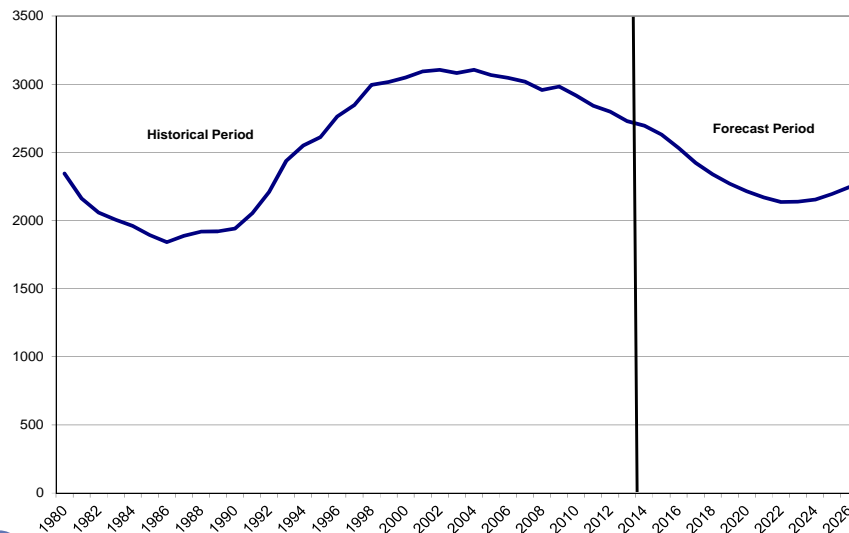
- ## Enrollment Projections
- Projections developed using “standard” model (excludes “choice”)
  - Project separately for the two towns given different trends
  - Birth projections have been revised downward again
  - Residential development on the wane in both towns
  - Housing turnover is picking up as housing market recovers
  - Decline in births and low new construction lead to decrease in enrollment over the next decade
    - If turnover accelerates, this could mitigate the decline slightly
- 8

