



Fall River Public Schools FY24 Budget Proposal

Presented by Maria Pontes, Superintendent
and Kevin Almeida, Chief Financial Officer
March 20, 2023

What is an *Annual Budget*?

*A budget is a moral document. What we **fund** is what we **value**.*



- Financial Planning Tool
- Communication Vehicle
- Living Document
- Acknowledgment of the Work Ahead
- Complement to District Planning
- Statement of What We Value

Budget Priorities: What We Fund Is What We Value

Core Instruction in a Multi-Tiered System

- ★ HQIM Adoption
- ★ Professional Development
- ★ Coaching/Teacher Leadership
- ★ SEL and behavioral Support
- ★ Intervention Training
- ★ Instructional Staff
- ★ Support Staff
- ★ Out of school time programming
- ★ Community Partnerships

Special Education Programming & Supports

- ★ Additional staffing to support inclusive instruction
- ★ Professional development to support inclusive practices
- ★ Professional development on rules based reading

Multilingual Learner Programming & Supports

- ★ Additional staffing to support inclusive instruction
- ★ Additional staffing to support staff development
- ★ Professional development to support learning and teaching in foundational and mainstream classrooms

College & Career Pathways

- ★ Early College
- ★ Alternative pathways
- ★ Dual Language Education
- ★ Pre-K classrooms
- ★ Career Technical Education

Instructional Technology & Student Information

- ★ Human Capital to support tech integration
- ★ Maintenance of digital platform
- ★ Analytics dashboard
- ★ Student Information System
- ★ Tech hardware life cycle replacement, additions, and upgrades

Facilities & Operations

- ★ Pre-K expansion sites
- ★ Facility acquisition
- ★ HVAC upgrades
- ★ Districtwide roof conditions survey and capital planning
- ★ School facilities upgrades
- ★ Safety & Security

Family & Community Engagement

- ★ Bilingual outreach staff
- ★ Family support specialists
- ★ Parent Education series
- ★ Play & Learn groups
- ★ Staff Development

Human Resources

- ★ Recruitment & Retention of staff
- ★ Professional Onboarding
- ★ Staff Attendance/Absence Management

Funding What We Value: How do we get there?



The Foundation Formula

Foundation Budget



An adequate funding level for each district, given the specific grades, programs, and characteristics of its students - representing **minimum** spending needed.

=

Required Local Contribution



How much of the foundation budget **required** to be paid for by each city/town's property taxes, based on the relative wealth of the city.

+

Chapter 70 Aid



Whatever amount is **remaining** after the city/town has fulfilled its local contribution.

Funding What We Value: How do we get there?



Chapter 70 Aid

Key Factors in the School Funding Formula

$$\text{(Foundation Budget)} - \text{(Required Local Contribution)} = \text{(Chapter 70 Aid)}$$

→ Student Enrollment

→ Property Value

→ Wage Adjustment Factor

→ Income

→ Inflation

→ Municipal Revenue Growth Factor



*Used to establish the **Foundation Budget** and **Local Contribution**, these six factors work together to determine a district's **Chapter 70 Aid**.*

