



Belmont Public Schools Review
Executive Order 393

Education Management Accountability Board Report
June 2000

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I. Introduction

The Massachusetts Education Reform Act (MERA) of 1993 has three major goals: to increase student achievement; to achieve adequate funding for all local and regional school districts over a seven-year period; and to bring equity to local taxation efforts based on a community's ability to pay. In February 1997, the Governor issued Executive Order 393 to evaluate the education reform program that was nearing the end of its fourth year. In FY98, Massachusetts General Laws (M.G.L.) Ch. 70 state aid for education reached \$2.3 billion. With an investment of this magnitude in the Commonwealth's schools, it is critical to "review, investigate, and report on the expenditures of funds by school districts, including regional school districts, consistent with the goals of improving student achievement." To that end, Executive Order 393 established the Education Management Accountability Board (EMAB).

The Secretary of Administration and Finance, serving as chief of staff to the EMAB, selected a team of auditors from the Department of Revenue's (DOR) Division of Local Services (DLS) to conduct the school district reviews. DOR's Director of Accounts is the chief investigator with authority to examine municipal and school department accounts and transactions pursuant to M.G.L. Ch. 44, §§45 and 46A. The reviews are conducted in consultation with the State Auditor and the Commissioner of Education.

The Belmont Public Schools (BPS) is the twenty-second school district reviewed under Executive Order 393. The audit team began the review of BPS in October 1999, and completed it in January 2000. As part of this review, the audit team conducted a confidential survey of employees of the school district and included the results in this report. School officials cooperated fully with the audit team.

The Executive Summary includes some of the more significant observations and findings of the review of BPS's operations. When possible, the audit team has identified and presented best practices, which may be adapted by other school districts. The report discusses all results, best practices and deficiencies, if any, in greater detail in the "General Conditions and Findings" section.

II. Executive Summary

SUMMARY

Belmont has made consistent progress in achieving some key education reform goals. An emphasis on implementing school management related provisions of education reform law has created a management system incorporating both solid planning and accountability. BPS is beginning a second five-year strategic plan and additionally utilizes annual Education Improvement Plans (EIPs) to guide the district. Teachers are accountable through a strong four-year evaluation cycle that has been

successful in removing underperforming teachers. Principal and administrator salary increases are based on a performance evaluation system.

BPS has a student population of about 3,550 and a budget \$21.8 million as of FY98. Required and actual spending as a percent of foundation budget has been greater than 100 percent since FY94. From FY93 to FY98, FTE teachers increased by 28.0. In FY95, Belmont funded a \$20.7 million capital project that rebuilt the middle school, which had been destroyed by fire, and renovated two elementary schools. Belmont High School was accredited by NEASC in 1992 and that status was continued after a five-year status report in 1997.

Student learning time is a concern at the high school. To meet DOE guidelines calling for 990 hours, students must take six courses, in addition to participation in certain activities that do not necessarily qualify under DOE guidelines. Although exceeding the foundation budget target in total, spending was less than target in four key areas from FY94 to FY98, except for FY96 books and equipment. Professional development spending was less than foundation budget, but has been greater than the minimum legal spending requirement for FY95, FY96, and FY98. The business manager, not the school committee, has been approving payrolls. By law, the school committee retains fiscal oversight responsibility over the payroll.

THE FOUNDATION BUDGET

- BPS actual net school spending has exceeded the foundation budget target as determined by DOE for FY94 through FY98. In FY98, the district's local and state percentages of actual net school spending were 91.6 percent and 8.4 percent respectively. FY98 salaries accounted for 82.8 percent of the school operating budget including transportation. [See Section 5 and Appendix A-1]
- FY98 budgeted SPED Tuition accounted for \$937,600 or 24.9 percent of non-salary budget areas including transportation. SPED expenses increased \$881,624 or 32.2 percent from FY93 to FY98. [See Section 22 and Appendix A-1]
- The foundation budget does not mandate spending in any specific category. To encourage appropriate levels of spending, M.G.L. Ch.70 §9 requires that a school district report to the Commissioner of Education when it has failed to meet foundation budget levels for professional development, books and equipment, expanded program, and extraordinary maintenance. BPS did not meet these levels for any of the categories in any of the fiscal years shown except for books and equipment in FY96. The district did not file a report stating its reasons for not meeting these levels as required by law nor did DOE direct it to do so. [See Section 7]

STUDENT ACHIEVEMENT

- BPS test scores are above state averages. MCAS scores show that BPS scored above the state average scaled scores for grades 4, 8, and 10 for 1998 and 1999

in all areas. MEAP, the state's educational testing program from 1988 to 1996, showed that BPS 1996 MEAP scores were above the state average in all areas for all grades. [See Section 16, Appendices C and D]

GOVERNANCE AND MANAGEMENT POWERS

- BPS is in year one of their second five-year strategic plan that guides the district. The development of a strategic plan was begun by the Superintendent prior to education reform, and the first five-year plan was approved by the school committee in 1994. Yearly goals and objectives are stated in the district annual Education Improvement Plan (EIP) that is based on the school improvement plans and the district's strategic plan. [See Section 17]
- A new evaluation system was negotiated into the teacher's contract beginning in 1998. The new comprehensive four-year system was approved by DOE and relies greatly on documentation of the entire review process. Since education reform began BPS has used the evaluation process, old and new, to remove 70 teachers, 47 non-professional status and 23 professional status.
- Administrator's contracts are performance based, and evaluations dictate salary enhancement. The Superintendent gives dollar figure raises, as opposed to percentage raises, within the guidelines set by the school committee based on an administrator's yearly performance.

STUDENT/FTE TEACHER STAFFING

- Between FY93 and FY98, the total number of FTE teachers increased by 28 or 14.3 percent, from 196 to 224. During this same time, the all students/all FTE teacher ratio remained at 15.9:1. This ratio is higher than the FY98 state average of 14.2:1. The FY98 all student/all non-SPED FTE teacher ratio of 17.8:1 is below the state average of 18.1:1. [See Section 8]

TEACHER COMPENSATION

- Between FY93 and FY98, expenditures for salaries rose \$3.0 million or 22.8 percent. Total teaching salaries rose \$2.3 million or 25.3 percent, reflecting additional spending for new staff as well as pay raises in teachers' contracts. Union contracted annual raises plus step increases for teachers have increased by 47.2 percent from 1993 to 1998. The district FY98 average teacher salary as reported to DOE of \$50,701 was \$6,650 or 15.1 percent higher than the state average of \$44,051. [See Section 9]

TECHNOLOGY

- BPS submitted a five-year technology plan to DOE in June 1996 covering the years FY97 to FY01. DOE approved the plan on August 6, 1996. The plan

projected that full implementation would cost \$1.9 million over five years. As of FY98, the second year of the five-year plan, \$253,431 or 13.3 percent has been expended. [See Section 14]

MAINTENANCE AND CAPITAL IMPROVEMENT

- The audit team found all of schools visited to be very clean and extremely well maintained. BPS has two processes for maintenance. The high school and middle school are cleaned and maintained by a contractor. Custodians employed by BPS maintain the four elementary schools. The town has a Capital Budget Committee, which submits an annual report to the town meeting. The report covers a five-year period, starting with the current year. The town funded a new middle school in 1995 and renovations to two elementary schools. [See Section 21]

STUDENT LEARNING TIME

- Elementary and middle school students receive the minimum 900 hours required by DOE. In order to reach the minimum required 990 hours at the high school, students must enroll in six courses and participate in other activities including community service, directed studies, and clubs. These activities are not considered allowable by DOE guidelines. [See Section 23]

DISTRICT ISSUES

- In verifying the accuracy of enrollment numbers, the audit team noted errors in the method in which BPS reported pre-kindergarten and kindergarten enrollment. Specifically, our review of foundation enrollment reports revealed both overstated and understated student populations. In dollar terms, these enrollment errors were determined to be immaterial. [See Section 1]

BEST PRACTICES

- BPS utilizes an administratively developed plan to address academic achievement objectives. The Education Improvement Plan (EIP) serves as a bridge between the districts strategic plan and the individual school improvement plans. District EIPs typically can include 25 to 50 objectives to be achieved during the school year. Each objective is clearly stated and tied to an identifiable goal from the strategic plan. Objectives are assigned to a specific school/program and have an assigned point person(s), an action plan, and a timeline for completion. In June, at the end of the school year, a similar document is prepared, however the timeline column has been replaced by a result column that states the success, progress, or failure of the objective. [See Section 17]

- In 1998, BPS in cooperation with the Belmont teachers' association negotiated a teacher's contract with strong management rights in the areas of teacher performance and accountability. The collectively bargaining process produced a new four-year teacher evaluation system and a comprehensive professional development plan. The professional development plan offers many courses and is widely utilized. The evaluation system has been used to eliminate underperforming teachers and strengthen teacher development. This was the first contract negotiated after teachers' strike of 1995. [See Sections 17 & 25]

Auditee's Response

The audit team held an exit conference with the Superintendent and the Assistant Superintendent on April 28, 2000. The team invited BPS to suggest specific technical corrections and make a formal written response. Comments were received, changes were made as a result of these comments, and a revised report was provided to the Superintendent. The Superintendent provided further comments which are contained in Appendix G.

Review Scope

In preparation for the school district reviews, the audit team held meetings with officials from DOE, the State Auditor's Office, and other statewide organizations such as the Massachusetts Taxpayers Foundation, the Massachusetts Municipal Association, and the Massachusetts Association of School Superintendents. The audit team also read published reports on educational and financial issues to prepare for the school district reviews.

DOE provided data including the end-of-year reports, foundation budgets, and statewide comparative data. DOR's Division of Local Services Municipal Data Bank provided demographic information, community profiles, and overall state aid data. While on site, the audit team interviewed officials including, but not limited to, chairman of the board of selectmen, the school committee chairman, the school Superintendent, the Assistant Superintendent, the Director of Computer Services, curriculum directors, and principals. Documents reviewed included both vendor and personnel contracts, invoices, payroll data, statistics on students and teachers as well as test results and reports submitted to DOE.

In keeping with the goals set out by the EMAB, the school district review was designed to determine whether or not basic financial goals related to education reform have been met. The audit team gathered data related to performance such as test scores, student to teacher ratios, and class sizes to show results and operational trends. However, this report does not intend to present a definitive opinion regarding the quality of education in BPS, or its successes or failures in meeting particular education reform goals. Rather, it is intended to present a relevant summary of data to the EMAB for evaluation and comparison purposes.

The focus of this review was on operational issues. It did not encompass all of the tests that are normally part of a year-end financial audit such as: review of internal controls; cash reconciliation of accounts; testing compliance with purchasing and expenditure laws and regulations; and generally accepted accounting practices. The audit team tested financial transactions on a limited basis only. The audit team also excluded federal grants, revolving accounts, and student activity accounts. The audit team did not test statistical data relating to test scores and other measures of achievement. This report is intended for the information and use of EMAB and BPS. However, this report is a matter of public record and its distribution is not limited.

III. General Conditions and Findings

1. Belmont Overview

DOE classifies the town of Belmont as an economically developed suburb. Its 1996 population was 24,004, down 8.0 percent from 1980 and down 15.1 percent from 1970. It is located approximately 7 miles northwest of Boston. The town is governed by a representative town meeting and is administered by a three-member board of selectmen with a town administrator. McLean Hospital, Belmont's largest employer, employs 1,515 people. The taxable value of the town's largest taxpayer, Hill Estates, was valued in FY00 at \$47.9 million or 1.58 percent of the town's total taxable value.

Like many Massachusetts school districts, Belmont faced budgetary pressures in the early 1990s as a result of an economic recession and the associated decline in municipal state aid for education and in financial contributions to schools. In FY92 the school committee budget was reduced by .5 percent from the FY91 budget. Since FY93 the school committee budget has increased each year.

Charts 1-1 and 1-2 show some key demographic and economic statistics for Belmont.

*Chart 1-1***Town of Belmont
Demographic Data**

1996 Population	24,004
FY99 Residential Tax Rate	\$13.76
FY99 Average Single Family Tax	\$5,234
FY99 Avg. Assessed Value Per Single Family	\$328,207
FY99 Tax Levy	\$36,470,620
FY99 Levy Limit	\$37,158,958
FY99 Levy Ceiling	\$66,262,028
FY99 State Aid	\$6,569,153
FY99 State Aid as % of Revenue	10.8%
1989 Per Capita Income	\$26,793
1996 Average Unemployment Rate	2.3%

Note: Data provided by DLS

As of our audit date, the district has one high school (grades 9-12), one middle school (grades 5-8), and four elementary schools (three grades K-4, and one grades pre-K-4). The town belongs to the Minuteman Vocational Technical school district for grades 9-12.

As of our audit date, the Superintendent has been in his position for 12 years, the Assistant Superintendent for seven years, and the director of finance for two years.

The organization chart shows the Superintendent answers directly to the school committee, while holding direct supervision over four main subdivisions of the school system. The four subdivisions and their responsibilities are: the Assistant Superintendent for curriculum and instruction, who supervises all academic and athletic coordinators and a curriculum review committee; the director of student services oversees the special education program; principals provide educational leadership at each school building; and the director of finance supervises all aspects of facilities, maintenance, busing and cafeterias, and the business office staff.

BPS teachers went on strike for nine days in January of 1995. The teacher's previous contract expired in June 1994. Teachers returned in September under "work to rule" conditions, until a nine-day strike occurred in January 1995. BPS remained open during the strike with administrators and volunteers serving as substitute teachers. The strike was settled with both sides agreeing on two contracts. The first was a single year contract for the remainder of 1994/95 school year without a salary increase. The ensuing contract was a three-year deal. BPS lost one day of school to the strike and BPS teachers lost six days of salary.

In July 1995 a fire at the Chenery Middle School closed the building for two years. For school years 1995/96 and 1996/97 middle school students were educated at Belmont High School and with modular classrooms. The new Chenery Middle School opened in September 1997 and included 5th, 6th, 7th, and 8th grades where the old school only had 6th, 7th, and 8th grade students.

Transportation is provided for all elementary school (K-6) students who live 2.0 miles or more from their elementary school with provision for safety rides for those under 1.0 miles. Free rides are also provided for middle school students that live 1.5 miles or more and high school students that live 2.0 miles or more. Middle school students that live less than 1.5 miles from the middle school and high school students that live less than 2.0 miles from the high school can pay \$275 per semester.

BPS's high school graduating class of 1998 indicated that 89.8 percent intended to go on to a two or four year college, a rate higher than the 71.8 percent state average. The percent of graduates planning to go to work was 1.9 percent, a rate lower than the state average of 16.2 percent. In 1997, the high school dropout rate was 0.5 percent, less than the state average of 3.4 percent.

Chart 1-2

Belmont Public Schools Demographic Data 1998/99

	BPS	State Average
Enrollment: Race / Ethnicity		
White	87.1%	77.1%
Minority	12.9%	23.0%
Limited English Proficiency	1.5%	4.7%
Special Education	15.1%	16.6%
Percentage Attending Private School -1998	10.9%	10.0%
High School Drop-Out Rate - 1997	0.8%	3.4%
Plan of Graduates - Class of '98:		
4 Year College	85.4%	53.2%
2 Year College	4.4%	18.6%
2 or 4 Year College	89.8%	71.8%
Work	1.9%	16.2%

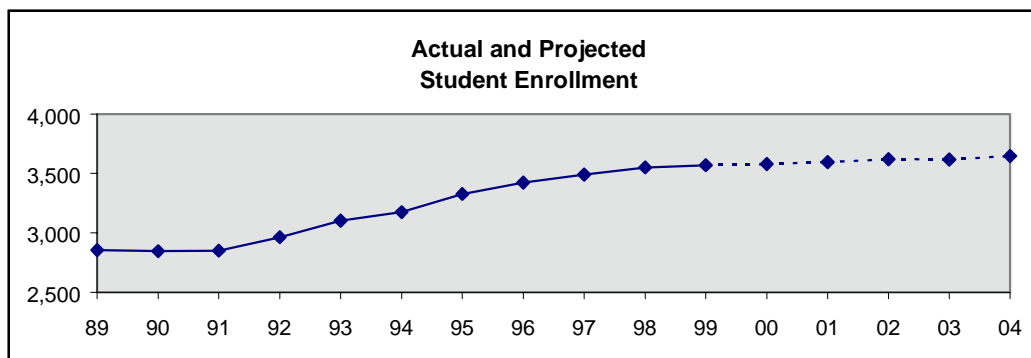
Note: Data provided by DOE.