## Enrollment Projections

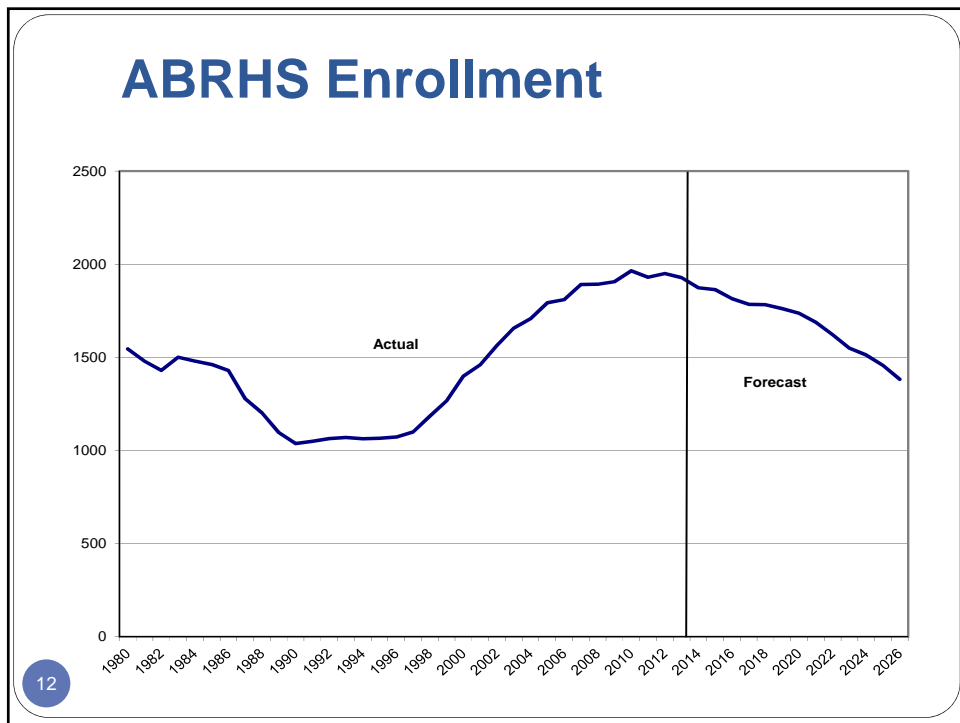
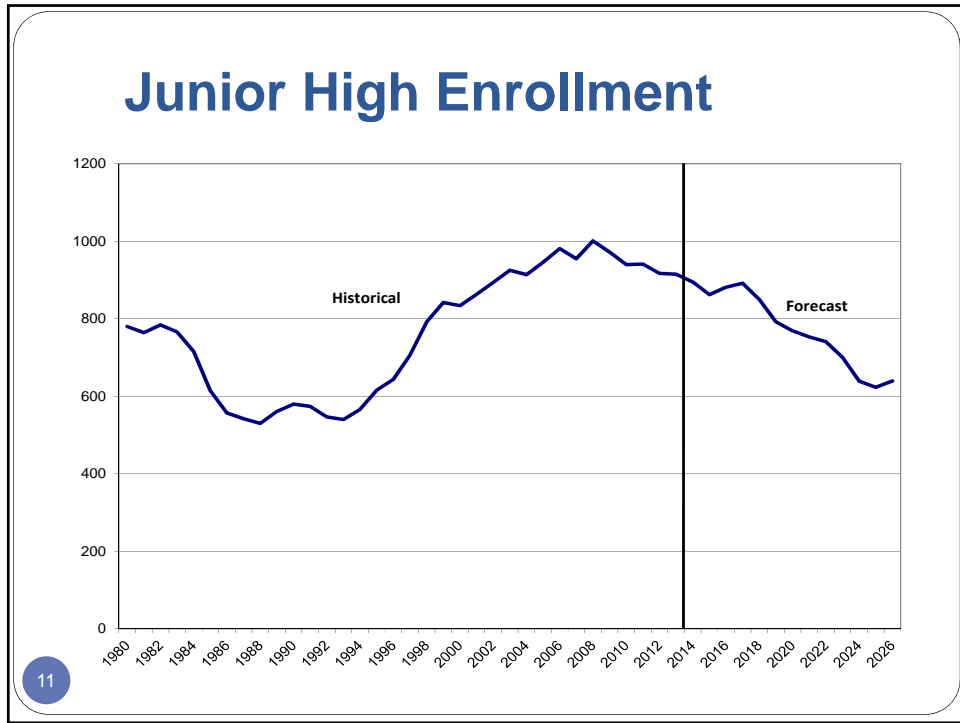
- Region-wide enrollment continues to decline for the foreseeable future
  - A decline of almost 1,200 students region-wide vs. today's enrollment
- Enrollment doesn't begin to increase until 2023 at elementary level
  - Regional elementary enrollment drops by about 550 students between now and 2022; then increases by about 100 students by 2026
  - JHS/SHS both continue to drop; total decline is 740 students between now and 2026
    - Total enrollment at JHS drops to about 625 by 2025
    - HS enrollment drops to 1400 by 2026