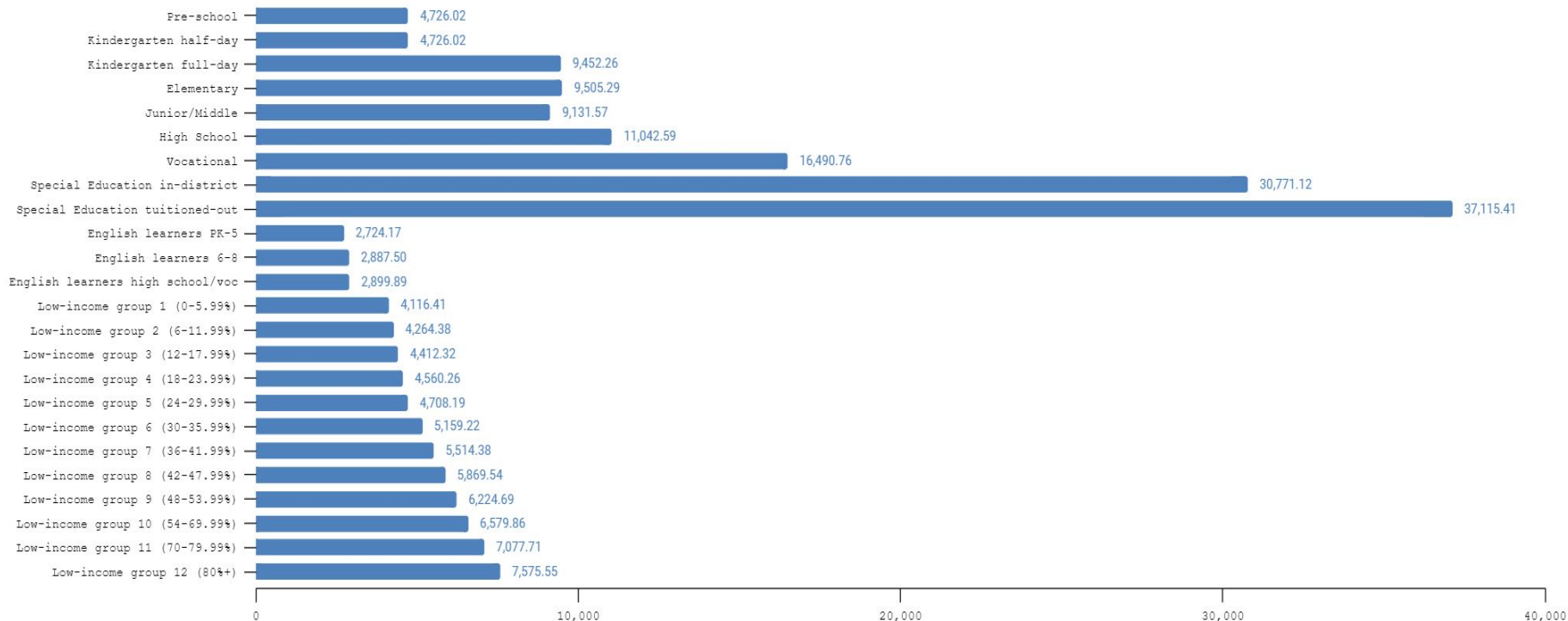
The Foundation Budget - *Role of Student Enrollment*

	Base Foundation Components							Incremental Costs Above the Base						
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
		----- Kindergarten -----			Junior/	High		Special Ed	Special Ed	English learners	English learners	English learners		
	Pre-school	Half-Day	Full-Day	Elementary	Middle	School	Vocational	In-District	Tuitioned-Out	PK-5	6-8	High School/Voc	Low income	TOTAL
Foundation Enrollment	315	0	931	4,863	3,030	2,452	804	479	113	1,396	512	647	10,024	12,238
1 Administration	69,722	0	412,126	2,152,704	1,341,290	1,085,427	355,907	1,463,426	399,063	150,293	58,429	74,146	1,028,763	8,591,297
2 Instructional Leadership	125,918	0	744,344	3,888,017	2,422,515	1,960,399	642,806	0	0	263,006	102,241	129,756	4,874,270	15,153,273
3 Classroom & Specialist Teachers	577,389	0	3,413,009	17,827,320	9,774,841	11,632,558	6,484,300	4,828,933	0	1,840,961	715,679	908,272	47,582,424	105,585,685
4 Other Teaching Services	148,082	0	875,373	4,572,436	2,050,825	1,381,604	453,022	4,508,707	6,096	263,006	102,241	129,756	0	14,491,148
5 Professional Development	22,834	0	135,051	705,524	476,498	373,905	202,696	232,942	0	75,133	29,210	37,067	2,308,427	4,599,287
6 Instructional Materials, Equipment & Tech*	83,566	0	493,998	2,580,356	1,607,748	2,081,650	1,194,479	203,321	0	187,846	73,027	92,676	353,847	8,952,515
7 Guidance & Psychological Services	54,621	0	322,889	1,686,586	1,184,669	1,091,410	357,868	0	0	112,713	43,822	55,610	1,926,813	6,837,002
8 Pupil Services	16,708	0	98,807	774,044	787,830	1,470,146	482,054	0	0	37,580	14,607	18,537	10,011,971	13,712,284
9 Operations & Maintenance	160,335	0	947,749	4,950,485	3,343,969	2,623,836	1,610,179	1,634,712	0	450,852	175,268	222,432	0	16,119,817
10 Employee Benefits/Fixed Charges*	229,522	0	1,356,709	7,086,753	4,678,472	3,375,497	1,475,260	1,867,324	0	421,550	163,876	207,978	7,850,797	28,713,736
11 Special Education Tuition*	0	0	0	0	0	0	0	0	3,788,882	0	0	0	0	3,788,882
12 Total	1,488,696	0	8,800,054	46,224,225	27,668,657	27,076,431	13,258,571	14,739,366	4,194,041	3,802,941	1,478,400	1,876,229	75,937,313	226,544,926
13 Wage Adjustment Factor	100.0%										Foundation Budget per Pupil			18,512

*The wage adjustment factor is applied to underlying rates in all functions except instructional equipment, benefits and special education tuition.