Chart 1-3 illustrates BPS enrollment trend from October 1988, the 1988/89 school year, to October 2003, the 2003/04 school year. Enrollments are projected for the

district by the New England School Development Council (NESDEC) and are shown from October 1999 through October 2003. Enrollments are as of October 1, and include tuitioned-in and tuitioned-out students.

Chart 1-3

**Belmont Public Schools
Actual and Projected Student Enrollment
School Years 1988/89 to 2003/04**



Note: Enrollment as of October 1st. Data obtained from BPS.

A solid line represents actual enrollment; a dotted line represents projected enrollment

As shown in *Chart 1-3a*, enrollment has increased from 2,875 in October of 1988/89 school year to 3,551 in October of 1997/98 school year. Total BPS enrollment increased by 23.5 percent during this time period, a higher rate of increase than the state average of 15.1 percent. The chart shows a total enrollment increase in 12 of the 15 years represented in the chart. Elementary and middle school enrollments increased by 33.8 percent and 36.5 percent respectively, from 1988/89 to 1997/98, higher rates of increase than the state average of 22.1 percent and 21.8 percent. High school enrollment also increased by a higher percentage than the state average (4.6 percent to 2.8 percent). Enrollment projections show generally increasing enrollments at the middle and high school levels.

Chart 1-3a

Belmont Public Schools
Actual and Projected Student Enrollment

School Year	Elementary School		Middle School	High School	Ungraded/ Tuitioned	Total Enrollment
	Pre K & K	1 - 5	6 - 8	9 - 12	Out	
88-89	261	1,084	598	894	38	2,875
89-90	298	1,088	600	839	41	2,866
90-91	284	1,162	604	768	40	2,858
91-92	266	1,276	636	761	27	2,966
92-93	340	1,327	645	767	28	3,107
93-94	299	1,382	696	765	37	3,179
94-95	328	1,410	741	818	35	3,332
95-96	305	1,405	802	881	44	3,437
96-97	306	1,438	816	894	41	3,495
97-98	304	1,450	816	935	46	3,551
98-99	301	1,440	809	965	53	3,568
99-00	276	1,445	823	981	55	3,580
00-01	268	1,444	854	975	55	3,596
01-02	270	1,422	861	1,013	55	3,621
02-03	271	1,423	878	991	55	3,618
03-04	270	1,427	869	1,027	55	3,648
BPS 89-98						
% Change	16.5%	33.8%	36.5%	4.6%	-	23.5%
State 89-98						
% Change	20.7%	22.1%	21.8%	2.8%	-	15.1%
BPS 99-04						
% Change	-10.3%	-0.9%	7.4%	6.4%	-	2.2%

Note: Data obtained from BPS

Chart 1-4 illustrates the elementary, middle and high school enrollments as a percentage of the total enrollment.

Chart 1-4

Belmont Public Schools
Distribution of Enrollment by Type of School

School Year	Elementary School		Middle School	High School	Ungraded	Total Enrollment
	Pre K & K	1 - 5	6 - 8	9 - 12		
88-89	9.1%	37.7%	20.8%	31.1%	1.3%	100.0%
89-90	10.4%	38.0%	20.9%	29.3%	1.4%	100.0%
90-91	9.9%	40.7%	21.1%	26.9%	1.4%	100.0%
91-92	9.0%	43.0%	21.4%	25.7%	0.9%	100.0%
92-93	10.9%	42.7%	20.8%	24.7%	0.9%	100.0%
93-94	9.4%	43.5%	21.9%	24.1%	1.2%	100.0%
94-95	9.8%	42.3%	22.2%	24.5%	1.1%	100.0%
95-96	8.9%	40.9%	23.3%	25.6%	1.3%	100.0%
96-97	8.8%	41.1%	23.3%	25.6%	1.2%	100.0%
97-98	8.6%	40.8%	23.0%	26.3%	1.3%	100.0%
98-99	8.4%	40.4%	22.7%	27.0%	1.5%	100.0%
99-00	7.7%	40.4%	23.0%	27.4%	1.5%	100.0%
00-01	7.5%	40.2%	23.7%	27.1%	1.5%	100.0%
01-02	7.5%	39.3%	23.8%	28.0%	1.5%	100.0%
02-03	7.5%	39.3%	24.3%	27.4%	1.5%	100.0%
03-04	7.4%	39.1%	23.8%	28.2%	1.5%	100.0%
Percentage Point						
Chg. '89-98	-0.5	3.1	2.2	-4.8	0.0	0.0
Percentage Point						
Chg. '99-'04	-1.0	-1.2	1.1	1.1	0.0	0.0

Note: Data obtained from BPS. Percentages may not calculate due to rounding.

In verifying the accuracy of the enrollment numbers, the audit team noted errors in the report filed with DOE for the purpose of reporting foundation enrollment. Specifically, our review of foundation enrollment reports and supporting documents revealed both overstated and understated student populations at the kindergarten and pre-kindergarten levels.

In dollar terms, the errors were determined to be immaterial. However, errors of this type can be significant because they carry forward per the education aid formula as minimum aid (based on foundation enrollment) becomes a factor in the following year's base aid for an above-foundation community. The audit team discussed the nature of the past reporting errors with the director of finance and recommends that the district review annual DOE instructions for the report.

2. School Finances

Overall, BPS has benefited from additional funds available due to education reform. State aid increased by \$780,000 and required local contribution by \$1.7 million from FY94 to FY98. This combination of aid allowed the district to hire more teachers, fund additional SPED costs, increase salaries, and spend for new academic initiatives.

School district funding and financial reporting requirements are generally complex and become especially complicated in the context of education reform. A district annually determines how much money it will spend on education. DOE considers only certain expenditures and funding when determining whether or not a district meets education reform requirements.

This audit examines school funding primarily from three perspectives: the school committee budget, net school spending, and the foundation budget.

The audit team examined the school committee budget in some detail as a matter of practice because it reflects basic financial and educational decisions, provides an overview of financial operations, and indicates how the community expects to meet the goals and objectives of education reform.

Net school spending, the sum of the required minimum contribution from local revenues plus state chapter 70 education aid, is a figure issued annually by DOE that must be met by school districts under education reform.

The foundation budget is a school spending target under education reform which the school district should meet. Calculated on the basis of pupil characteristics and community demographics, it is designed to ensure that a minimum level of educational resources is available per student in each school district. Under education reform, all school districts are expected to meet their foundation budget targets by the year 2000.

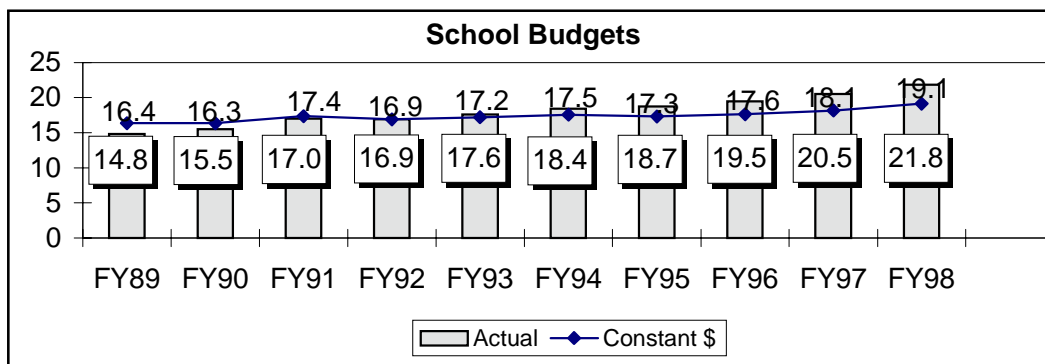
3. School Committee Budget Trend

Chart 3-1 illustrates the trend of the school committee budget from FY89 through FY98. The total school committee budget increased by \$2.8 million or 18.9 percent between FY89 and FY93. With education reform aid, the budget increased \$4.2 million, or 23.9 percent between FY93 and FY98, from \$17.6 million to \$21.8 million. The increase in chapter 70 state aid during this same time was \$1.2 million. Fringe benefits for active employees have been included in the school budget since FY91. Prior to FY91 these fringe benefits were included in the town budget. Health insurance for retirees has been included in the school budget since FY97 and also had been previously included in the town budget. Of the budgets shown, only the FY92 budget showed a decrease from the previous fiscal year.

This chart also shows the school committee budget as adjusted from FY89 through FY98 in constant dollars where FY92 is set at 100. The chart illustrates how the school committee budget fared with respect to inflation over time. From FY89 to FY98, the school committee budget as adjusted increased from \$16.4 million to \$19.1 million, a 16.5 percent increase in constant dollars. From FY93 to FY98 it increased 11.0 percent or \$1.9 million in constant dollars, from \$17.2 million to \$19.1 million. In constant dollars, BPS experienced a net budget decrease in FY92.

Chart 3-1

Belmont Public Schools
School Budgets in Actual and Constant Dollars
FY89 - FY98



Note: Data obtained from BPS and the town of Belmont.

BPS end-of-year reports indicate that no funds were expended nor were received in Equal Education Opportunity (EEO) grants and that \$293,900 was expended in FY93 Per Pupil Aid. The purpose of EEO grants was to raise per pupil direct service expenditures in Massachusetts cities and towns in which these expenditures were below 85 percent of the state average. FY93 Per Pupil Aid funds were exclusively for educational purposes and must have been used to implement new initiatives, reduce class size and make management changes or other improvements in the educational program.

4. Total School District Expenditures

Total school district expenditures include expenditures by the school committee and by the town for school purpose as reported in the DOE end-of-year report. Total school district expenditures increased between FY92 and FY93 by 856,000 or 4.3 percent. Expenditures increased between FY93 and FY98 by \$6.6 million or 31.9 percent. Expenditures paid by the town for school purposes were \$2.7 million in FY92 and increased to \$5.2 million in FY98 primarily due to employee benefits, purchase of land and buildings and long-term debt service and retirement. In FY98, the major components of town spending were \$3.2 million for long-term debt service and retirement associated with school construction, \$715,000 for tuition to other

districts, \$479,000 for retirement and \$439,000 for purchase of land and buildings. *Chart 4-1* illustrates BPS's total school district expenditures for FY92 through FY98.

Chart 4-1

**Belmont Public Schools
Total School District Expenditures
(in millions of dollars)**

	FY92	FY93	FY94	FY95	FY96	FY97	FY98
School Committee	\$17.2	\$17.6	\$18.0	\$18.7	\$20.6	\$20.9	\$22.1
Town	\$2.7	\$3.2	\$3.2	\$3.6	\$3.6	\$5.6	\$5.2
Total	\$19.9	\$20.8	\$21.2	\$22.3	\$24.2	\$26.5	\$27.4

Note: Data obtained from BPS. Numbers may not add due to rounding.

Chart 4-2 shows the FY94 to FY98 trend in net school spending per student. It indicates that actual net school spending per student has increased from \$5,806 in FY94 to \$6,298 in FY98, or 8.5 percent. The inflation adjusted figures decreased slightly from \$5,535 in FY94 to \$5,524 in FY98, or -0.2 percent in 1992 dollars.

Chart 4-2

**Belmont Public Schools
Net School Spending Per Student
Actual and Constant (1992=100) Dollars**

	FY94	FY95	FY96	FY97	FY98	FY94-FY98 Change
Expenditures / Student in Actual \$	\$5,806	\$5,967	\$6,059	\$6,013	\$6,298	8.5%
Expenditures / Student in 1992 \$	\$5,535	\$5,520	\$5,483	\$5,321	\$5,524	-0.2%

Note: Data obtained from BPS

5. Net School Spending Requirements

Pursuant to the education reform law, DOE develops annual spending requirements and budget targets for each school district. The requirements are based on a formula which is used to set specific minimum spending requirements and in

combination with other factors is also used to set foundation budget targets as well as determining the amount of state aid for each district.

Each school district must meet a net school spending requirement. Expenditures that count towards a district's net school spending, generally include all education related expenditures paid for with state aid under Chapter 70 and municipal appropriations used for that purpose. Excluded from the net school spending definition are expenditures for school transportation, school lunch, school construction and certain capital expenditures. Expenditures from federal funds and from school revolving accounts are also excluded.

As indicated in *Chart 5-1*, the recommended foundation budget target, that is the ultimate spending goal for the district, increased from \$14.6 million in FY94 to \$18.2 million in FY98, a 24.8 percent increase. During this same period, required net school spending increased by 13.6 percent, from \$18.1 in FY94 to \$20.6 million in FY98. Both the required and actual net school spending amounts have been consistently above the recommended foundation budget target.

Chart 5-1

**Belmont Public Schools
Foundation Budget and Net School Spending (NSS)
(in millions of dollars)**

	FY94	FY95	FY96	FY97	FY98
Foundation Budget Target	\$14.6	\$15.5	\$17.2	\$17.7	\$18.2
Required NSS as % of Foundation	124.4%	123.4%	107.6%	112.0%	113.2%
Required Net School Spending	\$18.1	\$19.1	\$18.5	\$19.8	\$20.6
Actual Net School Spending	\$18.4	\$19.8	\$20.7	\$20.9	\$22.2
Variance \$	\$0.2	\$0.7	\$2.2	\$1.1	\$1.6
Variance %	1.4%	3.6%	11.9%	5.4%	7.8%
Actual NSS as % of Foundation	126.1%	127.8%	120.4%	118.0%	122.1%

Note: Data obtained from DOE and BPS. Percentages may not calculate due to rounding.

Chart 5-2 indicates that state aid, as a percent of actual net school spending, increased from 5.9 percent in FY94 to 8.4 percent in FY98, while the local share decreased from 94.1 percent in FY94 to 91.6 percent in FY98. The chart also indicates that from FY94 to FY98, the actual local contribution exceeded the required local contribution by as low as 1.5 percent and by as high as 12.9 percent.

Chart 5-2

**Belmont Public Schools
Net School Spending
(in millions of dollars)**

	FY94	FY95	FY96	FY97	FY98
Required Local Contribution	\$17.0	\$17.9	\$17.1	\$18.2	\$18.7
Actual Local Contribution	\$17.3	\$18.6	\$19.3	\$19.3	\$20.3
Variance \$	\$0.2	\$0.7	\$2.2	\$1.1	\$1.6
Variance %	1.5%	3.8%	12.9%	5.9%	8.6%
Required Net School Spending	\$18.1	\$19.1	\$18.5	\$19.8	\$20.6
Actual Net School Spending	\$18.4	\$19.8	\$20.7	\$20.9	\$22.2
Local Share \$	\$17.3	\$18.6	\$19.3	\$19.3	\$20.3
State Aid \$	\$1.1	\$1.2	\$1.4	\$1.6	\$1.9
Local Share %	94.1%	94.1%	93.2%	92.2%	91.6%
State Aid %	5.9%	5.9%	6.8%	7.8%	8.4%

Note: Data obtained from DOE and BPS. Percentages may not calculate due to rounding.

6. School Committee Program Budget

Within the context of education reform and improving student achievement, the audit team tries to establish what a school district budgets and spends on academic courses such as English and Science versus other subjects or programs. Program budgets are generally intended to show the total financial resources for a particular program or activity. Well-developed program budgets include goal statements, planned actions and expected outcomes along with the total amount of resources required to achieve the objectives. In the school environment, a program budget for mathematics, for example, would show salaries for mathematics teachers and related costs such as supplies, textbooks, etc. It would also indicate the expected outcomes for the budget year.

BPS produces a budget with line items, which follow DOE's spending categories (1000 series for administration, 2000 series for instruction, etc.). Salaries and expenses are further detailed within these major classifications. *Chart 6-1* summarizes the school committee budget for FY93, FY95, and FY98.

According to *Chart 6-1*, the highest increase from FY93 to FY98 was the budgeted amount for programs with other districts which increased by \$327,000 or 53.6 percent. DOE defines these expenses as transfers of payments to other school districts or to non-public schools for services provided to students residing in the sending city or town. The budgeted amount for instruction increased from FY93 to FY98 by \$3.2 million or 25.8 percent. According to DOE guidelines, this amount includes expenses for instructional activities involving the teaching of students, supervising of staff, and developing and utilizing curriculum materials and related services. The budgeted amount for other school services increased by \$56,000 or 7.9 percent from FY93 to FY98. DOE guidelines define these expenses as services other than instructional provided for students.