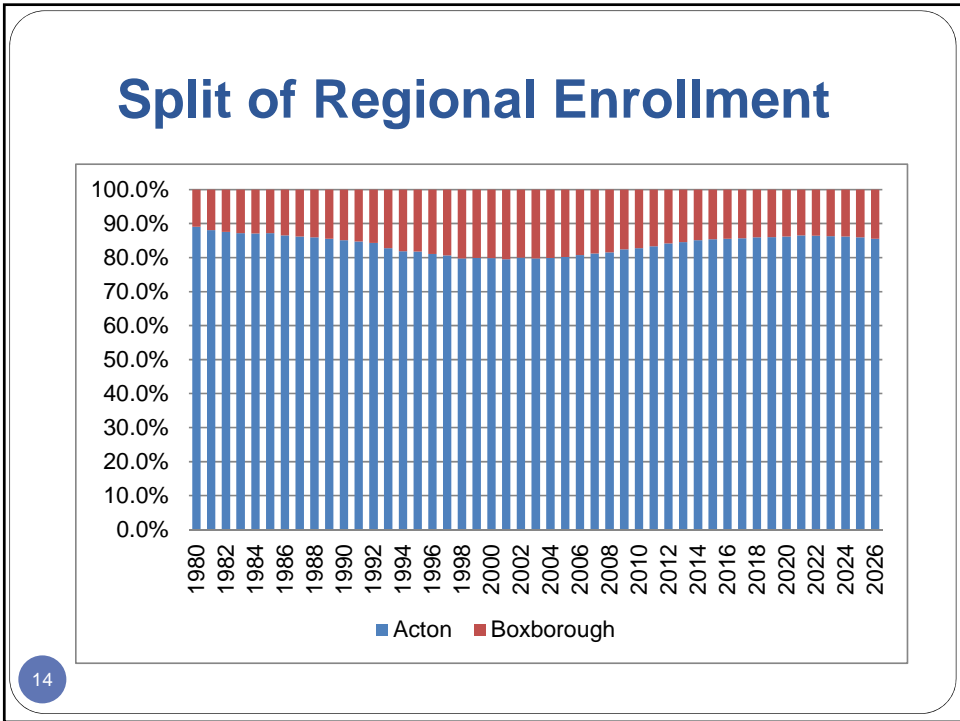
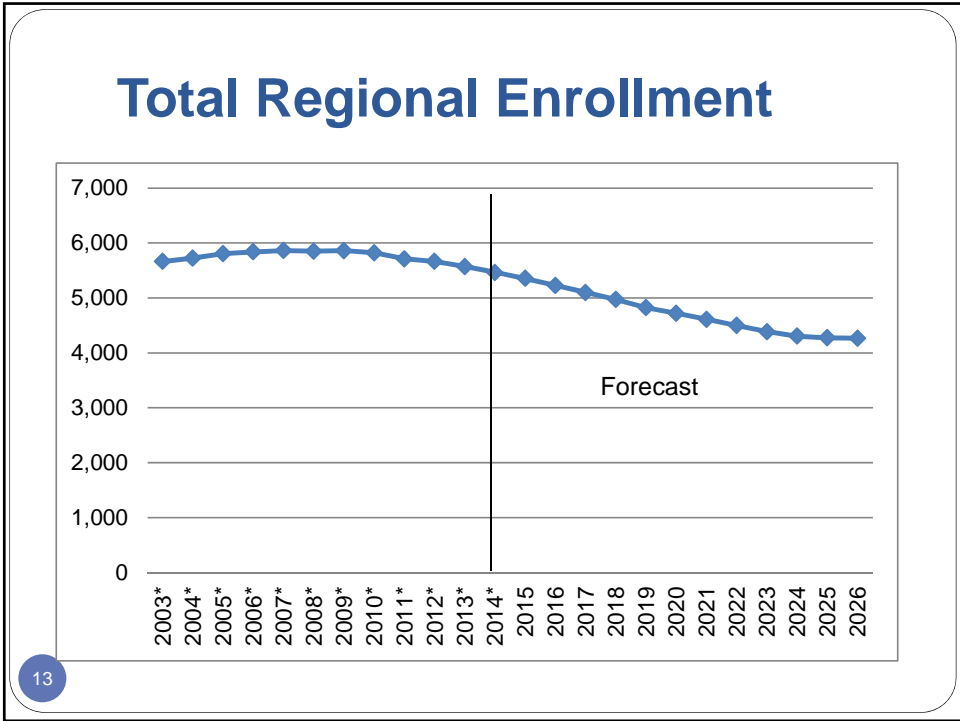
9