A district's **foundation budget** is derived by multiplying the number of pupils in **13 enrollment categories** by cost rates in **11 functional areas**.

Foundation budget rates reflect differences in the cost of educating different types of students.



How is the required local contribution calculated?

Determining each community's target local share starts with the local share of statewide foundation.

Calculate statewide foundation budget.

Statewide foundation budget
\$13.965B

Determine target local share of statewide foundation.

41% State aid
\$5.726B

59% Local contribution
\$8.239B

Statewide, determine percentages that yield $\frac{1}{2}$ from property and $\frac{1}{2}$ from income.

Income effort
1.5329%
\$4.120B

Property effort
0.3534%
\$4.120B

Property and income percentages are applied uniformly across all cities and towns to determine the **combined effort yield** from property and income.

Funding What We Value: How do we get there?

Net School Spending

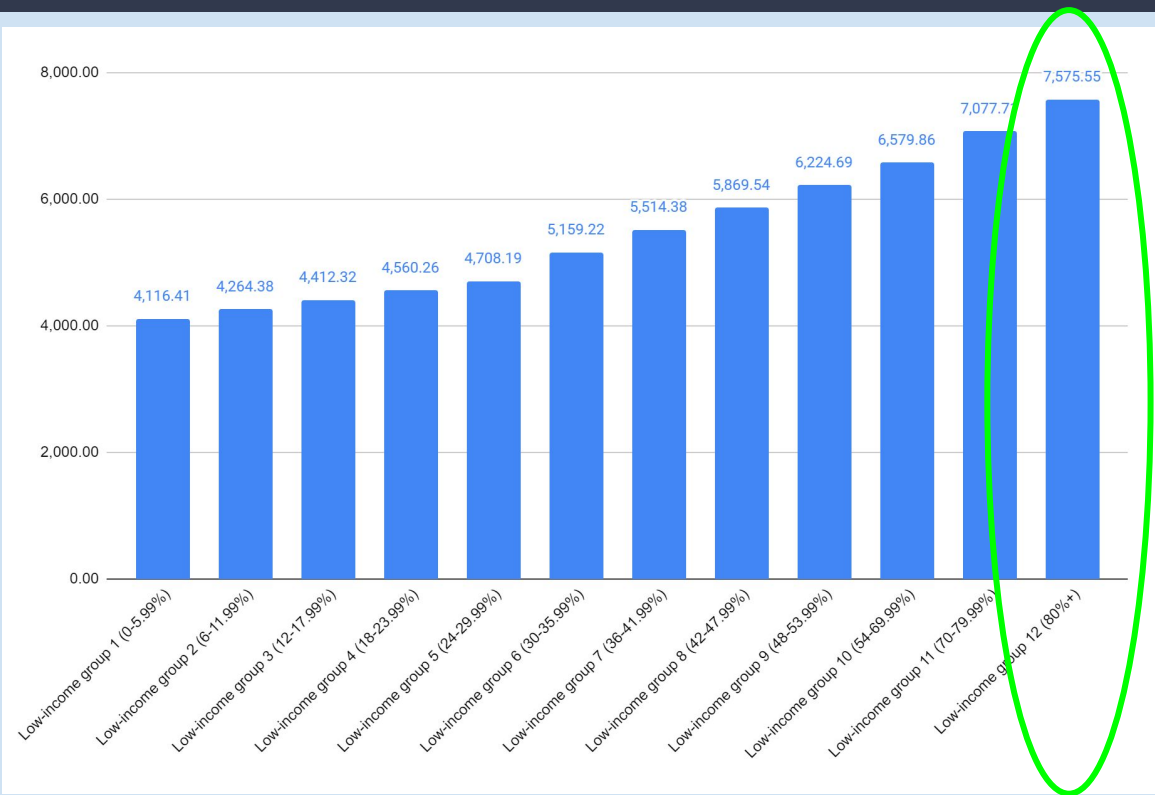


Referred to as the “**foundation budget**” by DESE, **Required Net School Spending** is a dollar set each year by the state, and describes the minimum spending on costs directly related to educating students.

100% of Legally Required Net School Spending is the minimum amount a community must spend on education as codified in Ch70 M.G.L.

Actual Net School Spending includes town/city indirect spending for schools.