Chart 6-1

**Belmont Public Schools
School Committee Program Budget
(in thousands of dollars)**

	FY93	FY95	FY98	FY93 - FY98		
				\$ Diff	% Diff	% of Total
Administration	\$555	\$570	\$618	\$63	11.4%	1.8%
Instruction	\$12,480	\$13,477	\$15,701	\$3,221	25.8%	90.6%
Other School Services	\$706	\$645	\$762	\$56	7.9%	1.6%
Operation and Maintenance	\$1,979	\$1,881	\$1,896	(\$83)	-4.2%	-2.3%
Acquisition of Equipment	\$46	\$0	\$19	(\$27)	-58.7%	-0.8%
Programs with Other Districts	\$610	\$825	\$937	\$327	53.6%	9.2%
Total	\$16,376	\$17,398	\$19,933	\$3,557	21.7%	100.0%

Note: Data obtained from BPS. Totals may not add due to rounding. Fringe benefits not included.

Appendix A1 further details the data shown in *Chart 6-1* by line item. This appendix, unlike the chart, includes fringe benefits.

Chart 6-1a shows the same program budget data on a percentage distribution basis to illustrate how particular budget items have changed since FY93 in certain areas.

Chart 6-1a

**Belmont Public Schools
School Committee Program Budget
Percentage Distribution**

Account	FY93	FY95	FY98	% Point Incr / Decr. FY93 - FY98
Administration	3.4%	3.3%	3.1%	-0.3%
Instruction	76.2%	77.5%	78.8%	2.6%
Other School Services	4.3%	3.7%	3.8%	-0.5%
Operation and Maintenance	12.1%	10.8%	9.5%	-2.6%
Acquisition of Equipment	0.3%	0.0%	0.1%	-0.2%
Programs with Other Districts	3.7%	4.7%	4.7%	1.0%
Total	100.0%	100.0%	100.0%	

Note: Data obtained from BPS. Percentages may not equal due to rounding.

Chart 6-2 provides a more detailed review of budgeted teaching salaries by selected disciplines. This chart indicates that salaries for core subjects, elementary and SPED increased the greatest in dollar terms of the disciplines shown from FY93 to FY98.

Chart 6-2

**Belmont Public Schools
Budgeted Teaching Salaries - Selected Disciplines
(in thousands of dollars)**

Discipline	FY93	FY95	FY98	FY93 - FY98 \$ Incr / Decr	% Incr / Decr	% of Total
Core Subjects	\$2,473	\$2,521	\$3,878	\$1,405	56.8%	28.8%
Art	\$265	\$294	\$354	\$89	33.6%	1.8%
Music	\$329	\$377	\$469	\$140	42.6%	2.9%
Physical Education	\$351	\$340	\$409	\$58	16.5%	1.2%
Elementary	\$3,042	\$3,802	\$5,530	\$2,488	81.8%	51.1%
SPED	\$1,170	\$1,139	\$1,440	\$270	23.1%	5.5%
Reading	\$70	\$101	\$339	\$269	384.3%	5.5%
Foreign Language	\$398	\$453	\$551	\$153	38.4%	3.1%
Total Selected	\$8,098	\$9,027	\$12,970	\$4,872	60.2%	100.0%

Note: Data obtained from BPS. Core subjects are English, math, science and social studies.
Kindergarten included in elementary.

Chart 6-2a shows the same program budget data on a percentage distribution basis to illustrate how budgeted teaching salaries in selected disciplines have changed since FY93.

Chart 6-2a

**Belmont Public Schools
Distribution of Teachers' Salaries - Selected Disciplines**

Discipline	FY93	FY95	FY98	% Point Change FY93 - FY98
Core Subjects	30.5%	27.9%	29.9%	-0.6%
Art	3.3%	3.3%	2.7%	-0.5%
Music	4.1%	4.2%	3.6%	-0.4%
Physical Education	4.3%	3.8%	3.2%	-1.2%
Elementary	37.6%	42.1%	42.6%	5.1%
SPED	14.4%	12.6%	11.1%	-3.3%
Reading	0.9%	1.1%	2.6%	1.7%
Foreign Language	4.9%	5.0%	4.2%	-0.7%
Total Selected	100%	100%	100%	

Note: Data obtained from BPS. Core subjects are English, math, science and social studies. Kindergarten included in elementary. Percentages and percentage point changes may not add due to rounding.

Budgeted teaching salaries are detailed by selected disciplines in *Appendix A2*.

7. Foundation Budget

The foundation budget is a target level of spending developed to ensure that a minimum level of education resources is available per student in each school district. The foundation budget is shown in *Appendix B* is determined by a number of factors including enrollment, staffing, and salary levels. The key items in the foundation budget: payroll, non-salary expenses, professional development, expanded programs, extraordinary maintenance, books, and instructional equipment. DOE calculates each of these budget items using foundation enrollment with adjustments for special education, bilingual and low-income students. Certain salary levels and FTE standards are used to calculate salary budgets that also include annual adjustments for inflation.

The foundation budget establishes spending targets by grade (pre-school, kindergarten, elementary, junior/middle, and high school) and program (regular day, special education, bilingual, vocational, and expanded or after-school activities). Grade and program spending targets are intended to serve as guidelines only and are not binding on local school districts. To encourage appropriate levels of spending, M.G.L. Ch.70, § 9 requires that a school district report to the Commissioner of Education when it has failed to meet foundation budget spending

levels for professional development, books and instructional equipment, extended/expanded programs, and extraordinary maintenance.

According to *Chart 7-1*, expenditures did not reach foundation budget in any of the expenditure categories for the fiscal years shown, with the exception of FY96 books and equipment which exceeded foundation budget target by \$149,000. However, BPS has exceeded the minimum professional development spending requirement by law for FY95, FY96 and FY98. This minimum requirement is less than the foundation budget target number listed in *Chart 7-1*.

Chart 7-1

**Belmont Public Schools
Net School Spending According to Foundation Budget
(in thousands of dollars)**

	FY94		FY96		FY98	
	Actual	Budget	Actual	Budget	Actual	Budget
Professional Development	\$81	\$230	\$170	\$273	\$268	\$288
Books and Equipment	\$517	\$835	\$1,112	\$963	\$949	\$1,030
Expanded Program	\$0	\$36	\$0	\$80	\$0	\$87
Extraordinary Maintenance	\$0	\$435	\$0	\$513	\$61	\$544

Expenditures As Percentage of Foundation Budget

	FY94	FY96	FY98
	NSS/FND	NSS/FND	NSS/FND
Professional Development	35.0%	62.3%	93.0%
Books and Equipment	61.9%	115.5%	92.2%
Expanded Program	0.0%	0.0%	0.0%
Extraordinary Maintenance	0.0%	0.0%	11.2%

Note: Data obtained from DOE and BPS. Percentages calculated using whole dollars.

Appendix B shows the BPS foundation budget for FY94, FY96 and FY98. For each year, the chart shows expenditures and variances from the foundation budgets as well as how expenditures compare with the foundation budgets. In FY98, the data indicates that spending was greater than the foundation budget target for teaching salaries by \$4.4 million and for special needs tuition by \$542,000 but was less than foundation budget target for support salaries by \$1.5 million and for extraordinary maintenance by \$483,000.

8. Staffing – Full Time Equivalent (FTE) Trends

Salaries comprise approximately 59.2 percent of FY98 total school district expenditures and budget changes closely reflect changes in staffing or FTEs.

According to *Chart 8-1*, BPS had a total of 349.6 FTEs including 205.0 teachers in FY89. By FY93 total FTEs decreased to 345.3 while teaching FTEs decreased to 196. With the assistance of education reform, staffing has increased each year and by FY98 total FTEs reached 371.6 with 224 teaching FTEs. This addition of 28 teaching FTEs represented an increase of 14.3 percent from FY93 to FY98. This compares to a total student enrollment increase also of 14.3 percent from FY93 to FY98. In this context, teachers exclude instructional assistants. Para-professionals, guidance counselors, psychologists, cafeteria, custodians and maintenance personnel are included as all others in *Chart 8-1*.

Chart 8-1

**Belmont Public Schools
Staffing Trends
Full Time Equivalent (FTE)**

	Total FTEs	Teachers	Teachers as % Instruct.		Administrators	All Others
			of FTEs	Assists.		
FY89	349.6	205.0	58.6%	50.7	26.0	67.9
FY93	345.3	196.0	56.8%	53.9	22.9	72.5
FY98	371.6	224.0	60.3%	55.5	21.4	70.7
FY89-93	-4.3	-9	209.3%	3.2	-3.1	4.6
Incr./ Decr.	-1.2%	-4.4%		6.3%	-11.9%	6.8%
FY93-98	26.3	28	-	1.6	-1.5	-1.8
Incr. / Decr.	7.6%	14.3%		3.0%	-6.6%	-2.5%
FY89-98	22	19.0	86.4%	4.8	-4.6	2.8
Incr. / Decr.	6.3%	9.3%		9.5%	-17.7%	4.1%

Note: Data obtained from BPS. FTEs are from October 1 reports.

Chart 8-2 shows changes in teaching FTEs by type of school or program. The largest increase in teachers occurred at the middle school level between FY93 and FY98 when 22.8 FTEs were added. This was a 68.7 percent increase which is due to the addition of grade 5 at the new Middle School in 1997. This is also the reason for the decrease of 6.7 FTEs at the elementary level. Special education FTEs decreased by less than one between FY93 and FY98.

Chart 8-2

**Belmont Public Schools
Teachers By Program
Full Time Equivalents
(excluding teaching aides)**

	FY93 - FY98				
	FY89	FY93	FY98	Increase	% Incr / Decr
Elementary	61.0	71.2	64.5	-6.7	-9.4%
Middle *	41.5	33.2	56.0	22.8	68.7%
High School	59.5	42.5	44.3	1.8	4.2%
Systemwide	22.5	24.0	30.0	6.0	25.0%
Subtotal	184.5	170.9	194.8	23.9	14.0%
ESL/Bilingual	0.0	0.0	0.0	0.0	-
Special Education	20.5	25.1	24.2	-0.9	-3.6%
Subtotal	20.5	25.1	24.2	-0.9	-3.6%
Total	205.0	196.0	219.0	23.0	11.7%

Note: Data obtained from BPS. Data from teacher listings and Oct. 1 report. Kindergarten and Pre-K included in elementary. * In 1997 the new Middle School opened and included 5th, 6th, 7th and 8th grades where the old school only had 6th, 7th and 8th grade students.

Student/teacher ratios increased from FY89 to FY93 and remained constant from FY93 to FY98 as shown in *Chart 8-3*. The overall ratio for students and teachers was 14.0:1 in FY89. It increased to 15.9:1 in FY93 and remained the same in FY98. The FY98 ratio is above the statewide ratio of 14.2:1. When adjusted for the number of SPED teachers, using the same total student population for illustration purposes, the resulting all student ratios would be higher as shown in *Chart 8-3*.

*Chart 8-3***Belmont Public Schools
Students Per FTE Teacher**

	FY89	FY93	FY98
All Students / All FTE Teachers	14.0	15.9	15.9
All Students / All FTE Teachers - State Average	13.8	15.1	14.2
All Students / All Non-SPED FTE Teachers	15.6	18.2	17.8
All Students / All Non-SPED FTE Teachers - State Avg.	17.2	19.2	18.1
All Students / All Non-SPED FTE Teachers			
Elementary	22.0	23.4	27.2
Middle	14.4	19.4	14.6
High	15.0	18.0	21.1

Note: Data obtained from BPS. Kindergarten and Pre-K included in Elementary.

Teaching staff decreased in all core subject areas from FY89 to FY93 as shown in *Chart 8-4* and then increased in FY98. FY98 FTE levels are higher than they were in FY89 in all subject areas.

*Chart 8-4***Belmont Public Schools
Teacher FTEs - Core Subjects
High and Middle School**

	FY89	FY93	FY98	FY93 - FY98	
				Increase	% Incr / Decr
English	15.8	12.6	16.4	3.8	30.2%
Mathematics	15.8	13.0	16.0	3.0	23.1%
Science	14.6	12.5	19.5	7.0	56.0%
Social Studies	15.0	12.2	16.6	4.4	36.1%
Total	61.2	50.3	68.5	18.2	36.2%

Note: Data obtained from BPS.

9. Payroll – Salary Levels, Union Contracts

Expenditures for salaries are reviewed to determine how the school district has increased expenditures for teachers and how teaching salaries have increased as a result of union contract agreements.

Chart 9-1 indicates how school salaries have increased in comparison to total school district expenditures. BPS increased its expenditures for salaries by \$3.0 million

between FY93 to FY98, an increase of 22.8 percent. This is 9.1 percent less than the increase in total school district expenditures during the same time period. Total salaries made up 63.6 percent of these expenditures in FY93 and decreased to 59.2 percent in FY98. Total school district expenditures include fringe benefits.

Of the \$6.6 million total school district expenditure increase from FY93 to FY98, \$3.0 million is attributable to salaries. Of this \$3.0 million, \$2.3 million or 76.1 percent applied to teaching salaries and \$700,000 or 23.9 percent applied to non-teaching salaries such as those for administrators, para-professionals, clerical, and custodial staff.

Chart 9-1

Belmont Public Schools
Salary Expenditures Compared to Total School District Expenditures
 (in millions of dollars)

	FY92	FY93	FY96	FY98	FY93 - FY98	
					\$ Incr. / Decr.	% Incr. / Decr.
Total School District Expenditures	\$19.9	\$20.8	\$24.2	\$27.4	\$6.6	31.9%
Total Salaries	\$13.0	\$13.2	\$14.5	\$16.2	\$3.0	22.8%
as % of Total Expenditures	65.5%	63.6%	59.9%	59.2%	45.4%	
Teaching Salaries	\$8.9	\$9.0	\$10.2	\$11.3	\$2.3	25.3%
as % of Total Salaries	68.6%	68.3%	70.4%	69.8%	76.1%	
Non-Teaching Salaries	\$4.1	\$4.2	\$4.3	\$4.9	\$0.7	17.2%
as % of Total Salaries	31.4%	31.7%	29.6%	30.2%	23.9%	

Note: Data obtained from BPS. Numbers may not add due to rounding.

Chart 9-2 shows the average teacher's salary increased from \$44,765 to \$50,701 between FY93 and FY98. The FY98 average is above the state average of \$44,051 reported by DOE.

Chart 9-2

**Belmont Public
Teaching Salaries and Teachers
Average Salary**

	FY92	FY93	FY94	FY95	FY96	FY97	FY98
Teaching Salaries (\$ in	\$8.9	\$9.0	\$9.3	\$9.8	\$10.2	\$10.8	\$11.3
FTE -	204.1	201.5	205.8	213.4	212.3	217.7	223.0
FTE Incr. / Decr. Previous Year	N/A	-2.6	4.3	7.6	-1.1	5.4	5.3
Average Salary per	\$43,809	\$44,765	\$45,080	\$45,826	\$48,112	\$49,561	\$50,701
DOE Reported State Average	N/A	\$38,681	\$39,012	\$40,718	\$41,760	\$42,874	\$44,051

Note: FTE excludes adult education teachers. Average salary per FTE consists of all salaries (i.e. asst principals, advisors, coaches etc.), step increases, longevity and differentials. Data obtained from BPS and DOE end-of-year reports.

Of the additional \$2.29 million spent for teaching salaries between FY93 and FY98 as shown in *Chart 9-2a*, \$730,000 or 32 percent represents the cost of new positions and \$1.43 million or 63 percent represents the salary increase associated with the assumed three percent inflationary rate of existing staff as of FY93. For FY98, according to the town of Belmont annual report, approximately 56.8 percent of teachers are on the top step.