## Regional K-6 Enrollment



10







**Enrollment Projections**  
**Acton-Boxborough Regional School District**

**November 2014**

**Revised Enrollment Projections - 11/14**

PUBLIC SCHOOL ENROLLMENT PROJECTIONS									
Elementary School									
Acton, MA: 2003-2026									
Year	K-12	K	1	2	3	4	5	6	Total
2003*	4,517	334	348	369	360	355	365	349	2,480
2004*	4,575	328	352	363	376	365	361	379	2,524
2005*	4,654	308	352	359	372	380	375	370	2,516
2006*	4,712	305	315	371	375	375	387	390	2,518
2007*	4,762	292	320	340	389	394	382	397	2,514
2008*	4,773	301	326	336	349	381	404	384	2,481
2009*	4,830	334	333	349	358	359	391	407	2,531
2010*	4,815	320	347	342	344	369	360	394	2,476
2011*	4,760	294	333	354	351	351	369	361	2,413
2012*	4,768	267	312	348	382	354	354	382	2,399
2013*	4,713	281	302	316	365	375	355	358	2,352
2014*	4,650	275	303	314	325	377	377	356	2,327
2015	4,574	271	294	312	325	330	378	382	2,292
2016	4,472	250	290	303	322	329	331	383	2,209
2017	4,370	246	268	299	313	327	331	335	2,118
2018	4,271	224	263	275	309	318	328	335	2,052
2019	4,149	228	240	270	285	313	319	332	1,988
2020	4,069	232	244	247	279	289	315	323	1,929
2021	3,989	236	248	251	255	284	290	318	1,883
2022	3,887	240	252	256	260	259	285	293	1,845
2023	3,783	244	257	260	264	264	260	288	1,836
2024	3,711	247	261	264	269	268	265	263	1,837
2025	3,674	251	265	268	273	273	269	268	1,867
2026	3,650	262	269	272	277	277	274	272	1,903

PUBLIC SCHOOL ENROLLMENT PROJECTIONS			
Junior School			
Acton, MA: 2003-2026			
Year	7	8	Total
2003*	375	354	729
2004*	351	368	719
2005*	391	351	742
2006*	382	400	782
2007*	395	381	776
2008*	402	407	809
2009*	393	402	795
2010*	395	401	796
2011*	391	408	799
2012*	375	396	771
2013*	389	376	765
2014*	354	400	754
2015	357	361	717
2016	382	364	746
2017	384	390	773
2018	336	391	727
2019	335	342	677
2020	333	342	675
2021	323	339	663
2022	319	330	648
2023	289	325	614
2024	264	294	558
2025	268	269	537
2026	273	274	547

PUBLIC SCHOOL ENROLLMENT PROJECTIONS					
High School					
Acton, MA: 2003-2026					
Year	9	10	11	12	Total
2003*	343	328	315	322	1308
2004*	362	338	332	300	1332
2005*	368	361	341	326	1396
2006*	345	364	369	334	1412
2007*	391	345	366	370	1472
2008*	385	394	342	362	1483
2009*	402	382	383	337	1504
2010*	402	390	370	381	1543
2011*	385	415	387	361	1548
2012*	408	392	419	379	1598
2013*	394	404	393	405	1596
2014	372	400	404	393	1569
2015	396	374	398	397	1565
2016	357	398	372	391	1518
2017	360	359	395	366	1479
2018	385	361	357	389	1492
2019	387	387	359	351	1484
2020	338	389	385	353	1466
2021	338	340	387	379	1443
2022	336	340	338	380	1394
2023	326	337	338	333	1334
2024	321	328	335	332	1317
2025	291	323	326	330	1270
2026	266	292	321	320	1200

**Revised Enrollment Projections - 11/14**

PUBLIC SCHOOL ENROLLMENT PROJECTIONS									
Elementary School									
Boxborough, MA: 2003-2026									
Year	K-12	K	1	2	3	4	5	6	Total
2003*	1,146	66	68	91	87	86	108	95	601
2004*	1,151	66	70	74	98	79	85	109	581
2005*	1,152	67	74	67	75	96	84	88	551
2006*	1,126	60	67	76	68	76	95	87	529
2007*	1,102	54	70	69	72	68	76	95	504
2008*	1,078	58	57	72	71	70	72	77	477
2009*	1,030	45	59	60	66	74	74	73	451
2010*	1,005	48	54	66	61	68	73	70	440
2011*	952	51	49	53	66	60	72	77	428
2012*	897	43	52	51	53	63	65	72	399
2013*	858	35	43	53	55	57	69	64	376
2014*	813	38	37	45	59	55	58	76	368
2015	782	36	40	39	47	60	58	59	338
2016	756	34	39	42	40	47	62	59	323
2017	728	32	36	40	44	40	50	63	305
2018	700	37	34	37	42	44	42	50	287
2019	673	37	40	35	39	42	46	43	282
2020	650	37	40	41	36	39	44	47	285
2021	621	39	39	41	43	37	41	45	286
2022	611	41	42	41	43	43	39	42	291
2023	604	43	44	43	43	43	46	39	301
2024	594	45	46	46	45	43	46	46	317
2025	599	47	48	48	47	46	45	46	327
2026	616	50	50	50	50	48	48	46	341