Foundation budgets vary based on student needs, including concentrations of low-income students



FRPS is in Low Income Group 12 for SY24, based on a low-income rate of 83.45%.

Funding What We Value: How do we get there?

The Last Piece of the Budget Puzzle - Indirect Costs



- The City is allowed to “charge back” or “write off” against the Local Contribution certain charges and expenses for services they provide for the Fall River Public Schools. At the state level, these “municipal fees” are also referred to as Schedule 19 charges.
- In Fall River, we call these “indirect costs” as outlined in our Shared Cost Agreement* - a statement of partnership between the Fall River Public Schools and the City of Fall River.

**The Shared Cost Agreement was last modified in FY2018.*

The Student Opportunity Act

The Student Opportunity Act (SOA), signed into law in November 2019, **provides a major infusion of new funding to the public schools** in the Commonwealth of Massachusetts.

The SOA was bi-partisan effort involving both policy makers, labor unions, and grass-roots organization to improve educational funding. The new law, Chapter 132 of the Acts of 2019, **updates the foundation budget established in the Education Reform Law of 1993**, which codified the minimum level of education spending required to adequately educate a school district's students.

The SOA **addresses the real costs of educating low-income students, special education students, English language learners, and providing for things like SEL services, and employee health insurance costs**. The SOA also includes increased circuit breaker funding, creates an innovation fund, and requires increased accountability for local districts.

**Originally to be phased in over seven years, but year one was not funded. Now intended to be funded over six years, and FY24 represents year three.*

Student Opportunity Act - Low Income Threshold

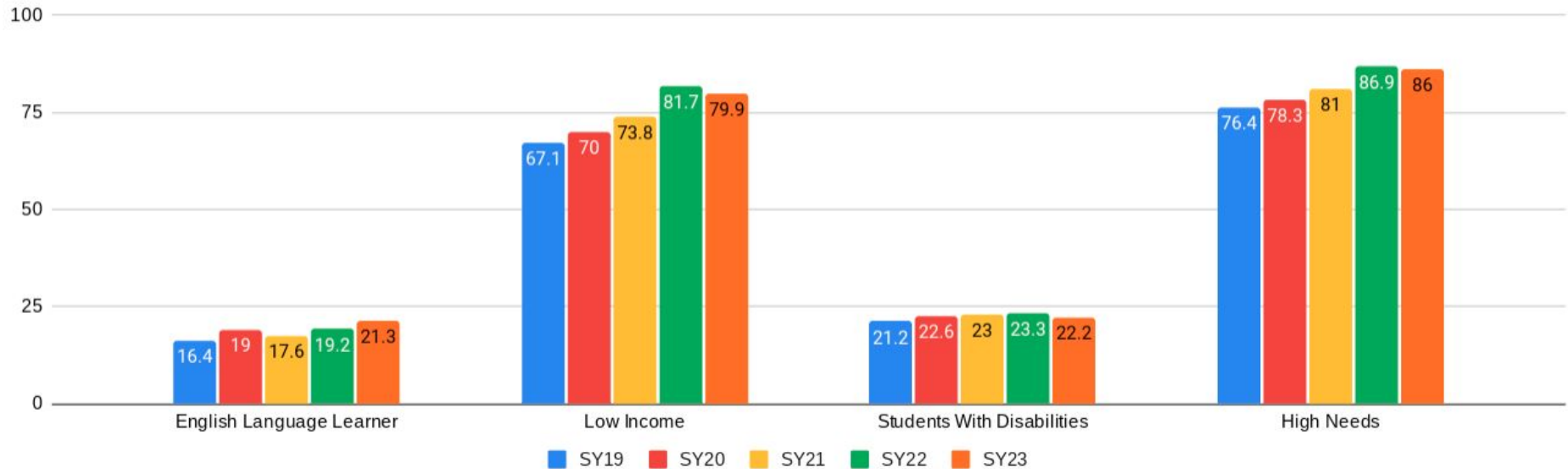
- The Act **restores the definition of low-income enrollment used prior to FY17**, based on 185% of the federal poverty level, up from the 133% threshold used for the economically disadvantaged match from FY17 to FY22
 - Statewide low-income enrollment for FY24 is 421,314, compared to 407,501 for FY23
- Starting in FY23, the Department has designated a student enrolled on October 1st as low income if the student is:
 - **Identified as participating in state public assistance programs**, including the Supplemental Nutrition Assistance Program, Transitional Aid to Families with Dependent Children, MassHealth, and foster care; or
 - **Verified as low income** through a supplemental data collection process; or
 - **Reported as homeless** through the McKinney-Vento Homeless Education Assistance program application