Chart 9-2a

Belmont Public Schools
Salary Expenditures
Estimated Cost of New Positions and Salary Increases
(in millions of dollars)

	FY93	FY98	% of Cumulative Increase
Total Teaching Salary Exp.	\$9.02	\$11.31	
Cumulative Increase from FY93		\$2.29	100%
Est. Cost of 3% Inflationary Increase		\$1.43	63%
Est. FY93-FY98 Cost of New Positions		\$0.73	32%
Subtotal		\$2.17	95%
Est. Amount above 3% Annual Increase		\$0.12	5%

Note: Analysis based on data obtained from BPS

Chart 9-2b indicates that increases due to annual contracts and step increases ranged between 4.2 percent and 10.2 percent from the 1993 to 1998 time period. Teachers worked under the provisions of the previously expired contract from September 1994 to January 1995. Teachers did not receive a contract increase for FY95 when the agreement was finally reached.

Chart 9-2b

Belmont Public Schools
Teachers Salaries - Step and Contract Percent Increases

Period	1993	1994	1995	1996	1997	1998	1999	Total
Annual Contract Increase	5.0%	6.0%	0.0%	3.5%	3.5%	4.0%	4.0%	26.0%
Step Increase	4.2%	4.2%	4.2%	4.2%	4.2%	4.2%	4.2%	29.4%
Total	9.2%	10.2%	4.2%	7.7%	7.7%	8.2%	8.2%	47.2%

Note: Data obtained from BPS. BPS teachers did not have a contract at the start of the 1995 school year and worked without a contractual raise for the year.

BPS has seven salary lanes. Lanes one and two, bachelor's degree and bachelor's degree plus 15 credits, have 13 steps. The salary lanes for master's degree, master's degree plus 15 credits, master's degree plus 30 credits, master's degree plus 45 credits, and doctorate degree have 14 steps.

As shown in *Chart 9-3*, a review of salary changes over the FY93 to FY00 period indicates that the top step salary level increased by 29.2 percent without including step increases or lane changes. This represents the minimum increase a full time teacher would receive exclusive of raises due to step changes or obtaining additional academic credits. In contrast, the state and local government implicit price deflator indicates about 12.2 percent inflationary trend for the FY93 to FY98 period.

Chart 9-3 shows how BPS salary schedules might apply to a particular teacher for the period of FY93 to FY00 depending on the step and academic degree. Various examples outline different situations. The chart illustrates so-called lane changes due to degree earned such as BA to an MA and an MA to a Ph.D.

For example, as of FY93, Teacher A was the maximum step of 13 and had a BA. By FY00, this teacher still on step 13 received salary increases totaling to 29.3 percent. If this teacher had earned an MA and changed salary lane to MA, which has an additional step, the increase would have amounted to 43.6 percent.

Teacher B had a BA, step 7, in FY93. In FY00, this teacher was on step 13 and received a salary increase of 67.5 percent. Had this teacher earned an MA and changed salary lane during this period, the increase would have amounted to 86.1 percent.

Teacher C entered BPS with a BA at step 1 in FY93. By FY00, this teacher reached step 8 and received a 71.0 percent increase in pay. By earning the next degree, an MA, during this period, the percent increase in salary would have reached 84.0 percent.

Chart 9-3

Belmont Public Schools Teaching Staff Step/Degree Summary - Selected Years

	FY93 Base Pay		FY00 Base Pay			FY93-00 % Change	
	Step	Base Pay BA	Step	Base Pay BA	MA	BA	MA
Teacher A	13	\$41,175	13 & 14	\$53,227	\$59,123	29.3%	43.6%
Teacher B	7	\$31,769	13 & 14	\$53,227	\$59,123	67.5%	86.1%
Teacher C	1	\$24,872	8	\$42,543	\$45,764	71.0%	84.0%
		MA		MA	Ph. D	MA	Ph. D.
Teacher A	14	\$45,761	14	\$59,123	\$65,246	29.2%	42.6%
Teacher B	7	\$34,266	14	\$59,123	\$65,246	72.5%	90.4%
Teacher C	1	\$26,703	8	\$45,764	\$50,828	71.4%	90.3%

Note: BPS has 7 salary lanes: BA - Bachelor's degree, BA+15, MA - Master's degree, MA+15, MA+30, MA+45, and Ph.D. BA and BA+15 have 13 steps; MA through Ph. D have 14 steps.
Data obtained from BPS.

Chart 9-4

**Belmont Public Schools
Teaching Salary Schedules
Comparison of FY93 through FY00 Salary Schedules**

Salary Lane	Initial Entry Level							
	FY93	FY94	FY95	FY96	FY97	FY98	FY99	FY00
BA	\$24,872	\$26,131	\$27,046	\$27,993	\$28,973	\$30,132	\$30,132	\$31,036
BA + 15	\$25,360	\$26,644	\$27,577	\$28,542	\$29,541	\$30,723	\$30,723	\$31,645
MA	\$26,703	\$28,055	\$29,037	\$30,053	\$31,105	\$32,349	\$32,349	\$33,319
MA + 15	\$27,458	\$28,848	\$29,858	\$30,903	\$31,985	\$33,264	\$33,264	\$34,262
MA + 30	\$28,237	\$29,667	\$30,705	\$31,780	\$32,892	\$34,208	\$34,208	\$35,234
MA + 45	\$29,090	\$30,562	\$31,632	\$32,739	\$33,885	\$35,240	\$35,240	\$36,297
Ph. D	\$29,936	\$31,451	\$32,552	\$33,691	\$34,870	\$36,265	\$36,265	\$37,353
Salary Lane	Highest Level							
	FY93	FY94	FY95	FY96	FY97	FY98	FY99	FY00
BA	\$42,204	\$44,773	\$44,773	\$46,340	\$47,962	\$49,880	\$51,376	\$53,227
BA + 15	\$42,914	\$45,527	\$45,527	\$47,120	\$48,769	\$50,720	\$52,242	\$54,118
MA	\$46,905	\$49,761	\$49,761	\$51,503	\$53,306	\$55,438	\$57,101	\$59,123
MA + 15	\$47,910	\$50,827	\$50,827	\$52,606	\$54,447	\$56,625	\$58,324	\$60,382
MA + 30	\$49,145	\$52,137	\$52,137	\$53,962	\$55,851	\$58,085	\$59,828	\$61,931
MA + 45	\$50,466	\$53,538	\$53,538	\$55,412	\$57,351	\$59,645	\$61,434	\$63,586
Ph. D	\$51,789	\$54,942	\$54,942	\$56,865	\$58,855	\$61,209	\$63,045	\$65,246

Note: BPS has 7 salary lanes: BA - Bachelor's degree, BA+15, MA - Master's degree, MA+15, MA+30, MA+45, and Ph.D. BA and BA+15 have 13 steps; MA through Ph. D have 14 steps.
Data obtained from BPS.

10. Courses and Class Size

Chart 10-1 shows core class sections and enrollment as well as average class sizes as of September 1999 for the 1999/00 school year. The average enrollment in these sections was 23.0 students or less per class. English had the smallest average class with 20.0 students, while social studies had the largest with 23.0 students. All core subjects had some sections with at least 25 students, and math and social studies had at least one section of 30 or more.

Chart 10-1

Belmont Public Schools
High School Classes
1999/00 School Year

Subject	Number of Sections	Total Enrollment	Avg. Enroll. Per Section	Sect. w/ 25-29	Sect. w/ 30 or more	30+ %
English	51	1021	20.0	11	0	0.0%
Math	50	1019	20.4	12	1	2.0%
Science	48	982	20.5	11	0	0.0%
Social Studies	60	1382	23.0	22	3	5.0%

Note: Data obtained from BPS

11. Technology

BPS submitted a five-year technology plan to DOE in June 1996 covering the years FY97 to FY01. DOE approved the plan on August 6, 1996. The plan was prepared by a 21 member Broad-based Technology Team which included individuals from the school district staff, parents and community members. Funding for the plan was to be provided by an appropriation in the school budget, federal and state grants, and grants from the Belmont Foundation for Education, corporate gifts and bond or debt exclusion.

The plan projected that full implementation would cost \$1.9 million over five years. As of FY98, the second year of the five-year plan, \$253,431 or 13.3 percent has been expended.

As of the audit date, there are 328 computers in the district. The High School, Middle School and two elementary schools have at least one computer lab. All schools have computers within the classrooms. According to DOE's FY99 School District Profile, BPS has 13.7 students per computer, higher than the state average of 6.3.

Each school in the district has its own Local Area Network (LAN). However, the schools currently are not connected to a Wide Area Network (WAN). BPS anticipates WAN connection by August of 2000. All buildings have Internet access, which is provided to BPS by Merrimack Education Center. The district monitors and controls access to unauthorized sites on the Internet with the use of the software package Cyber Patrol. Students also are required to sign an "Acceptable Use Policy" form. There currently is not a formal inventory system in place for hardware and software.

12. Supplies and Textbooks

Chart 12-1 details total instructional service expenditures by grade level for selected years, details the portion of expenditures for textbooks only and shows annual per student expenditures. Instructional service expenditures include textbooks, supplies, and other activities involving the teaching of students and exclude salaries.

According to *Chart 12-1*, total actual expenditures between FY93 and FY98 increased \$232,000 or 38.4 percent from \$604,000 to \$835,000. Textbook expenditures increased from \$89,000 in FY93 to \$131,000 in FY98 while other expenditures increased from \$515,000 to \$705,000 during the same period.

Chart 12-1

Belmont Public Schools
Textbooks and Other Instructional Expenditures
(in thousands of dollars)

	FY93	FY94	FY95	FY96	FY97	FY98	FY93 - FY98	
							\$ Incr.	% Incr.
High School	\$126	\$128	\$102	\$180	\$103	\$168	\$42	33.3%
Middle School	\$97	\$71	\$76	\$438	\$105	\$134	\$36	37.1%
Elementary	\$171	\$37	\$152	\$163	\$129	\$156	(\$15)	-8.5%
SPED	\$209	\$215	\$206	\$260	\$366	\$378	\$168	80.4%
Total	\$604	\$452	\$535	\$1,040	\$703	\$835	\$232	38.4%
Textbooks Only	\$89	\$58	\$92	\$109	\$122	\$131	\$42	47.4%
Other Expenditures	\$515	\$394	\$443	\$932	\$581	\$705	\$190	36.9%
Textbooks / Student	\$29	\$18	\$28	\$32	\$35	\$37	\$8	28.8%
Exp. / Student	\$166	\$124	\$133	\$271	\$167	\$199	\$33	19.6%

Note: Data obtained from BPS and DOE. Elementary includes kindergarten and preschool.

Textbooks are replaced within BPS seven year curriculum cycle whenever possible, however textbooks are also purchased when changes in the curriculum dictate or as the physical condition of current textbooks deteriorate. Textbooks in some advanced placement high school courses generally have to be replaced more frequently than others. When new textbooks are purchased a committee of subject specific teachers chaired by the department coordinator meets to review the options. The committee's choice is then reviewed by a departmental steering committee made up of BPS teachers, administrators, and parents. The assistant superintendent for curriculum and instruction provides a final review of the committee's selection. New textbooks are purchased after the completion of a successful pilot in each school where the book will be used.

13. Test Scores

BPS test scores are above state averages. MCAS scores show that BPS scored above the state average scaled scores for grades 4, 8, and 10 for 1998 and 1999 in all areas. MEAP, the state's educational testing program from 1988 to 1996, showed that BPS 1996 MEAP scores were above the state average in all areas for all grades.

Scholastic Aptitude Test (SAT)

SAT scores are significantly above the state average as shown in *Chart 13-1*. Scores from 1994 and 1995 cannot be compared to 1996 and 1997 scores since SAT scores were "recentered" in 1996 resulting in a higher score for those years and consequently a higher state average.

Chart 13-1

Belmont Public Schools Scholastic Aptitude Test (SAT) Results

SAT Scores	1994		1995		1996		1997		1998	
	BPS	State Avg.	BPS	State Avg.	BPS	State Avg.	BPS	State Avg.	BPS	State Avg.
Verbal	492	426	484	430	556	507	555	508	554	502
Math	564	475	553	477	571	504	582	508	587	502
Total	1056	901	1037	907	1127	1011	1137	1016	1141	1004
BPS - % of State Avg.	117.2%		114.3%		111.5%		111.9%		113.6%	

Note: Data obtained from BPS and DOE

Massachusetts Educational Assessment Program (MEAP)

An overview of BPS MEAP scores is shown in *Appendix C*. MEAP scores are reported in two ways: scaled scores, which range from 1000 to 1600, and proficiency levels which are reported as a percentage of students in each proficiency. Level 1 is the lowest, level 2 is considered the "passing grade" level while levels 3 and 4 constitute the more advanced levels of skills. According to *Appendix C*, 1996 MEAP scores were above the state average for all grades.

Proficiency scores for 1992 and 1996 shown in *Chart 13-2* indicate that scores for BPS grade 4 students increased in three of four subject areas for levels 3 and 4. The scores for grade 8 students show an increase in level 2 in all four subject areas during this same time period.

Chart 13-2

**Belmont Public Schools
MEAP Proficiency Scores
1992 - 1996 Fourth and Eighth Grades**

Fourth Grade	1992			1996		
	Level 1 or Below	Level 2	Levels 3 & 4	Level 1 or Below	Level 2	Levels 3 & 4
Reading	25%	44%	31%	25%	31%	44%
Mathematics	24%	50%	26%	24%	45%	31%
Science	29%	37%	33%	20%	48%	31%
Social Studies	26%	47%	27%	22%	47%	30%
Eighth Grade	1992			1996		
	Level 1 or Below	Level 2	Levels 3 & 4	Level 1 or Below	Level 2	Levels 3 & 4
Reading	27%	31%	42%	12%	35%	53%
Mathematics	27%	29%	45%	20%	40%	40%
Science	30%	23%	47%	17%	36%	47%
Social Studies	27%	32%	41%	29%	36%	35%

Note: Data provided by DOE and BPS

Chart 13-3 shows MEAP grade 4 reading scores for selected school districts whose scores in 1988 ranged from 1410 to 1450 as compared to BPS's score of 1430. The scores for grade 4 students are particularly significant, because by 1996, the greatest impact of education reform should initially be seen in the performance of these students. The reading scores for BPS grade 4 students increased 50 points from 1992 to 1996. This is considered to be significant improvement.

Chart 13-2

MEAP Reading Scores - 4th Grade- 1988 Scores from 1410-1450

	1988	1990	1992	1994	1996	1992 - 1996 Change
Middleton	1410	1340	1370	1370	1460	90
Cohasset	1410	1430	1410	1460	1450	40
Andover	1410	1420	1470	1460	1430	-40
West Boylston	1410	1370	1450	1470	1400	-50
Amherst	1410	1380	1410	1410	1370	-40
Lanesboro	1410	1390	1360	1420	1360	0
Richmond	1410	1390	1360	1420	1360	0
Newton	1420	1450	1480	1500	1480	0
Concord	1420	1470	1440	1510	1470	30
Sudbury	1420	1450	1390	1510	1470	80
Norwell	1420	1440	1410	1460	1440	30
Southboro	1420	1450	1460	1450	1440	-20
Wrentham	1420	1450	1380	1470	1410	30
Lunenburg	1420	1420	1410	1350	1340	-70
Petersham	1430	1600	1600	1420	1540	-60
Belmont	1430	1440	1420	1480	1470	50
Boxford	1430	1520	1490	1450	1460	-30
Carlisle	1430	1470	1460	1460	1450	-10
Abington	1430	1370	1380	1440	1400	20
Bedford	1440	1460	1420	1480	1480	60
Hingham	1440	1450	1460	1480	1460	0
Pentucket	1440	1440	1430	1390	1430	0
Boxborough	1440	1560	1420	1460	1410	-10
Wellesley	1450	1460	1490	1440	1510	20
Mendon Upton	1450	1460	1490	1500	1510	20
Acton	1450	1500	1510	1480	1480	-30
Hamilton Wenham	1450	1380	1450	1500	1470	20
Longmeadow	1450	1410	1430	1450	1430	0
State Average	1300	1310	1330	1300	1350	20

Note: A significant change in a score is considered to be 50 points in either direction.

Iowa Tests

The Iowa Tests of Basic Skills (Iowa tests) for grade 3 students were administered throughout Massachusetts in the Spring of 1998. Results were categorized by students tested under routine conditions, students with disabilities tested under non-routine conditions and students with limited English proficiency. BPS was at the 79th percentile in reading for all students tested under routine conditions. The state mean average score was at the 64th percentile. The test defines four different levels of reading comprehension: pre-reader, basic reader, proficient reader and advanced reader. Ten percent of students tested as pre- or basic readers while 89 percent of students tested as proficient or advanced. In 1998, 44 percent of BPS students were advanced readers, which is higher than the state average of 23 percent for that same

category. About 83 percent of the tested students have attended BPS since the first grade.