PUBLIC SCHOOL ENROLLMENT PROJECTIONS			
Junior High			
Boxborough, MA: 2003-2026			
Year	7	8	Total
2003*	97	99	196
2004*	99	96	195
2005*	103	101	204
2006*	91	108	199
2007*	87	92	179
2008*	99	93	192
2009*	77	100	177
2010*	69	75	144
2011*	71	71	142
2012*	74	72	146
2013*	72	78	150
2014*	68	73	141
2015	76	69	145
2016	59	77	136
2017	58	60	118
2018	63	59	123
2019	50	64	115
2020	43	51	94
2021	47	44	91
2022	45	48	93
2023	41	46	87
2024	39	42	81
2025	46	40	86
2026	46	47	93

PUBLIC SCHOOL ENROLLMENT PROJECTIONS					
High School					
Boxborough, MA: 2003-2026					
Year	9	10	11	12	Total
2003*	97	100	74	78	349
2004*	97	102	101	75	375
2005*	103	91	101	102	397
2006*	100	104	96	98	398
2007*	116	100	106	97	419
2008*	87	116	100	106	409
2009*	97	88	116	101	402
2010*	108	101	97	115	421
2011*	78	109	99	96	382
2012*	71	74	107	100	352
2013*	72	73	81	106	332
2014*	76	71	75	82	304
2015	74	76	74	75	299
2016	70	75	79	74	298
2017	78	71	77	79	305
2018	61	79	73	77	290
2019	61	61	82	73	276
2020	66	61	63	82	271
2021	52	66	63	63	244
2022	45	52	68	63	228
2023	49	45	54	68	215
2024	47	49	46	54	196
2025	43	47	50	46	186
2026	40	43	48	50	182

**Revised Enrollment Projections - 11/14**

PUBLIC SCHOOL ENROLLMENT PROJECTIONS									
Elementary School									
ABRSD: 2010-2026									
Year	K-12	K	1	2	3	4	5	6	Total
2010*	5,820	368	401	408	405	437	433	464	2,916
2011*	5,712	345	382	407	417	411	441	438	2,841
2012*	5,665	310	364	399	435	417	419	454	2,798
2013*	5,571	316	345	369	420	432	424	422	2,728
2014*	5,463	313	340	359	384	432	435	432	2,695
2015	5,356	308	335	350	371	389	436	441	2,630
2016	5,228	284	329	345	362	377	393	442	2,532
2017	5,099	277	303	339	357	368	380	399	2,422
2018	4,971	262	296	312	351	362	371	385	2,339
2019	4,823	266	280	305	323	356	365	375	2,270
2020	4,720	269	284	288	316	328	359	370	2,214
2021	4,610	275	288	293	298	320	331	363	2,169
2022	4,498	281	294	297	303	302	323	335	2,136
2023	4,387	287	300	303	307	307	306	327	2,137
2024	4,305	293	306	310	314	311	310	309	2,153
2025	4,273	298	313	316	320	318	314	314	2,194
2026	4,266	312	319	322	327	325	321	318	2,244

PUBLIC SCHOOL ENROLLMENT PROJECTIONS			
Junior School			
ABRSD: 2010-2026			
Year	7	8	Total
2010*	464	476	940
2011*	462	479	941
2012*	449	468	917
2013*	461	454	915
2014*	422	473	895
2015	432	430	862
2016	441	441	882
2017	442	449	892
2018	399	451	849
2019	385	407	792
2020	376	393	769
2021	370	383	753
2022	364	377	741
2023	330	371	701
2024	303	336	639
2025	315	308	623
2026	319	321	640