Fall River Student Demographics 2023-2024

	FY23	FY24	Change
<i>All Students</i>	10,268	10,447	179
	% of District		1-Year Change
African-American	10.0%	11.9%	1.9%
Asian	3.3%	3.3%	0.0%
Hispanic	31.1%	31.8%	0.7%
Native American	0.1%	0.2%	0.1%
White	46.2%	44.1%	-2.1%
Multi-Race, Non-Hispanic	9.3%	8.7%	-0.6%
First Language Not English	30.4%	23.4%	-7.0%
English Language Learners	19.2%	21.3%	+2.1%
Low Income	81.7%	79.9%	-1.8%
Students w/ Disabilities	23.3%	22.2%	-1.1%
High Needs	86.9%	86.0%	-0.9%

FRPS 5-Year Shifts

5-Year Trends - Selected Populations



FRPS Student Enrollment



PK

+64 students
from last year



K-5

+2 students
from last year



Grades 6-8

-83 students
from last year



Grades 9-12

+196 students
from last year

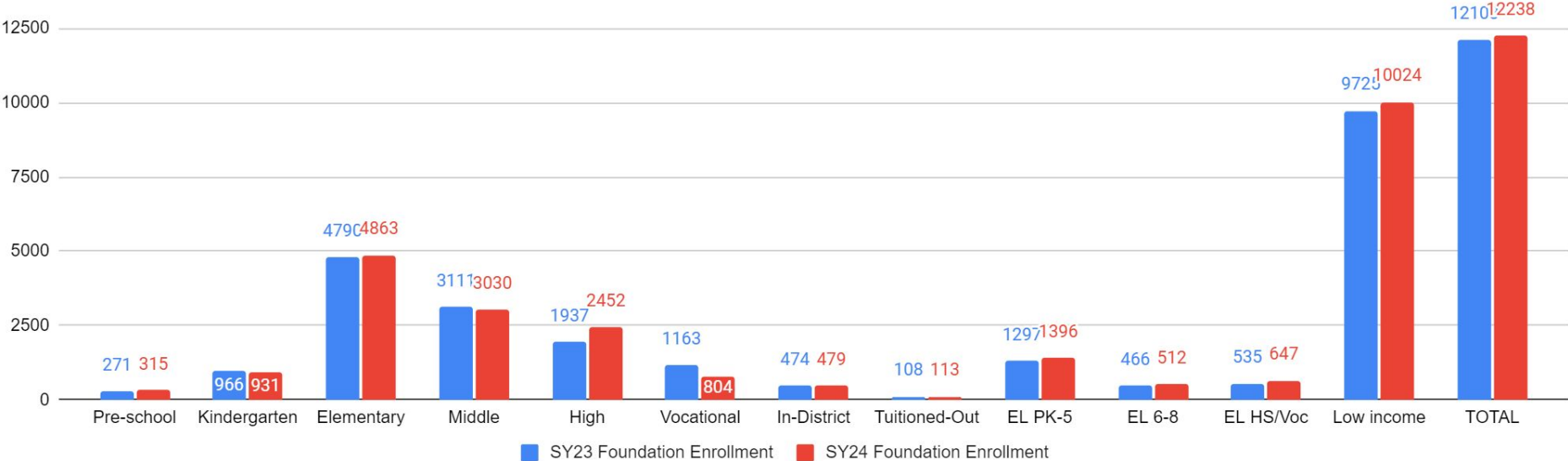


FRPS PK-12

+179 students
from last year

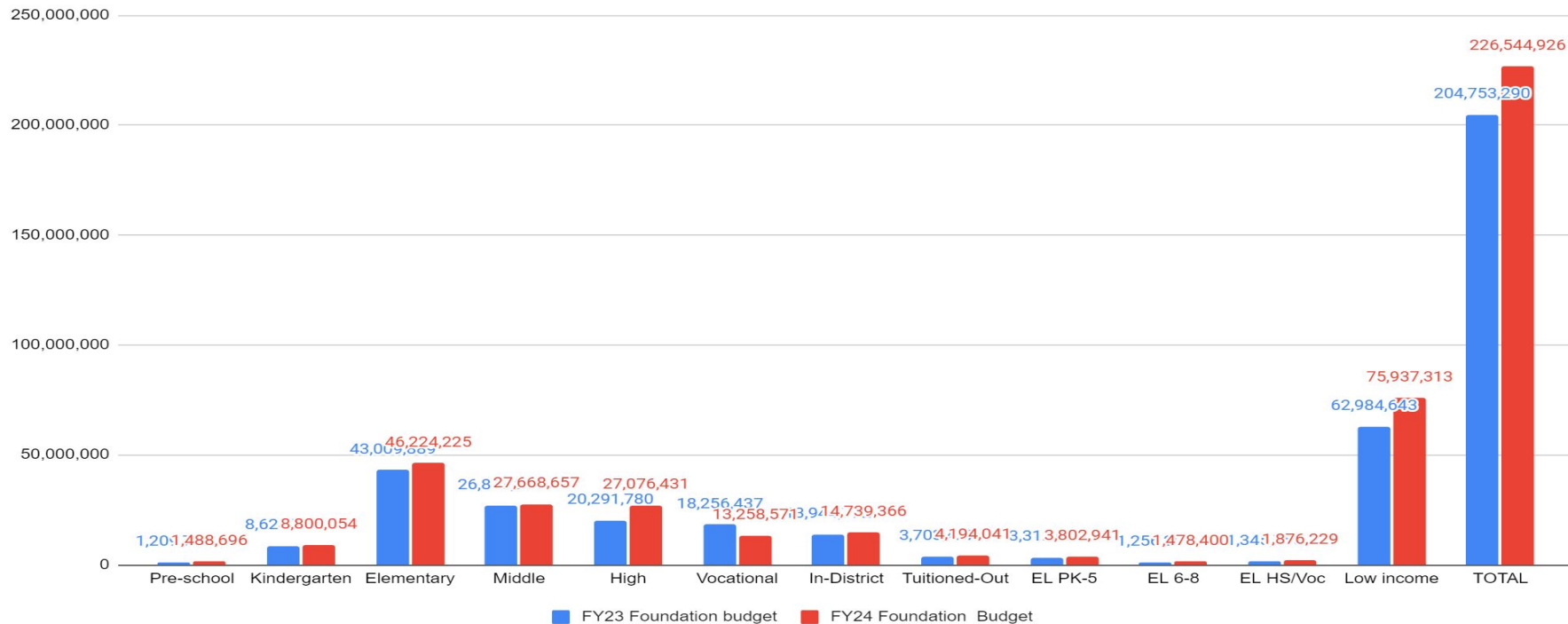
Foundation Budget Enrollment - FY23 to FY24 Comparison

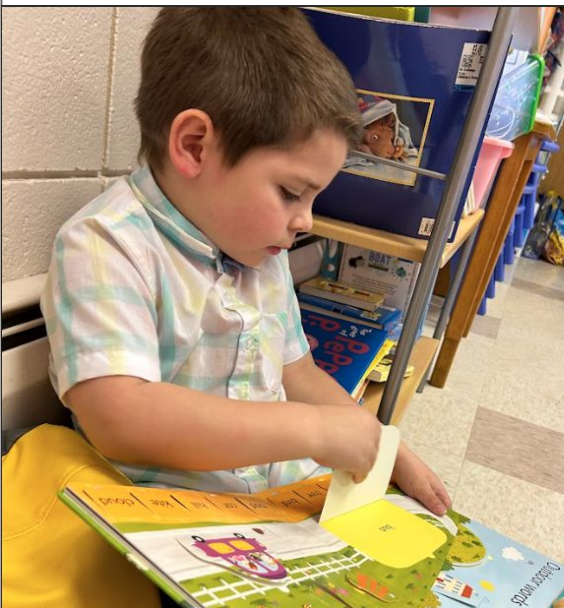
SY23 Foundation Enrollment and SY24 Foundation Enrollment