The Iowa Tests of Educational Development, also referred to as the Massachusetts Grade 10 Achievement Test, was administered in the spring of 1997. It tested seven different areas of skills including reading, quantitative thinking and social studies. Scores were based on a national sample of students who took the test. BPS grade 10 students scored at the 86th percentile compared to the national sample. BPS's performance at the 86th percentile compares to scores as high as the 89th percentile and as low as the 28th percentile for other Massachusetts school districts.

Educational Records Bureau: Comprehensive Testing Program III (ERB Tests)

BPS administers ERB Tests to grades three, five, seven, and nine in January. Students are tested in reading comprehension, word analysis, writing mechanics and mathematics. The ERB Tests compare Belmont scores with a national norm population, a suburban norm population, and independent school norms. The ERB Tests serve as aptitude and achievement predictors. Results from these tests indicate high achievement levels for BPS students.

Massachusetts Comprehensive Assessment System (MCAS)

MCAS scores for 1998 are above the state average scaled scores in all areas, including all students and students attending the district for three years or more.

MCAS is the new statewide assessment program administered annually to grades 4, 8 and 10. It measures performance of students, schools and districts on learning standards contained in the Massachusetts curriculum frameworks and fulfills the requirements of education reform. This assessment program serves two purposes:

- measures performance of students and schools against established state standards; and
- improves effective classroom instruction by providing feedback about instruction and modeling assessment approaches for classroom use.

MCAS tests are reported according to performance levels that describe student performance in relation to established state standards. Students earn a separate performance level of advanced, proficient, needs improvement, or failing based on their total scaled score for each test completed. There is no overall classification of student performance across content areas. School, district, and state levels are reported by performance levels.

Chart 13-4 reflects performance level percentages for all BPS students in tested grades. *Appendix D* provides additional detail for students who have attended schools in the district for at least three years.

Chart 13-4

Belmont Public Schools
Comparison of 1998 and 1999 MCAS Average Scaled Scores

All Students	1998 District	1998 State	Point Diff.	1999 District	1999 State	Point Diff.	1998 - 1999 Inc./Dec.	
							District	State
Grade 4:								
English Language Arts	237	230	7	238	231	7	1	1
Mathematics	246	234	12	249	235	14	3	1
Science & Technology	245	238	7	247	240	7	2	2
Grade 8:								
English Language Arts	245	237	8	246	238	8	1	1
Mathematics	241	227	14	240	228	12	-1	1
Science & Technology	239	225	14	238	224	14	-1	-1
History	N/A	N/A	N/A	232	221	11	N/A	N/A
Grade 10:								
English Language Arts	246	230	16	246	229	17	0	-1
Mathematics	245	222	23	243	222	21	-2	0
Science & Technology	240	225	15	239	225	14	-1	0

Note: Data provided by DOE

14. Management and Personnel Practices

In 1990/91, the Superintendent began an initiative to create a district "blue print" that would become a five-year strategic plan. Over the next few years BPS administrators, school committee members and a paid consultant from Future Management Systems worked closely with community volunteers. Task forces were developed to analyze data and demographic information.

A five-year (1994-99) strategic plan was approved in April 1994 and adopted for school year 1994/95. The plan contained a mission statement and established goals and priorities with objectives and indicators of success in six major areas:

- Curriculum and Instruction
- Organizational Development
- Human Resources
- Community Resources
- Financial Planning
- Facilities

Currently, BPS is drafting a new five-year (1999-2004) strategic plan. This plan contains a new mission statement and updated goals and expected outcomes in the six major areas of the plan. Community volunteers were included in the revision and update process.

BPS also develops an annual Education Improvement Plan (EIP) for the district. This document is developed over the summer after a daylong brainstorming seminar that brings together 15 administrators (central office, principals and curriculum

coordinators) with two parents and teachers from each school. The EIP is viewed as a document that connects the district's strategic plan to the individual school improvement plans.

The final EIP has yearly objectives to be met in each of the six goal areas from the strategic plan. Each objective is referenced to the strategic goal and which program/school the objective is related to, who is the responsible point person, what action step is expected and a timeline for completion.

The school committee receives a draft of the EIP in September and makes suggestions for changes. The final version of the EIP is usually approved by the school committee in October after any changes are completed.

BPS uses a school based budget process to compile the district-wide school budget. Each principal is given a "budget book" that contains their prior-year school program budget, prior-year personnel and a zero based equipment budget. Principals are required to submit their budgetary needs and reasons for changes. Department heads request equipment and the principal ranks the requests in order of need. Revisions and compromises are negotiated between the director of finance and the principals and department heads with input from the Superintendent and Assistant Superintendent.

In 1998/99 BPS developed a Working Relationship Committee as a result of the teacher's strike of 1995. The committee is made up of the Superintendent, three administrators, six teachers, and a school committee member and is intended to address concerns as they occur and before they become grievances.

BPS adopted performance-based contracts for principals as a school committee initiative in 1996/97. Performance based raises are based on a dollar figure capped by the school committee and distributed by the Superintendent. BPS has appointed three new principals since education reform went into effect and zero have been removed.

Since the beginning of education reform in 1993, BPS has made a concerted effort to use the evaluation process to remove under-performing teachers that haven't responded favorably to remediation. BPS has removed 70 teachers through non-renewals, retirements, and resignations between 1993/94 and 1998/99. Of these 70 teachers, 47 were non-professional status teachers and 23 were professional status teachers.

Hiring Process

BPS teaching vacancies are posted in statewide and minority newspapers. Principals review and paper screen the resumes of all qualified candidates. Pairs of elementary principals interview candidates for elementary teaching positions and prospective middle and high school teachers are interviewed by the school principal and curriculum coordinator for the applicable subject. The principal checks

references and recommendations and the top two or three applicants are referred to the Superintendent and Assistant Superintendent for an interview. Generally, the Superintendent will hire the principal's top choice. BPS hires the top candidate regardless of salary level.

BPS principal vacancies are posted in national, statewide, and minority publications. The assistant superintendent chairs a search committee made up of parents, teachers, and administrators. The search committee paper screens resumes against a job description and "profile of the desired candidate" that was compiled by the Superintendent with input from teachers and parents from the school. The search committee asks all candidates selected for an interview a previously developed set of questions, and the top two or three finalists are referred to the Superintendent. Finalists are interviewed individually by the Superintendent, the director of finance, and administration, the Assistant Superintendent for curriculum and instruction and the director of personnel, who each determine the applicants' qualifications in their areas of specialization. A small group made up of a parent, a teacher, the assistant superintendent and the Superintendent make site visits when applicable. The final step before the Superintendent offers the position is a televised public interview before the school committee and citizens.

The audit team examined contracts of the district's six individually contracted principals, the Superintendent, the assistant superintendent for curriculum and instruction, the director of finance, the director of student services and the human resources manager. All administrator contracts, except for the Superintendent's, are for two or three years and are staggered so that they do not all end on the same date. The Superintendent has a six-year contract that was signed in July 1999.

15. Accounting and Reporting

The audit team traced a sample of expenditures reported to DOE to BPS accounting records. Additionally, the audit team met separately with the Town Accountant and was satisfied with the safeguards that exist for proper internal control. Based on the sample, the audit team believes the reports are an accurate representation of BPS expenditures.

There is a good working relationship between the town and the school department. Separation of duties and responsibilities is maintained throughout the school system and the town accountant provides general oversight and review. The Belmont treasurer's office issues payroll and vendor checks.

The audit team noted that the business manager, not the school committee, has been approving payrolls before the town treasurer receives them. DLS has ruled that even after the passage of education reform, the school committee remains the head of the school department for approving bills and payrolls under M.G.L. Ch.41 §§41 and 56. The audit team found the business manager's review and signature is only offsetting control to mitigate the potential of inappropriate expenditure of funds. By

law, the school committee has fiscal oversight responsibility. We therefore suggest that BPS and the town of Belmont review this process.

16. Review of Expenditures

The audit team completed a review of BPS expenditures and purchasing controls and analyzed the accounting system and selected accounts from the general ledger for FY98 and FY99. The review revealed that purchasing procedures and controls are in place and that approvals and authorizations are being utilized. Separation of duties and responsibilities is maintained throughout the school system.

The three largest contracts BPS has are for cleaning services for both the high school and the Chenery Middle School, food service to the various schools, and transportation services.

The cleaning contract is with S.J. Services, Inc. dated July 1, 1998 for the period July 1, 1998 to June 30, 2003. The contract calls for five annual payments of \$211,280, for a total of \$1,056,400. This contract was competitively procured.

The contract with Compass Group USA, Inc. (Chartwells Division) is for the food service program. The contract is for the administration of the self-supporting lunch program at all schools. BPS pays the firm an administrative fee of \$86,853 per year, which includes a Food Service Director with administrative and clerical support. In addition, BPS pays the contractor its cost of business including labor costs, food costs and other operating expenses. The contractor operates the food service program, BPS supplies equipment and the federal governmental food supplies granted to the BPS. All income is deposited in the school's cafeteria fund. Prices for the food are determined by mutual agreement between BPS and Compass Group USA, Inc. The original contract was for the period of August 1997 to June 2002. An amendment changed the termination date to June 30, 2000, but allowed for three additional one-year extensions by mutual agreement.

The current contract for bus transportation is with Laidlow Transit, Inc. and covers five years from 1997/98 to 2001/02. Annual payments are for \$248,400 payable in twelve equal installments.

17. High School Accreditation

Belmont High School was visited by a team from the New England Association of Schools and Colleges (NEASC) from March 29 to April 1, 1992. On May 20, 1997, based on the five-year status report, the NEASC voted to continue the high school's accreditation. As of March 4, 1997, BHS had completed 103 of the 114 recommendations in the report. Seven of the recommendations were rejected and four were in progress.

The four that were in progress were: a sophisticated bench system for the physics laboratory; a technology plan which has been submitted to the state for approval, review, and revision of curriculum; and repairs to the heating and ventilation systems.

In regard to the sophisticated bench system and the technology plan, BPS reported, "This standard will always be in progress because of the nature of the field. Hardware changes are very difficult to keep up with.

- A. We have a sophisticated bench system in physics which was provided by Boston University. It is a model which replicates what happens in modern physics labs in industry. Our students have benefited tremendously from the quick turn around time the computer provides in terms of processing their data.
- B. We have completed a technology plan which has been submitted to the state. The plan was developed by a group made up of students, parents and staff members. It is a thoughtful, high quality plan which if supported financially will keep us out in front of the hardware curve."

The five-year report for the alternative assessment/review and revise curriculum and instruction states, "This area has been the focus of a great deal of work. The science and mathematics departments have developed departmental exams which have included open-ended questions which test student's depth of knowledge and their ability to think. We are working vigorously in this area because the state exams are going to focus on higher process skills in the assessment model. The development of these departmental tests has been accompanied by some significant changes in curriculum and methodology. This is an area, which will be in process for the next few weeks as we continue to revise the model."

In the heating and ventilation area, the report states, "The heating and ventilation system has been tested and recommendations to increase the air flow in the roof units will be coming this Spring. This will allow us to push more fresh air through the building and especially in the rest rooms. There is money and a plan to finish this work during the spring months."

Roof repairs are on schedule and the major leaks in the field house have been corrected (new roof installed). The rest of the school roofing is on a two year schedule to be repaired."

18. Grade 3 Transiency

Student transiency is generally defined as the percentage of students who enter and/or leave a district after the first day of school. Transiency poses an educational problem because students may lose the benefit of a sequential and coherent school program as they move from school to school.

Belmont has a relatively stable student population in the lower grades as measured by the 1998 3rd grade Iowa reading test in comparison to 14 communities of similar population to Belmont. Results from that test are categorized by students who have taken the test under routine conditions. Students who did not take the test or were given extra time to finish the test are excluded. According to *Chart 18-1*, of the communities shown, BPS's transiency percentage of 17.3 percent is below the state average of 19.6 percent. BPS has a stable population percent of 82.7 percent, above the state average of 80.4 percent.

Chart 18-1

Transiency and Stability - 3rd Grade

Selected Communities by 1996 Population

Student Population Participating in the 1998 Iowa 3rd Grade Reading Test

Community	Stable Population	Total Population	Stable Population Percent	Transiency Percent
Dedham	205	224	91.5%	8.5%
Walpole	278	307	90.6%	9.4%
Stoneham	202	234	86.3%	13.7%
Milton	256	300	85.3%	14.7%
Danvers	250	297	84.2%	15.8%
Easton	234	279	83.9%	16.1%
Marshfield	279	335	83.3%	16.7%
Belmont	211	255	82.7%	17.3%
North Attleborough	287	349	82.2%	17.8%
Burlington	209	263	79.5%	20.5%
Wakefield	206	262	78.6%	21.4%
West Springfield	217	285	76.1%	23.9%
North Andover	285	375	76.0%	24.0%
Reading	222	293	75.8%	24.2%
Milford	129	262	49.2%	50.8%
Statewide	54,057	67,233	80.4%	19.6%

Note: Student population includes only students tested under "routine" conditions.

Data obtained from DOE's 1998 Iowa Grade 3 reading test summary results.

19. Special Education and Transitional Bilingual Education

Special Education (SPED)

According to *Chart 19-1*, BPS had a SPED participation rate of 15.0 percent in FY98, 1.6 percentage points lower than the state average of 16.6 percent reported by DOE. As a percentage of total enrollment, SPED enrollment has averaged 15.7 percent during the 1990s, but has been below that figure for the past three years. The percentage of substantially separate students in FY98 was 4.3 percent. This figure is lower than the average percentage of substantially separate students enrolled in BPS throughout the 1990s which was 5.0 percent.

The director of student services believes that SPED participation percentages have been below state averages because of a successful inclusion program that utilizes teacher assistance teams (TATs) and co-teaching between regular education and special education teachers. Strong principal leadership in BPS schools is credited for the successful relationship between regular classroom teachers and SPED teachers. In 1998/99, BPS hired a half-time inclusion specialist who provides in-service training for teachers and administrators.

Chart 19-1

**Belmont Public Schools
SPED Enrollment
Based on October 1 Reports**

School Year Ending	Total Enrollment	Total SPED	SPED as % of Total Enrollment	Substantially Separate	Substantially Separate as % of SPED
1991	2,858	483	16.9%	55	11.4%
1992	2,966	478	16.1%	27	5.6%
1993	3,107	481	15.5%	29	6.0%
1994	3,179	522	16.4%	19	3.6%
1995	3,332	546	16.4%	11	2.0%
1996	3,437	523	15.2%	19	3.6%
1997	3,495	500	14.3%	22	4.4%
1998	3,551	532	15.0%	23	4.3%

Note: Data obtained from BPS

According to *Chart 19-2*, the increase in SPED costs from FY93 to FY98 was \$881,624, or 32.2 percent, while the increase in total school district expenditures reported to DOE for the same period was \$6.6 million, or 31.7 percent. SPED expenditures for FY93 slightly increased from 13.0 percent of the total school district expenditures to 13.1 percent in FY98.

BPS is a member of LABBB (Lexington, Arlington, Bedford, Burlington and Belmont) collaborative which provides a variety of comprehensive specialized programs to serve special needs students in public school settings. In 1999/00, there are 22 BPS students participating in LABBB. The collaborative provides a high quality education that BPS administrators have a managerial voice in at a cost that is lower than what private alternatives would charge.

The "Key Program" at Belmont high school teaches the frameworks and learning standards to students with significant needs in smaller more concentrated classes. The program generally has about 40 students, half of which would have to be sent to out-of-district facilities if this program didn't exist. The director of student services

states this provides substantial cost savings to the district and also provides instruction superior to what would be provided elsewhere.