PUBLIC SCHOOL ENROLLMENT PROJECTIONS					
High School					
ABRSD: 2010-2026					
Year	9	10	11	12	Total
2010*	510	491	467	496	1964
2011*	463	524	486	457	1930
2012*	479	466	526	479	1950
2013*	466	477	474	511	1928
2014	448	471	479	475	1873
2015	470	450	471	472	1864
2016	427	472	451	465	1815
2017	438	429	473	445	1785
2018	446	440	430	466	1782
2019	447	448	441	424	1761
2020	404	450	449	435	1737
2021	390	406	450	442	1688
2022	380	392	406	443	1622
2023	374	382	392	401	1549
2024	368	376	382	386	1512
2025	334	370	376	376	1456
2026	306	335	370	371	1382

Excludes choice  
\* Actual data

Sources: Acton-Boxborough School System  
Acton Town Clerk & Building Commissioner  
Mass. Department of Public Health

NOTE: This scenario is a result of utilizing 5 year average for grade to grade ratios and for kindergarten to birth ratio



**Acton-Boxborough Regional School District**

16 Charter Road  
Acton, MA 01720  
978-264-4700 www.abschools.org

6.

**Glenn A. Brand**  
*Superintendent*

DATE: October 9, 2014  
TO: All Administrators  
FROM: Glenn Brand, Superintendent  
cc: Acton-Boxborough Regional School Committee  
SUBJECT: FY'16 Budget Assumptions/Key Decisions

*The following budget assumptions/key decisions are not listed in priority order.*

**Funding Sources:**

1. Assume level funded state/federal entitlement grant funds, unless otherwise indicated.
2. Assume limited or no reliance on E&D as a funding source.
3. Administration shall review the feasibility of accepting new School Choice students and make a recommendation to the School Committee.
4. Assess existing user fees (e.g. interscholastic athletics, all day kindergarten tuition, preschool tuition, school lunch, etc.) and determine if fees should be increased and/or new fees should be instituted.
5. Identify support of operations funded by other funding sources, including special revenue funds, community education, and PTO's. Assess level of continued support available.

**Level Service Operating Expenditures:**

1. Determine OPEB funding level.
2. Identify fixed cost obligations/assessments as early as possible (debt service, retirement assessments).
3. Assume efforts to provide special education programming in district where student-effective and cost effective.
4. Coordinate with Acton Health Insurance Trust to determine FY'16 health insurance premiums as early as possible.
5. Decide appropriate number of sections at all grade levels based upon class size policies and updated enrollment projections K-12.
6. Review/determine proper staffing levels for other staff K-12 (e.g., counselors, nurses, technology support, custodians, monitors, etc.).
7. Review/determine appropriate level for professional development (K-12).

8. Budget for technology replacement and ongoing operating costs in the operating budgets , and summarize new technology initiatives separately with descriptions and purpose.
9. Budget for continuing facility maintenance and upkeep in the operating budget; identify new acquisitions (equipment and furnishings > \$5,000) as capital outlay. Replacements of items <\$5,000 shall be budgeted in non-outlay accounts.
10. Legal mandates are funded.

**Program considerations:**

- a. Quantify cost of change to single tier bussing and recommended timeframe for implementation.
- b. Obtain personnel, capital and program expansion or reduction recommendations (Forms A, B1, B2, C) from all Administrators, summarize and evaluate collaboratively. Any new positions should factor in \$17,000/year for benefits. The budgeted cost for a new certified position at M3 would be \$54,000.
- c. Determine long range (5 year) capital plan proposal with Director of Facilities. Determine whether and which projects should go forward, and what funding mechanism (debt inside the regional district operating budget, debt exclusion override by two towns, or one-time revenues) should be used.
- d. Reconsideration of status of unfunded program needs raised in the FY15 budget process.
- e. Budgetary impact of District priorities relative to mental health and wellness of our students.
- f. Recognition that our budget now reflects a PreK-12 unified district.