Foundation Budget Dollars - FY23 to FY24 Comparison

FY23-FY24 Foundation Budget Comparison





FY24 SC Budget Priorities

Budget Priorities: What We Fund Is What We Value

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Human Resources

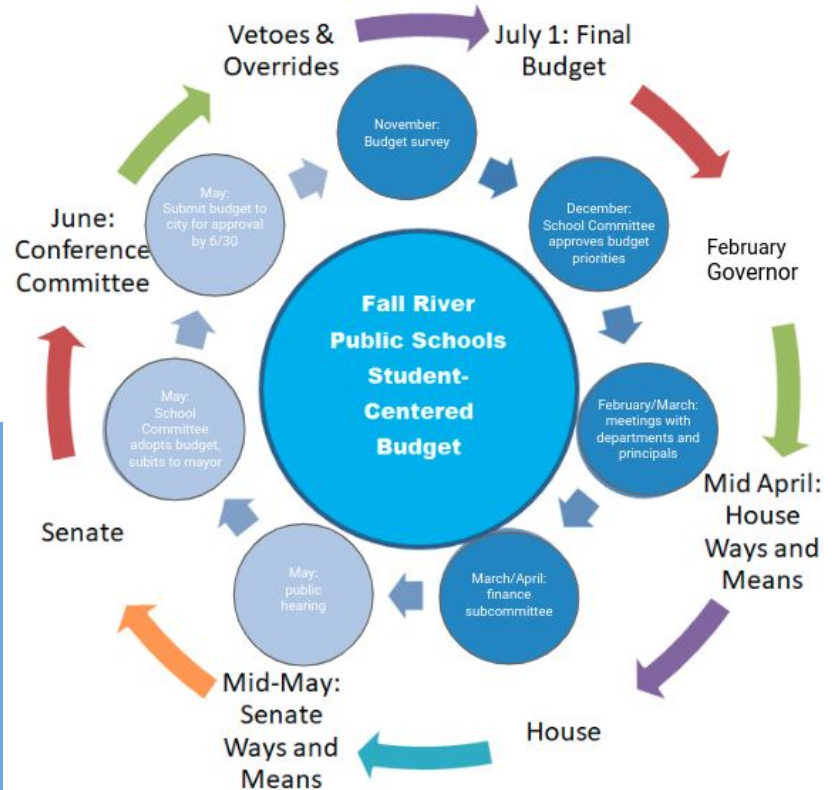
- ★ Recruitment & Retention of staff
- ★ Professional Onboarding
- ★ Staff Attendance/Absence Management



Budget Process – State and Local

Budget Planning Parameters

- Use best practices for each school and cost center.
- Student needs drive decisions.
- Allow Principals to make site based decisions.
- Prioritize areas of investment.



FY24 Revenue (House 1)



Chapter 70 - State Aid - \$188,024,477

- \$19,603,219 increase over final FY23 Chapter 70 aid
- Minimum required increase is \$30 per student

City Contribution - \$38,520,449

- Increase of \$2,188,417 over final FY23 Required City Contribution

Appropriation (Chapter 70 + City Contribution) - \$226,544,926

- Increase of \$21,791,636 over final FY23 Required Net School Spending

\$226,544,926 is 100% Net School Spending Number for FY24.

New Positions for SY24

Operating Budget			
Teachers	70.5	Counselors	2
Paras	48	Dept Head	1
SEL Liaison/Student Support Specialist	12	Nurse	1
Director/Supervisor	7	Tech Staff	1
Custodians	6	Finance Spec	1
Safety Officers	5	Admin Asst	1
Groundskeepers	4	Clerk	1
BCBA/Cluster Coord	3	Athletic Trainer	.5
Vice Principals	2		
Total Operating Budget: 166			

GRANTS	
Teachers	8
Paras	4
Department Head	1
Total Grants: 13	
NUTRITION	
Cafeteria	11
Total Nutrition: 11	