Chart 19-2

Belmont Public Schools
Total SPED Expenditures as Reported to DOE
(in whole dollars)

	FY92	FY93	FY98	FY93-FY98	
				\$ Incr. / Decr.	% Incr. / Decr.
SPED Program	\$ 2,392,288	\$ 2,519,418	\$ 3,388,386	\$ 868,968	34.5%
SPED Transportation	\$ 208,002	\$ 216,562	\$ 229,218	\$ 12,656	5.8%
Total SPED	\$ 2,600,290	\$ 2,735,980	\$ 3,617,604	\$ 881,624	32.2%

Note: Data obtained from BPS

Transitional Bilingual Education (TBE)

BPS does not have a bilingual program. BPS does not have a formal English as a Second Language (ESL) program. However, there were 322 students whose first language was not English in BPS in 1998/99. These students are taught in mainstream classrooms with the aid of seven ESL tutors. The S for curriculum and instruction stated that the parents of ESL students in Belmont generally request that their children are taught in English. Over one-third of the ESL population in Belmont is Chinese or Japanese speaking.

20. Dropout and Truancy

Chart 20-1 identifies Belmont's dropout rates from FY93 to FY97 in comparison to the state average and to 14 communities of similar population to Belmont. Belmont's dropout rate was 0.8 percent in FY97, significantly lower than the state average of 3.4 percent. According to the chart, Belmont has the fourth lowest dropout rate of the 14 selected communities.

Although there is no formal dropout prevention program at BHS, there are alternatives for at risk students. BHS offers a "Key Program" to help struggling students. It provides intensive academic and emotional support for students while offering small class instruction. Also, the Town of Belmont employs a social worker who spends time with students at the Middle and High schools. Usually if a student wishes to drop out, someone within the school system has a relationship with the student and advises them against dropping out. If a student does drop out a letter is sent home. BHS is affiliated with a G.E.D. program in Newton where BHS dropouts are encouraged to enroll.

Teachers are the first to contact parents of any unexcused absences, whether a student is absent a full day or part of a day.

Chart 20-1

**High School Dropout Rates
Selected Communities by 1996 Population
FY93 - FY97**

Community	FY93	FY94	FY95	FY96	FY97
North Attleborough	2.9%	2.6%	4.3%	2.3%	4.7%
Dedham	0.8%	3.0%	3.8%	1.3%	3.8%
West Springfield	4.2%	3.9%	3.8%	3.5%	3.7%
Milford	2.1%	3.7%	3.2%	2.0%	2.8%
North Andover	1.0%	1.2%	1.1%	3.2%	1.7%
Marshfield	5.0%	1.7%	1.6%	1.3%	1.6%
Reading	2.5%	1.7%	0.9%	1.3%	1.5%
Burlington	0.4%	1.3%	0.3%	1.0%	1.5%
Danvers	0.9%	2.1%	1.7%	2.9%	1.4%
Milton	0.1%	1.1%	0.9%	1.0%	1.1%
Easton	0.6%	0.7%	1.1%	0.8%	0.8%
Belmont	0.5%	0.5%	0.7%	1.4%	0.8%
Stoneham	0.9%	0.8%	0.5%	0.6%	0.6%
Walpole	0.5%	0.4%	1.2%	1.3%	0.5%
Wakefield	2.9%	2.3%	1.2%	3.3%	0.5%
Average These Communities	1.7%	1.8%	1.8%	1.8%	1.8%
Median These Communities	0.9%	1.7%	1.2%	1.3%	1.5%
State Average	3.5%	3.7%	3.6%	3.4%	3.4%

Note: Data provided by DOE

21. Maintenance and Capital Improvement

Maintenance

BPS has two processes for maintenance. The high school and the middle school are cleaned and maintained by a contractor (S.J. Services, Inc.). Custodians employed by BPS maintain the four elementary schools. These custodians have a dual reporting relationship. They report to both the school principal and the supervisor of buildings and grounds. All work of the contractor must meet the approval of the supervisor of buildings and grounds. Details of the contract with S.J. Services, Inc. are discussed in Section 16 Review of Expenditures. The audit team visited four of the six schools and found them to be clean and extremely well maintained.

Capital Improvement

The town has a Capital Budget Committee, which submits an annual report to the town meeting. The report covers a five-year period, starting with the current fiscal

year. The town funded a new middle school in 1995 (the old school was destroyed by fire) and renovations to two elementary schools with \$20,705,000 of long term debt. The district receives a 60 percent reimbursement from the School Building Assistance Board (SBAB) that represents a \$1 million annual payment. The payments on this debt were excluded from the levy limit by a vote of the town, this debt exclusion is net of the SBAB reimbursement. The town plans to spend \$2.8 million on capital improvements in the schools for FY00 to FY05. In addition, the town will spend \$2 million on its athletic complex and a roof repair program of \$1.9 million, which includes the schools.

In 1994, the state passed special legislation that allowed the establishment of a Capital Endowment Fund. When the fund was established, the balance represented the proceeds from the sale of the town's interest in the cable television system that was sold to a private firm. The initial capitalization of this fund was \$2.7 million. The net income of this fund may be appropriated for operating expenses and the principal may be appropriated by a 2/3's vote of the town meeting. The balance in this fund as of 11/30/96 was \$2.1 million. The town voted a \$2 million override for solid waste collection and disposal. \$500,000 was appropriated in the FY98 operating budget for the wiring of the schools for technology.

22. School Improvement Planning

The Superintendent and school committee developed and approved a process by which school councils would be established at each school within the district. The process, "Guidelines and Procedures for School Councils," requires that each council have four parent and three teacher representatives as well as the principal and two to four community members. Beginning this year, the district also invites a parent of a Boston student (METCO) to participate on each council. Parents are chosen through an election conducted by the school's PTA. To fulfill the requirement for community participation, each principal recruits members from local businesses and community organizations.

A review of the membership of the district's 1998-1999 school councils indicates that all of the schools except the high school had the numbers of parent and teacher representatives prescribed by the district policy. The high school membership consisted of the principal, a co-chairperson whose position was not indicated, a teacher, two parents, one community member, and two students. Also, only half of the councils had two to four community members.

The term of office for a council member is generally two years and terms are staggered to assure continuity. Interviews indicate that the councils are generally representative of the student population. School councils meet at least four to six times a year, with several of the councils meeting more often.

In accordance with the district's "Guidelines and Procedures for School Councils", each school improvement plan must be aligned with appropriate goals of the

Belmont Public Schools' strategic plan; must include student performance standards adopted by the Massachusetts Board of Education; and must be consistent with the standards and goals established by the Superintendent and the school committee. The school improvement plan for each school consists of a set of goals for the year. The school improvement plans do not describe the process by which the council determined the needs of the school, the people involved in these processes, or a justification for the goals. The school improvement plans generally consist of two to twelve broad goals, which are developed by members of the school council and are based on the recommendations of the principal. It was noted that the high school plan consists of only one goal related to facility renovation. Many of the plans contain broad goals, but do not indicate specific activities that the schools will engage in to ensure that these goals will be met.

Council members stated that they annually review the school budget. The process was most often described as the principal bringing the budget to the council after it was set by the administration. Interviews indicate that school council members are not actively participating in the development of a building-based budget.

Council members indicated that they use the results of standardized testing, including MCAS, and information from the curriculum review cycles to determine the needs of the students in their schools. Further, the process used to develop the school improvement plans includes brainstorming sessions, feedback on goals drafted by the principal and small groups or committees.

Each year in the spring, a district-wide meeting is held including administrators, staff, school committee members, school council members, and community members at which implementation of the district's strategic plan is reviewed and education improvement goals are set for the next year. It is expected that all of the schools' improvement goals will fit under goals contained in the district Education Improvement Plan. School improvement plans are annually presented to the school committee for approval every fall. School improvement goals are then incorporated into the district Educational Improvement Plan. Interviews with council members indicate school councils evaluate the implementation of their goals regularly. The implementation of all goals in the district Educational Improvement Plan is evaluated annually by the administration; that evaluation is presented to the school committee for review in June.

23. Student Learning Time

The school committee annually establishes the calendar for the school year, which includes 185 days. Students are scheduled to attend 180 days and teachers are scheduled for 183 days. Interviews indicate that school councils do not discuss the school schedule. The school committee in consultation with the administration sets the calendar. All elementary students in the district receive a minimum of 900 hours of structured learning time. Changes were made at the elementary level in the arrival time and the recess schedule to increase student learning time. All middle school

students receive a minimum of 900 hours of structured learning time. No changes were necessary in the middle school schedule to provide the minimum number of hours. In order to reach the 990-hour requirement, the high school lengthened the school day by 25 minutes, modified the instruction blocks, and eliminated study halls. However, in order to receive 990 hours of structured learning time, a student must enroll in six courses, which do not alone provide the total 990 hours, and also participate in other activities chosen from a list in the student handbook to make-up the shortage of required hours. The activities listed in the student handbook as possible ways for students to make-up structured learning time hours include community service, directed studies, clubs, and other activities which are not considered allowable elements pursuant to the guidelines disseminated by the Department of Education in August, 1999.

24. Personnel Evaluations

The district has established a comprehensive and rigorous evaluation system for all teachers, principals, and administrators using the principles of evaluation established by the Board of Education. The Belmont School Committee has not established supplemental standards for teachers at this time.

The Superintendent is evaluated annually by the school committee using a goal setting and attainment process similar to that used with principals. Goals are mutually set between the Superintendent and the school committee in June with a mid-year review on progress and a report by the Superintendent in May. The school committee develops commendations and recommendations, which are presented publicly in June.

Administrators are evaluated annually by the Assistant Superintendent of Schools. The review of a sample of administrator evaluations indicates that the Principles of Effective Administrative Leadership are being used to evaluate administrators. The evaluations identified areas of strength as well as areas needing improvement. The evaluation of administrators includes goal setting which is done in separate meetings with the Superintendent and the Assistant Superintendent in the fall. The Assistant Superintendent has a mid-year status conference with each administrator to review progress on meeting goals in addition to completing a yearly comprehensive evaluation. The Assistant Superintendent composes a draft summative report and discusses it with the administrator at the end of the school year, after which a final report is prepared. Salary increases for administrators are tied to their performance evaluation.

However, the current collective bargaining agreement (1996-1999) does not include the standards or describe the evaluation process that is in fact being followed. The district indicates that both the Principles of Effective Administrative Leadership and the process by which administrators will be evaluated will be incorporated into the new agreement currently being negotiated.

The Superintendent evaluates the principals based upon the Principles of Effective Administrative Leadership. Their evaluations are based on their individual goals, goals from the school improvement plans, and district goals. Goals are reviewed annually with the Superintendent. A written evaluation is provided before the end of the school year. A review of sample evaluations indicates consistency in the identification of strengths as well as areas needing improvement and reflects careful observation of individual performance within the school and community at large. The percent of salary increase for principals is also tied to performance evaluations.

The collective bargaining agreement for teachers, adopted in 1998, clearly describes the policies and procedures, standards and components of the evaluation process. Teachers with professional status: The district has implemented a four-year performance evaluation cycle for teachers with professional status with specific activities each year.

In Year 1, the teacher writes an individual professional development plan (PDP), covering long-term goals for four years as well as short term goals for the school year. The teacher and the evaluator hold a conference to discuss and approve the plan. Teachers document the status of their progress toward the goals and share this documentation with their evaluator at the end of the first year.

In Year 2, the teacher and the evaluator hold a pre-observation conference to discuss the status of the PDP, to review and update the short-term goals, and to set a date for the observation. The evaluator conducts the observation and completes an evaluation checklist which consists of the Principles of Effective Teaching. The teacher and evaluator hold a post-observation conference to review and discuss the evaluation. The teacher submits a professional development summary, a written summary of progress toward the goals of the PDP, at the end of that school year.

In Year 3, the teacher and the evaluator hold a conference within the first semester of the school year to review the teacher's long-range PDP and to discuss and agree to short term goals for Year 3. The teacher submits a professional development summary to the evaluator at the end of the school year.

In Year 4, the teacher and the evaluator hold a conference by October 15th to discuss and agree on the teacher's goals and review and schedule this year's evaluation. During the year, the evaluator documents the teacher's progress through at least two formal observations and by use of other relevant information. The teacher's professional development summary must be submitted by April 15th. The evaluator writes a comprehensive evaluation that is discussed with the teacher at a year-end conference at the beginning of June.

The Belmont Public Schools uses a two-tiered process for teachers with professional status who are not meeting the criteria of the Principles of Effective Teaching. At any point during the evaluation cycle an evaluator may determine that the teacher should be placed on a plan of assistance, specifically designed to address areas of needed

improvement. Should the teacher fail to meet the criteria for improvement in the plan of assistance, then they are placed on reservation. A remediation plan is developed for a minimum of 180 school days, at which time a written comprehensive evaluation is completed. A teacher whose performance fails to meet the criteria established in the remediation plan may be subject to personnel action.

Supports available to teachers to improve their performance consist of professional development in their area of need, peer mentoring, frequent meetings with the principal to review proposed lesson plans, and observations of other teachers conducting similar lessons.

Teachers without professional teacher status: For teachers without professional teacher status, a comprehensive evaluation is completed every year similar to that in Year 4 of the professional teacher evaluation cycle. A pre-evaluation conference must occur prior to October 1st. The evaluation includes three formal observations including pre-observation and post-observation conferences, a written report of each observation and a written evaluation report. Two of the formal observations must be completed by January. The evaluator's comprehensive evaluation report must be signed by the principal, who must provide a recommendation regarding the reappointment of the teacher. The final evaluation conference between the evaluator and the teacher to review the evaluation report must be completed by June 1st.

The review of a sample of teacher evaluations indicates that evaluation reports identify areas of strength and provide recommendations and clear direction for areas needing improvement. The Principles of Effective Teaching not only appear in the checklist used for observations but are also included in the written evaluation, thus allowing the evaluator to make comments on the teacher's competencies, which are not based solely on observation.

The district has provided ongoing training for principals and administrators through Jon Saphier's "Training in Supervision and Evaluation." The district is now in its fourth year of consultation from Saphier's Research for Better Teaching, which has enabled the district to develop a common vision of what evaluation should look like when it is done well. This training has included four half-day sessions per year as well as summer institutes at which local implementation issues and the quality of the evaluations are reviewed. Videotapes are used during the summer institutes to practice writing up teacher observations and critiquing these write-ups. In addition, the assistant superintendent and superintendent read every evaluation of every staff person completed in a given year. These practices promote consistency and uniformity of quality in the district's final evaluation reports.

To ensure that evaluators have expertise in the area to be evaluated, the district uses a dual system of supervision and evaluation including a coordinating and a contributing evaluator. Contributing and coordinating evaluators are drawn from a pool consisting of principals, assistant principals, curriculum coordinators, and the director of student services.

25. Professional Development

The district has a comprehensive professional development plan which is focused on district goals. The “Staff Development Plan” includes in-service training to implement goals drawn from the district’s Educational Improvement Plan, goals established by curriculum department steering committees, and goals established by individual schools. The district provides many opportunities for staff to attend a wide range of professional development offerings. Optional training sessions are provided by the district on topics which reinforce district goals. In addition, the district belongs to a collaborative which offers training to assist staff in meeting their individual professional development goals. It also belongs to the Teachers as Scholars program at Harvard University and the New England China Network. Vouchers are offered to teachers in exchange for having a student teacher in the classroom, and some reimbursement is available for tuition for outside professional development offerings. The “plan” also includes alternate avenues of professional development such as independent study, study groups, and mentoring opportunities.

The “Staff Development Plan” is developed by the Staff Development Council, consisting of teachers from every level and every discipline, administrators, and the curriculum coordinators from every discipline. The council meets four times a year. It is the responsibility of the representatives on the Staff Development Council to poll the teachers in each building for recommendations regarding professional development needs.

The district’s professional development course offerings include all of the suggested areas of professional development except for parent and community support and involvement. The “plan” does not include training for school council members. Professional development offerings are guided by district needs and by curriculum development needs as determined by the curriculum steering committees. Mandatory professional development in the district consists of one full day and two half days at the elementary level, two full days and one half day at the middle school level, two full days and two half days at the high school level, and after-school staff meetings on “Curriculum Mondays” from four to six times per year dependent upon grade level.

Interviews indicate a high degree of participation by staff in the district’s professional development offerings. However, the district did not provide data on the extent of this participation or analysis of progress made toward professional development objectives.