## ACTON-BOXBOROUGH REGIONAL SCHOOL DISTRICT

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FY16 BUDGET PRESENTATION #1:  
SETTING THE STAGE  
December 18, 2014

2

### Setting the Stage

- The administration is engaged in the development of the 2015-16 (FY16) operating budget for the full PreK-12 regional district
- This first presentation attempts to set the foundation upon which the FY16 budget request is being built

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## Budget Priorities for FY15

- A review of the budgetary priorities for this current year include three (3) priorities:
  - i. Developing a unified Pre-K to 12 budget
  - ii. Meet the growing state and federal requirements for school leadership
  - iii. Meet the needs of increasing numbers of our at risk-students

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## Budget Priorities FY16

- We continue to benefit from savings and realignment from regionalization
- State and federal mandates will continue as a challenge for districts throughout the Commonwealth
- Our greatest challenge continues to be a strong focus on providing our district with the capacity and resources necessary to meet the needs of all students in light of rapidly increasing at-risk and higher needs students
  - Special Education
  - English Language Learners (ELL)
  - Low Income



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## Enrollment Snapshot:

### Highlights:

- Enrollment continues to be a factor to watch closely
- Enrollment is down in both Acton and Boxborough this year following recent trends and projections
- As we look to FY16 we are projecting some minor reductions

	Acton Prek-6	Acton 7 & 8	Acton 9-12	Boxborough Prek-6	Boxborough 7 & 8	Boxborough 9-12
2013-14	2352	765	1596	376	150	332
2014-15	2327	754	1569	368	141	304
2015-16	2292	717	1565	338	145	299

*Does not include Choice or AB Staff*

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## Enrollment Continued

- Within the FY16 budget the administration has carefully reviewed the data and has made reductions that reflect School Committee class size guidelines
- It is important to keep in mind that these changes, especially at the elementary level, are dispersed across six (6) elementary schools
- As we consider our long-term personnel needs, enrollment as a factor is not the only point to consider – but so too is the intensity of the growing needs of some of our student population.

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## FY16 Budget Building Assumptions

As provided to the School Committee at the October 16 meeting:

### *Funding Sources:*

The FY16 preliminary budget is built around the following as assumptions of funding sources:

- i. Level funded state/federal entitlement grant funds
- ii. Limited reliance on E & D
- iii. No new School Choice students, except siblings
- iv. Existing User fees (with the exceptions presented this evening)

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## FY16 Budget Building Assumptions

### *Level Services:*

The following level service operating expenditures are considered as a part of this budget:

- i. OPEB funding level
- ii. Fixed costs and obligations
- iii. Special Education programming in district where possible
- iv. Health Insurance Premiums
- v. Number of teaching sections at all grade levels based upon class size guidelines and enrollment projections
- vi. Appropriate staffing levels for other Prek-12 staff
- vii. Continuation of commitment to professional development
- viii. Continued technology replacement
- ix. Legal mandates are met

## FY16 Budget Building Assumptions

### *Excess & Deficiency Funds*

- Every regional school district shall maintain an excess and deficiency fund
- A regional school committee may use all or part of the certified balance in the E & D fund as a revenue source for its proposed budget
- If the certified balance exceeds 5% of the proposed budget the Committee must use the amount in excess of the 5% as a revenue source for its proposed budget

## FY16 Budget Building Assumptions

### *E & D continued*

FY	ABRSD Budget	E & D	% of Budget
2010	\$36,858,436	\$1,711,823	4.6%
2011	\$38,228,410	\$1,925,118	5.0%
2012	\$38,502,351	\$1,892,727	4.9%
2013	\$39,114,804	\$1,510,041	3.9%
2014	\$41,571,900	\$1,100,000	2.6%
2015	\$76,003,826	\$1,100,000	1.4%

- *FY14 is not certified; used \$500,000 for FY15*

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## FY10-15 Appropriated Budget History – Voted Budget

	APS	% Budget Increase	BMS	% Budget Increase	ABRSD	% Budget Increase
FY10	25,753,783	3.12	5,333,590	1.14	36,858,436	0.54
FY11	25,910,449	0.61	5,442,590	2.04	38,228,410	3.72
FY12	26,113,719	0.78	5,608,417	3.05	38,502,351	0.72
FY13	26,562,103	1.72	5,802,752	3.47	39,114,804	1.59
FY14	26,960,725	1.5%	5,798,320	-.08	40,482,330	3.50
FY14 Constructed					75,326,095	
FY15					76,003,826	0.90
FY15 Revised					76,455,123	1.50