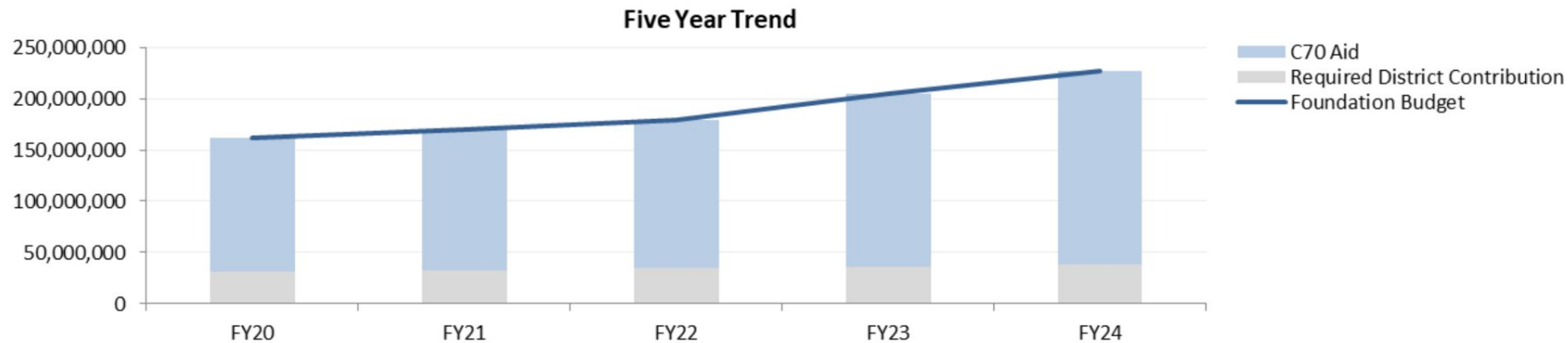


FY23-FY24 Funding Comparison

Based on Enrollment

	FY23	FY24	Change	Pct Chg
Enrollment	12,103	12,238	135	1.12%
Foundation budget	204,753,290	226,544,926	21,791,636	10.64%
Required district contribution	36,332,032	38,520,449	2,188,417	6.02%
Chapter 70 aid	168,421,258	188,024,477	19,603,219	11.64%
Required net school spending (NSS)	204,753,290	226,544,926	21,791,636	10.64%
Target aid share	78.23%	77.01%		
C70 % of foundation	82.26%	83.00%		
Required NSS % of foundation	100.00%	100.00%		

Chapter 70 Funding – Five Year Trend



FY24- Proposed Budget



FY23 Operational Budget	\$204,753,290
FY24 Net School Spending/House 1	\$226,544,926
FY24 Proposed Budget	\$226,544,926
FY24 Delta	\$ 21,791,636
% above net school spending	0.00%

- Site level and department cost centers
- Student needs driven program improvements
- Cost containments and repurposed allocations
- Human capital conversion
- Building capacity to reduce costs

100.00%
Net School Spending

FY24 Concerns - AKA “Budget Busters*”

- Transportation
- Charter School/School Choice expenses
- Out of District Special Ed tuition
- Utilities
- Capital infrastructure
- Health Insurance
- Home Rule Petition?



*Contingencies planned through federal ESSER funds

Federal COVID Relief Funds

ESSER I

Grant Amount: **\$4,730,769**

Grant Dates: 7/1/20-9/30/22

Funds remaining: **\$0**

Funds allocated to date:

- Partial payment of Transportation
- FRPS Technology Capacity
- Proportionate Share for Arch-diocese of Fall River Catholic Schools
- FRPS school COVID Rooms
- Nursing FTE's
- Additional classroom positions, as needed

ESSER II

Grant Amount: **\$17,430,945**

Grant Dates: 7/1/21-9/30/23

Funds remaining: about **\$5,000,000 as of 3/20/23**

Funds allocated to date::

- Pre-K expansion
- Will continue to cover positions funded through ESSER I
- HVAC work district-wide
- Window project at Henry Lord school
- Purchases of promethean boards, chromebooks, digital curriculum, and other technology
- High quality instructional materials
- Funds are set-aside for professional development and other supports for students

Fund use: There are 14 priorities identified in the Federal Law in an effort to build capacity of public school districts and communities to facilitate integrated coordination of school and community-based resources, including but not limited to, social services, mental health and behavioral health resources, districts that receive ESSER II funds must commit a minimum of \$10,000 to student mental health services and supports.

ESSER III

Grant Amount: **\$39,152,523**

Grant Dates: 10/7/21-9/30/24

Funds remaining: **\$34,725,571**

Anticipated allocations:

- Continuation of ESSER I and ESSER II spending
- Capital improvements

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FY24- Proposed Operating Budget



Category	FY 2023	FY 2024	Increase/ (Decrease)	% Change	% of Budget
Salary and Benefits	\$118,342,813	\$133,303,600	\$14,960,787	12.64%	76.65%
Contractual Services	\$28,402,819	\$ 34,823,241	\$6,420,422	22.60%	20.02%
Materials and Supplies	\$ 2,949,463	\$ 3,211,264	\$ 261,801	8.88%	1.85%
Insurance/Other	\$ 2,232,697	\$ 2,582,092	\$ 349,395	15.65%	1.48%
Totals	\$151,927,792	\$173,920,197	\$21,992,405	14.48%	100%

FY23 Budget Recognition



- Kevin Almeida, Chief Financial Officer
- Tracy Curley, Assistant Superintendent of Schools, Chief Academic Officer
- Lori Obenchain, Assistant Superintendent for Special Education
- Ken Pacheco, Chief Operating Officer
- Thomas Coogan, Executive Director of Human Resources
- Scott Cabral, Chief Information Officer
- Debra Cabral, Administrative Assistant to the School Committee
- Paula Soares, Executive Assistant to the Superintendent
- Goretti Furtado, Administrative Assistant of Finance and Operations
- Principals and their site level leadership teams
- All Senior Department Directors
- Keith Michon, FREA President and George Ackley, FRAA President
- School Committee, Fall River Public Schools

**THANK
YOU**

We Fund What We Value