26. Curriculum Development

The Belmont Public Schools began the process of curriculum reform, well in advance of the development of the curriculum frameworks, by following national standards, such as the National Council for Teaching in Mathematics (NCTM). This early work enabled the district to align with the curriculum frameworks, particularly in the areas

of math and science with minor adjustments. Steering committees have been established for every major curricula area, composed of teacher representation from each school in the district, parents, and administration. These steering committees were critical in establishing benchmarks for what every student should know at each level aligned with the curriculum frameworks. The process of alignment proceeded from steering committees to department meetings, grade level meetings and building meetings. The focus was to familiarize staff with the frameworks and to identify any gaps in the district's curriculum. According to the district, the curriculum frameworks provided a lot of leverage around issues of continuity and consistency. During early release days, staff began to focus on assessment by choosing a standard and then examining how to measure it and how to use the information to inform teaching. This process led to the development of rubrics to guide teachers in examining student work, to be able to know what students have learned and to know what student work products should look like when done well. Another key feature of the district's alignment initiative was to make this information available to parents in a comprehensible way.

27. Assessment of Student Progress

The Belmont Public Schools makes extensive use of student assessment data, both state and locally mandated, in order to identify gaps in student learning and to guide curriculum development and inform classroom instructional practice. The district administers the ERB in grades 3, 5, 7 and 9, which compliments MCAS assessments in grades 4, 8 and 10. Both assessments yield individual scores, which enable the district to bring their analysis of student performance down to the classroom level. In addition, the district analyzes SAT and achievement results at the high school level. Sub-score analysis is done on the district level by the curriculum coordinators with the Assistant Superintendent and then shared at department meetings with teachers. Preparations are also made for forums to report out results to parents. Individual item analysis on a student by student basis is done at the building level by principals with specific groups of teachers at various grade levels. Student assessment outcomes are disaggregated in order to examine how different groups of students are performing and shared with building principals. The district takes specific action to develop appropriate instructional supports in response to the under-performance of any student group. Spring and summer clinics were offered to seventh and eighth grade students in Math and English, with follow-up mentoring by curriculum coordinators during the school year. MCAS results have been used to shape curriculum review, as with the fourth grade scores that led to staff development around reading comprehension strategies or validate curriculum direction, as with the integrated approach to science at the ninth grade.

IV. Employee Survey

The audit team conducted a confidential survey of all employees of BPS to provide a forum for teachers and staff to express their opinions on education in BPS. Approximately 304 questionnaires were delivered to school staff and 92 responses

were received and tabulated, a response rate of 30 percent. Areas covered by the survey include:

1. education reform
2. education goals and objectives
3. curriculum
4. planning
5. communications and mission statements
6. budget process
7. professional development
8. supplies
9. facilities
10. computers and other education technology

Appendix E shows the teachers' answers to the survey questions. The Superintendent also received a summary of responses.

The survey results indicate that education reform is taken seriously in Belmont. Eighty-two percent of teachers think that education reform issues are considered when their own school plans are made and 85 percent think that also applies to district-wide plans. Ninety percent believe that the school district is taking positive steps to improve education and 59 percent state that their job has changed because of education reform.

Eighty-seven percent of teachers are clear about the school district's goals and objectives and 85 percent are clear about how the school district's goals and objectives relate to their own jobs. Sixty-nine percent feel that they have a role in the development of these goals and objectives and 81 percent confirm that there are indicators used to measure progress toward them.

The survey indicates that 19 percent of teachers do not think that an increase in school funding is tied directly to improvements in education. Sixty-four percent of teachers think that improvements in education at the school would have occurred without education reform.

Eighty-nine percent believe that the curriculum is coherent and sequential. Sixty-eight percent believe that the curriculum now in use in their school will improve student test scores while 4 percent said that it would not. Eighty-nine percent of the teachers feel that there is a coherent, on-going effort within BPS to keep curriculum current and 83 percent feel that teachers play an important role in reviewing and revising the curriculum. Seventy-four percent feel that the curriculum does not impact test scores as much as how a subject is taught by a teacher.

V. Superintendent's Statement – Education Reform

As part of this review, the Superintendent was asked to submit a brief statement expressing his point of view with respect to three areas:

1. school district progress and education reform since 1993
2. barriers to education reform
3. plans over the next three to five years

The Superintendent's statement is included in *Appendix F*.

VI. Appendix

Appendix A1	School Committee Budgets
Appendix A2	Budgeted Teachers' Salaries by Selected Discipline
Appendix B1	Foundation Budget Line Items Targets and Expenditures FY94, FY96- FY98 - Table
Appendix B2 - 3	Foundation Budget Line Items Targets and Expenditures FY94, FY96-FY98 - Graph
Appendix C	Mass. Educational Assessment Program (MEAP) Summary prepared by DOE
Appendix D	Comparison of MCAS Average Scaled Scores
Appendix E	Employee Survey Results
Appendix F	Superintendent's Statement on Education Reform Accomplishments, Barriers and Goals

Belmont Public Schools
School Committee Budgets

Category		FY89 - FY93				FY93 - FY98			
		FY89	FY93	\$ Incr.	% Incr.	FY95	FY98	\$ Incr.	% Incr.
1000	1100 School Committee	\$58,333	\$78,543	\$20,210	34.6%	\$91,291	\$103,985	\$25,442	32.4%
	1200 Superintendent's Office	\$459,291	\$476,614	\$17,323	3.8%	\$478,823	\$513,996	\$37,382	7.8%
2000	2100 Supervision	\$489,421	\$524,892	\$35,471	7.2%	\$360,650	\$501,566	(\$23,326)	-4.4%
	2200 Principals	\$795,588	\$893,517	\$97,929	12.3%	\$910,218	\$1,124,968	\$231,451	25.9%
	2300 Teaching	\$7,273,643	\$8,401,051	\$1,127,408	15.5%	\$9,497,248	\$10,769,165	\$2,368,114	28.2%
	2350 Professional Development	\$0	\$0	\$0	0.0%	\$0	\$53,450	\$53,450	-
	2400 Textbooks	\$82,830	\$88,495	\$5,665	6.8%	\$85,863	\$169,921	\$81,426	92.0%
	2500 Libraries	\$329,395	\$386,975	\$57,580	17.5%	\$380,408	\$351,531	(\$35,444)	-9.2%
	2600 Instructional Media	\$94,243	\$14,410	(\$79,833)	-84.7%	\$28,547	\$13,485	(\$925)	-6.4%
	2700 Guidance	\$479,001	\$519,600	\$40,599	8.5%	\$551,436	\$523,884	\$4,284	0.8%
	2800 Psychological Services	\$1,340,783	\$1,651,943	\$311,160	23.2%	\$1,663,131	\$2,192,273	\$540,330	32.7%
	2900 Educational Television	\$0	\$0	\$0	0.0%	\$0	\$1,000	\$1,000	-
3000	3100 Attendance	\$2,700	\$0	(\$2,700)	-100.0%	\$0	\$0	\$0	-
	3200 Health	\$79,464	\$109,247	\$29,783	37.5%	\$122,110	\$128,066	\$18,819	17.2%
	3310 Transportation	\$411,000	\$304,000	(\$107,000)	-26.0%	\$292,767	\$346,600	\$42,600	14.0%
	3510 Athletics	\$219,671	\$232,257	\$12,586	5.7%	\$169,151	\$207,446	(\$24,811)	-10.7%
	3520 Student Body Activities	\$66,269	\$60,798	(\$5,471)	-8.3%	\$61,305	\$79,905	\$19,107	31.4%
4000	4110 Custodial Services	\$747,160	\$805,083	\$57,923	7.8%	\$795,442	\$889,904	\$84,821	10.5%
	4120 Fuel	\$208,246	\$181,500	(\$26,746)	-12.8%	\$188,950	\$165,050	(\$16,450)	-9.1%
	4130 Utilities	\$289,095	\$495,925	\$206,830	71.5%	\$409,675	\$383,328	(\$112,597)	-22.7%
	4210 Maintenance - Grounds	\$11,750	\$0	(\$11,750)	-100.0%	\$0	\$6,000	\$6,000	-
	4220 Maintenance - Buildings	\$400,735	\$332,996	(\$67,739)	-16.9%	\$332,996	\$351,500	\$18,504	5.6%
	4230 Maintenance of Equipment	\$101,500	\$97,900	(\$3,600)	-3.5%	\$88,528	\$100,850	\$2,950	3.0%
	4240 Replacement of Non-Instructional Equip.	\$68,699	\$65,900	(\$2,799)	-4.1%	\$65,900	\$0	(\$65,900)	-100.0%
7000	7300 Acquisition of Additional Equipment	\$28,665	\$26,200	(\$2,465)	-8.6%	\$0	\$11,100	(\$15,100)	-57.6%
	7400 Replacement of Equipment - Inst.	\$19,865	\$20,555	\$690	3.5%	\$0	\$7,875	(\$12,680)	-61.7%
9000	Programs with other districts	\$570,150	\$610,700	\$40,550	7.1%	\$824,527	\$937,600	\$326,900	53.5%
	Relocation costs	\$123,920	\$0	(\$123,920)	-100.0%	\$0	\$0	\$0	-
	Fringe Benefits	\$0	\$1,179,472	\$1,179,472	0.0%	\$1,335,776	\$1,836,842	\$657,370	55.7%
	Additional Non-Appropriation	\$0	\$0	\$0	0.0%	\$0	\$110,000	\$110,000	-
Total		\$14,751,417	\$17,558,573	\$2,807,156	19.0%	\$18,734,742	\$21,881,290	\$4,322,717	24.6%

Note: Data obtained from BPS and the town of Belmont.

Belmont Public Schools
Budgeted Teaching Salaries By Selected Discipline
(in thousands of dollars)

Discipline	FY93	FY95	FY98	FY93 - FY98	
				\$ Incr.	% Incr.
Art	\$265	\$294	\$323	58	22%
Music	\$329	\$377	\$439	110	33%
Physical Education	\$351	\$340	\$374	23	7%
Elementary	\$3,042	\$3,802	\$3,269	227	7%
Grade 5	N/A	N/A	\$698	N/A	N/A
Grade 6	\$445	\$444	N/A	N/A	N/A
English	\$612	\$615	\$839	227	37%
Math	\$610	\$638	\$895	285	47%
Science	\$619	\$635	\$983	364	59%
Social Studies	\$632	\$632	\$927	295	47%
Business Education	\$112	\$103	\$12	(100)	-89%
Tech Education	\$0	\$0	\$166	166	N/A
Home Economics	\$125	\$104	\$59	(66)	-53%
Industrial Arts	\$114	\$135	\$20	(94)	-82%
Health	\$86	\$67	\$91	5	6%
Reading	\$70	\$101	\$339	269	N/A
Foreign Language	\$398	\$453	\$524	126	32%
SPED	\$1,170	\$1,139	\$1,318	148	13%

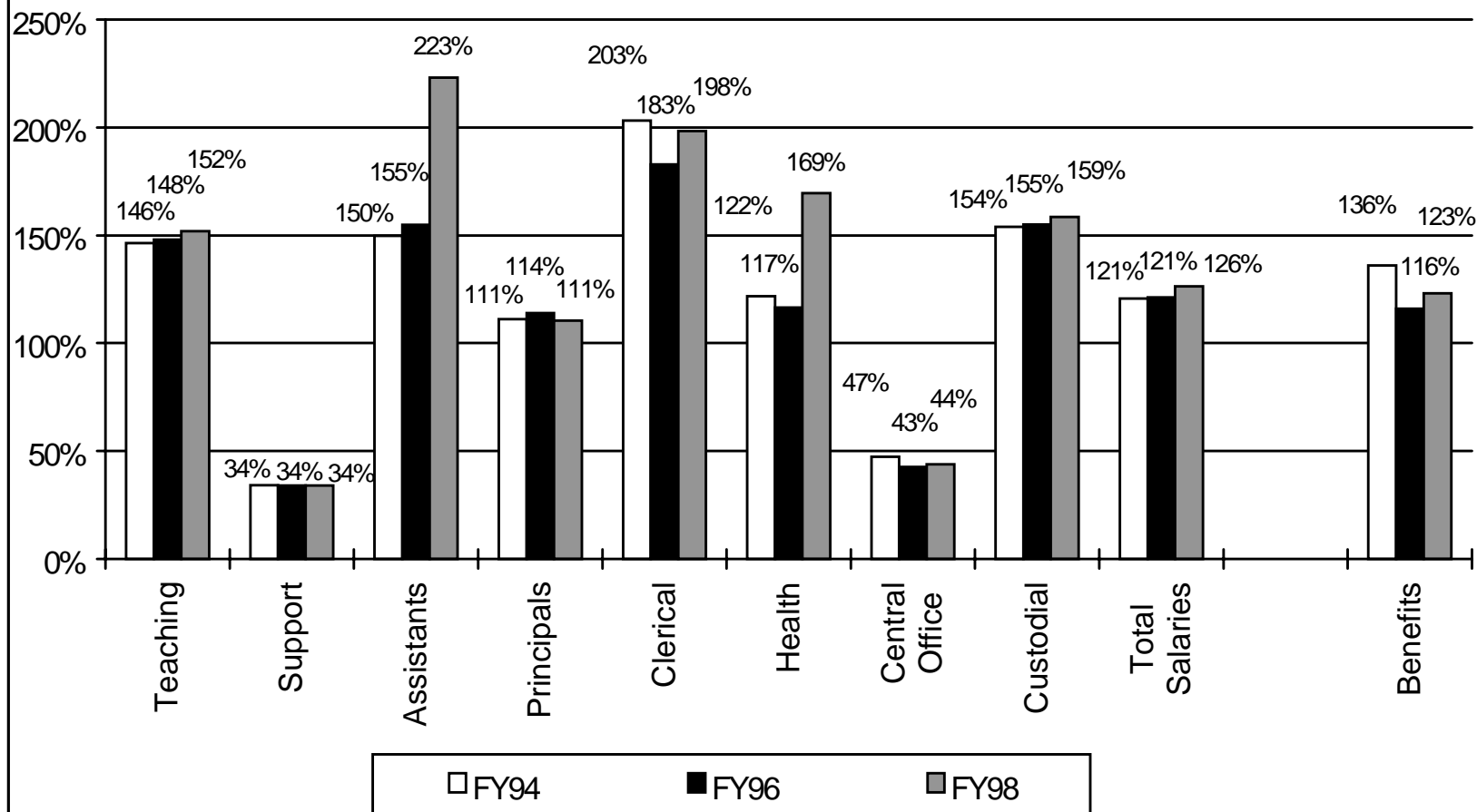
Note: Data obtained from BPS. Kindergarten included in elementary.