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## Turnback History

	ABRSD	APS
FY '14	\$34,914	\$35,348
FY '13	\$292,455	\$190,781
FY '12	\$269,167	\$359,778
FY '11	\$660,282	\$497,218
FY '10	\$224,931	\$200,789
FY '09	\$1,244,703	\$948,158
FY '08	\$187,359	\$7,236
FY '07	\$48,985	\$21,297
FY '06	\$344,255	\$172,266
FY '15	\$336,074	\$113,236
Ten Year Total	<b>\$3,643,125</b>	<b>\$2,546,106</b>

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## Current Assumptions for Revenues and other Funding Sources

- Governor's Budget will be released at the end of February
- Assuming Chapter 70 at \$25 per student minimum increase, roughly 1%
- Assuming Regional Transportation aid at FY'15 budgeted levels (consistent with possible 9C cuts)
- Assuming Circuit Breaker at 70%
- Minimize use of E&D – currently recommending \$250K

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## Budget Drivers

- OPEB
- Middlesex Retirement
- Health Insurance
- Salaries
- Debt Service
- Sped Transportation
- Sped Tuition

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## OPEB

- ABRSD began funding OPEB out of the operating budget in FY '13
 

FY '13	\$236,000
FY '14	\$376,000
FY '15	\$506,000
- To fully fund the \$1.4 million combined Town of Acton and ABRSD FY '16 plan, ABRSD would need to contribute about \$900K in FY '16. We are recommending a more gradual approach, allowing us to get to \$900K in FY '17.
- Recommending \$700,000 in FY '16 budget

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## Middlesex Retirement

- The School Committee October re-vote of the FY '15 Regional Assessment fully funded the Middlesex Assessment that is being partially paid by the two towns
- Even with that, Middlesex has a large increase for FY '16
 

Original FY '15 Budget	\$1,366,653
Revised FY '15 Budget	\$1,756,208
Preliminary FY '16 Assessment	\$2,059,997 (17.3% increase)
- The new FY '16 Middlesex Assessment has some town employees on the school list and some school employees on the town list. We are working with them to verify, and the preliminary assessment may change.

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## Health Insurance

- Current recommendation from the Health Insurance Trust  
7% - 8%
- We put 8% for actives and retirees in the preliminary budget, hoping that it will be able to be reduced once the HIT votes actual rates
- The trust will be implementing a new retiree prescription drug plan (EGWP) which should lower rates

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## Salaries – FY '16

- Teachers' Salaries  
1.5% COLA  
plus 2.7% Steps/Lanes/Supermax
- Support Staff  
Office Support, Custodians, Bus Drivers, Sped Assistants,  
Classroom Assistants, Cafeteria, etc.  
1.5% COLA  
0.5% Steps

Added hours for Thursday afternoons and one extra professional day since these were approved after the FY '15 budget was voted

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## Salaries

- Changes in Staffing
  - Reduction of two elementary classroom sections for decreasing enrollment
  - Moving some support staff from revolving accounts to budget due to decreased revenues
  
- Retirements
  - 12 Teachers Retiring
  - Early Retirement Incentive Added to Budget  
Salary for replacements budgeted at Master's step 3 (\$53,541)

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## Debt Service

- Refinancing the debt provided savings in the FY '15 budget. Anticipated debt service increase for FY '16 is 4%

FY '14	\$2,020,296	
FY '15	\$1,847,734	(9% decrease)
FY '16	\$1,920,743	(4% increase)



## Sped Tuition and Transportation

- The increases in Special Education Tuition in FY '15 and the revision of the CASE assessment methodology continues to be a budget driver
- Sped Tuition (net of Circuit Breaker Reimbursement)
  - FY '14 \$4,145,625
  - FY '15 \$5,213,514 (26% increase)
  - FY '16 \$5,316,404 (2% increase)
- Sped Transportation
  - FY '14 \$1,454,538
  - FY '15 \$1,340,411 (8% decrease)
  - FY '16 \$1,572,647 (17.3% increase)

## Future Budgetary Conversations

- January 8 – Superintendent's FY16 Preliminary Budget Presentation #2; Recommended Overall Budget and Assessment Increases
- January 22 – FY16 Budget Discussion; Detailed Budget by Account available
- January 31 – Budget Saturday
- February 5 – Public Hearing on FY16 Budget