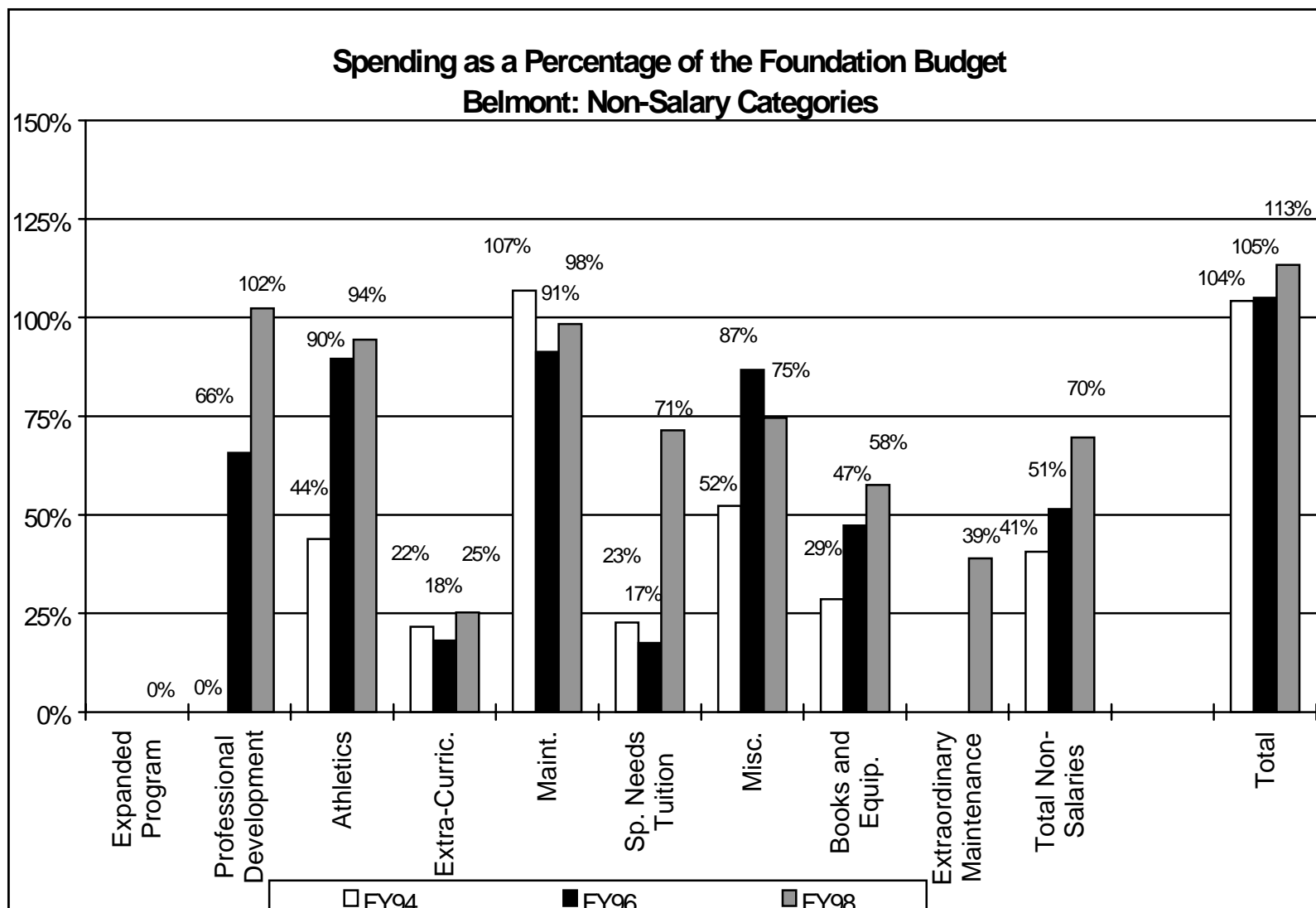
Belmont Public Schools
Net School Spending According to Foundation Budget Categories
(in thousands of dollars)

	Reported Expenditures			Foundation Budget			Variance			
	FY94	FY96	FY98	FY94	FY96	FY98	Expend. over(under) Foundation	FY94	FY96	FY98
Teaching Salaries	\$9,848	\$10,610	\$11,685	\$5,851	\$6,915	\$7,317	\$3,997	\$3,695	\$4,368	
Support Salaries	\$890	\$859	\$772	\$1,828	\$2,170	\$2,282	(\$938)	(\$1,311)	(\$1,510)	
Assistants' Salaries	\$554	\$672	\$773	\$286	\$343	\$344	\$268	\$329	\$429	
Principals' Salaries	\$648	\$644	\$806	\$578	\$674	\$714	\$69	(\$31)	\$91	
Clerical Salaries	\$687	\$627	\$705	\$340	\$398	\$418	\$347	\$229	\$286	
Health Salaries	\$117	\$117	\$137	\$126	\$148	\$154	(\$9)	(\$32)	(\$17)	
Central Office Salaries	\$355	\$313	\$266	\$547	\$640	\$674	(\$193)	(\$328)	(\$408)	
Custodial Salaries	\$546	\$550	\$690	\$505	\$598	\$632	\$41	(\$48)	\$59	
Total Salaries	\$13,645	\$14,390	\$15,834	\$10,062	\$11,886	\$12,535	\$3,583	\$2,504	\$3,299	
Benefits	\$1,725	\$1,917	\$1,969	\$1,404	\$1,661	\$1,745	\$321	\$255	\$224	
Expanded Program	\$0	\$0	\$0	\$36	\$80	\$87	(\$36)	(\$80)	(\$87)	
Professional Development	\$81	\$170	\$268	\$230	\$273	\$288	(\$150)	(\$103)	(\$20)	
Athletics	\$165	\$190	\$227	\$184	\$198	\$230	(\$19)	(\$8)	(\$3)	
Extra-Curricular	\$52	\$58	\$91	\$88	\$98	\$110	(\$36)	(\$40)	(\$19)	
Maintenance	\$1,260	\$1,349	\$1,265	\$652	\$769	\$816	\$608	\$580	\$449	
Special Needs Tuition	\$834	\$930	\$1,017	\$378	\$439	\$475	\$456	\$492	\$542	
Miscellaneous	\$167	\$666	\$507	\$269	\$314	\$332	(\$102)	\$352	\$174	
Books and Equipment	\$517	\$1,112	\$949	\$835	\$963	\$1,030	(\$318)	\$149	(\$80)	
Extraordinary Maintenance	\$0	\$0	\$61	\$435	\$513	\$544	(\$435)	(\$513)	(\$483)	
Total Non-Salaries	\$3,075	\$4,475	\$4,385	\$3,107	\$3,646	\$3,913	(\$32)	\$829	\$472	
Total	\$18,445	\$20,782	\$22,188	\$14,573	\$17,194	\$18,194	\$3,872	\$3,588	\$3,995	
Revenues		\$0	\$0	\$0	\$0	\$0	\$0.0	\$0	\$0	
Net School Spending	\$18,445	\$20,782	\$22,188	\$14,573	\$17,194	\$18,194	\$3,872	\$3,588	\$3,995	

Note: Data obtained from DOE and BPS. Totals may not add due to rounding.

Spending as a Percentage of the Foundation Budget Belmont: Salaries and Benefits





Belmont Public Schools
Massachusetts Educational Assessment Program (MEAP) Scores

	Grade	1988	1990	1992	1994	1996	1988-96 Change	1996 State Average	1996 BPS Over/(Under) State Avg.
Reading									
	4	1430	1440	1420	1480	1470	40	1350	120
	8	1420	1510	1450	1500	1550	130	1380	170
	10	N/A	N/A	N/A	1410	1460		1310	150
Math									
	4	1450	1490	1430	1440	1440	-10	1330	110
	8	1450	1500	1510	1480	1490	40	1330	160
	10	N/A	N/A	N/A	1420	1460		1310	150
Science									
	4	1410	1430	1420	1430	1450	40	1360	90
	8	1480	1480	1470	1450	1540	60	1330	210
	10	N/A	N/A	N/A	1410	1450		1310	140
Social Studies									
	4	1430	1450	1410	1410	1440	10	1340	100
	8	1490	1490	1450	1440	1450	-40	1320	130
	10	N/A	N/A	N/A	1420	1420		1300	120

Note: N/A indicates that test was not given to all grades in all years. Data obtained from DOE

Belmont Public Schools
1998 and 1999 MCAS Test Scores
Percentage of Students at Each Performance Level

Grade:	Subject	Year	Average Scaled Score	Advanced	Proficient	Needs Improve- ment	Failing (Tested)	Failing (Absent)
4								
	English Lang.	1999	238	1	38	58	2	1
	Arts	1998	237	4	34	58	5	0
	Mathematics	1999	249	39	32	24	5	1
		1998	246	30	35	28	7	0
	Science and Technology	1999	247	17	60	20	2	1
		1998	245	16	54	26	3	0
8								
	English Lang.	1999	246	9	69	19	3	0
	Arts	1998	245	5	75	17	3	0
	Mathematics	1999	241	15	44	26	15	0
		1998	227	20	41	23	16	0
	Science and Technology	1999	238	20	33	23	24	0
		1998	239	5	49	31	14	0
	History	1999	232	4	28	45	22	0
		1998	N/A	N/A	N/A	N/A	N/A	N/A
10								
	English Lang.	1999	246	21	50	24	5	0
	Arts	1998	246	20	54	20	5	1
	Mathematics	1999	243	29	27	23	20	1
		1998	245	31	37	18	13	1
	Science and Technology	1999	239	12	43	32	12	1
		1998	240	5	55	31	9	1

Note: Data provided by DOE

EMPLOYEE SURVEY - Belmont

Teachers

(n=75)

Note: Percentages may not add to
100% due to rounding

Rating Scale		
Yes/No Questions		Opinion
yes	1&2	Good to Excellent
No	4 & 5	Not good, inadequate
Not sure, one way or the other	3	OK - could be better, could be worse

1	Education Reform	1&2	4 & 5	3
1.a.	Are you familiar with the issues of Education Reform, the Law passed in 1993?	88%	3%	9%
1.b.	Do you feel you have a good understanding of the purpose and the goals of the law?	89%	4%	7%
1.c.	Do you feel that there is a lot of confusion about what Education Reform is all about?	59%	24%	16%
1.d.	Do you feel the issues of Education Reform are considered when school district plans are made?	85%	3%	12%
1.e.	Do you feel the issues of Education Reform are considered when school-based plans are made?	82%	3%	15%
1.f.	In your opinion is the school district taking positive steps to improve education?	90%	7%	3%
1.g.	Do you feel your job has changed because of Education Reform?	59%	22%	19%
1.h.	Do you think there has been an improvement in student achievement in your school due to Education Reform?	37%	8%	55%
1.i.	Do you think the improvements in education at the school would have happened without Education Reform?	64%	4%	32%
1.j.	Have you perceived an increase in school funding tied directly to improvements in education in your district?	27%	19%	54%
1.k.	Is there a formalized process in place to analyze student test scores and identify areas of academic weakness?	67%	15%	19%
1.l.	Are there specific programs in place to improve student performance in areas where academic weaknesses have been identified?	65%	19%	16%

2	Educational Goals and Objectives	1&2	4 & 5	3
2.a.	Are the school administration's goals and objectives generally clear and understandable?	87%	9%	4%
2.b.	Are you clear about the school district's goals and objectives as they relate to your own job?	85%	7%	8%
2.c.	Are there indicators issued to measure progress toward goals and objectives generally?	71%	8%	21%
2.d.	Are there indicators used to measure your progress toward goals and objectives?	81%	8%	11%
2.e.	Do you have a role in developing these goals and objectives?	69%	19%	12%

EMPLOYEE SURVEY - Belmont

Teachers

(n=75)

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No	4 &5	Not good, inadequate
Not sure, one way or the other	3	OK - could be better, could be worse

3 Curriculum		1&2		4 &5		3
3.a.	Do you believe that your district's curriculum is coherent and sequential?	89%		4%		7%
3.b.	Do you believe that your curriculum is challenging and tied to preparing students for life after secondary school?	88%		4%		8%
3.c.	Is there a coherent, on-going effort within the district to keep curriculum current with evolving trends and best practices in pedagogy and educational research?	89%		4%		7%
3.d.	Do teachers play an important role in reviewing and revising curriculum in the district?	83%		7%		11%
3.e.	Will the curriculum now in use in your school improve student test scores?	68%		4%		28%
3.f.	Do you believe that the curriculum content does not impact test scores as much as how a subject is taught by a teacher?	74%		9%		16%
3.g.	Is the curriculum in your school aligned with the state frameworks?	96%		3%		1%

4 Planning		1&2		4 &5		3
4.a.	Is the planning for important issues (e.g. curriculum, budgetary, etc.) within the district a top-down process?	76%		7%		18%
4.a.1.	If the answer is "Definitely yes" (1) or "Generally yes" (2), is there an important role for teachers and professional staff in the planning process?	52%		26%		23%
4.b.	If staff does not have an important role in developing plans, are decisions made by the central office/school committee explained so that you can understand the basis for the decision/policy?	36%		24%		40%
4.c.	Are you familiar with the content of your school improvement plan?	77%		15%		8%
4.d.	Does the school improvement plan address the needs of students in your school?	68%		10%		22%
4.e.	Is the plan used to effect important changes in your school?	64%		11%		25%

EMPLOYEE SURVEY - Belmont

Teachers

(n=75)

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No	4 & 5	Not good, inadequate
Not sure, one way or the other	3	OK - could be better, could be worse

5 Communications and Mission Statement		1&2		4 & 5		3
5.a.	Is there adequate on-going communication between teachers and district administrators? In other words, do you think that you know what is going on in the district?	61%		21%		17%
5.b.	Is there adequate communication between you and your superiors?	64%		4%		7%
5.c.	Is there a mission statement in place for your school district?	89%		10%		22%
5.d.	Is there a mission statement in place for your school?	84%		7%		9%
5.e.	Does the mission statement define how the school is run, and how students are taught?	77%		7%		16%
5.f.	Are these mission statements applied in the operation of the school and the teaching of students?	65%		11%		24%

6 Budget Process		1&2		4 & 5		3
6.a.	Do you understand your school budget process?	48%		31%		21%
6.b.	Do you understand how the budget process impacts your department?	62%		19%		19%
6.c.	Is the school budgeting process fair and equitable?	39%		17%		44%
6.d.	Are budgetary needs solicited and adequately addressed in the budget process?	46%		18%		35%
6.e.	Once the budget is approved and implemented, does the allocation and use of funds match the publicly stated purposes?	49%		7%		44%
6.f.	Given the circumstances, the school department seems to be doing the best it can with in the school budget process.	59%		8%		33%
6.g.	Are there deficiencies in this process?	36%		27%		37%

7 Professional Development		1&2		4 & 5		3
7.a.	Is there an adequate professional development program in your school?	73%		16%		11%
7.b.	Is the program designed to meet school needs and tied to the new frameworks and assessments?	84%		8%		8%
7.c.	Is the program designed to change the content of pedagogy in classrooms?	68%		14%		18%
7.d.	Are there deficiencies in the professional development program?	43%		42%		15%
7.e.	Did you participate in the professional development program in 1997/98?	87%		13%		0%
7.f.	Professional development is making a difference and will improve education in my school district.	68%		11%		21%

EMPLOYEE SURVEY - Belmont

Teachers

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No	4 &5	Not good, inadequate
Not sure, one way or the other	3	OK - could be better, could be worse

8 Supplies		1&2		4 &5		3
8.a.	Have you generally received sufficient and appropriate supplies to do your job?	69%		19%		12%
8.b.	Have you generally received sufficient and appropriate basic educational supplies (e.g. chalk, paper, pens, pencils, etc.) to do your job?	75%		16%		9%
8.c.	Have you generally been supplied with a sufficient number of a current edition of textbooks?	70%		16%		14%
8.d.	Are students given a copy of these textbooks to keep at home during the year?	7%		84%		9%
8.e.	Have you generally been supplied with sufficient ancillary curriculum materials (e.g. current maps, lab supplies, videos, etc.)?	63%		19%		18%
8.f.	Is the process for obtaining supplies and materials effective, time sensitive and responsive to your classroom needs?	56%		23%		21%

9 Facilities		1&2		4 &5		3
9.a.	How would you rate the overall state of school facilities (e.g. cleanliness, security, maintenance, structural integrity)?	65%		19%		19%
9.b.	How would you rate the overall state of classrooms, labs, and other teaching rooms/areas?	57%		20%		20%
9.c.	How would you rate the overall state of the common areas (e.g. hallways, stairwells, and cafeteria)?	61%		26%		14%
9.d.	How would you rate the overall state of the areas outside of the building (e.g. playgrounds, walk-ways and grounds)?	73%		8%		19%
9.e.	Would you agree with the following statement: "The school administration makes an effort to provide a clean and safe working environment."	76%		9%		15%

EMPLOYEE SURVEY - Belmont

Teachers

(n=75)

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100% due to rounding

Rating Scale		
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No	4 &5	Not good, inadequate
Not sure, one way or the other	3	OK - could be better, could be worse

10 Computers and other Educational Technology		1&2		4 &5		3
10.a.	Are the usage of computers and other technological tools a significant part of the management practices at the school?	36%		36%		28%
10.b.	Are the usage of computers and other technological tools a significant part of the instructional practices at the school?	23%		55%		22%
10.c.	In terms of student usage, are computers generally available only in a computer laboratory setting or library/media center?	63%		26%		11%
10.d.	How many computers are located in your classroom?					
10.e.	Do you have a school computer provided for and dedicated for your usage?	44%		56%		0%
10.f.	Is there a school computer provided for and shared by you and other teachers?	68%		24%		8%
10.g.	Are there computers available for and used on a regular basis by students?	47%		43%		9%
10.h.	Is the number of available computers sufficient for the number of students?	18%		69%		13%
10.i.	Are the computers in good working order?	44%		37%		20%
10.j.	Are the software packages in the computers uniform and consistent with the instructional level to be provided?	32%		35%		35%
10.k.	Is there a policy or program providing for computer training for teachers on software and computers used by students?	31%		35%		31%

