



■ ■ ■ ■ **Hamilton-Wenham RSD**  
**FY 09 Level Services Budget &**  
**Strategic Plan Recommendations**

**School Committee Forum**  
**January 24, 2008**  
**7:00 PM Buker School**

# Three Important Considerations

## 1. Stakes are high

- Necessary for school district to remain viable

## 2. Consequences for everyone

- Our students: Need 21<sup>st</sup> century skills for global marketplace
- Return on investment: There is a direct relationship between property values and strong schools

## 3. True solutions are long term and beyond school district control

- Structural deficit at state level
- MA property tax structure – regressive
- Towns must find incremental revenue sources

# HWRSD Cost Savings: FY 04 – FY 09

<b>Fiscal Year</b>	<b>Special Education</b>	<b>Other</b>	<b>Total</b>
<b>2004</b>	<b>\$338,000</b>	<b>---</b>	<b>\$338,000</b>
<b>2005</b>	<b>\$114,000</b>	<b>---</b>	<b>\$114,000</b>
<b>2006</b>	<b>\$154,000</b>	<b>\$238,055</b>	<b>\$392,055</b>
<b>2007</b>	<b>\$277,300</b>	<b>---</b>	<b>\$277,300</b>
<b>2008</b>	<b>\$251,300</b>		<b>\$251,300</b>
<b><i>2009 proposed</i></b>	<b>\$ 57,300</b>	<b>\$178,236</b>	<b>\$ 235,536</b>
<b>Total</b>	<b>\$1,211,900</b>	<b>\$416,291</b>	<b>\$1,628,191</b>

## So where are we in the FY 09 budget process?

Category	Approx Increase	Status
Level Services	\$2,119,658	SC votes to commit to LS budget on 12.20.07
Strategic Plan	\$1,202,693	Evaluating Leadership Team recommendations and community input

**FY 09 Level Services = \$26,639,123**

# What is a level service budget ?

A ***Level Service Budget*** is the estimated cost required to deliver the same level of services for the next fiscal year (FY 09) as we had in the current (FY 08) fiscal year, including all contractual increases & economic factors that affect the cost of these level services.

It is a useful tool for understanding the starting line for FY 09 budget development and how economics affect the planning process even before changes to services are considered.

# FY 09 Major Budget Drivers (Level Services)

Driver	FY 09 Cost	\$ Change	% Change
Special Education*	\$7,016,045	\$1,284,844	22.4%
Utilities	\$935,449	\$112,744	13.7%
Pensions & Taxes^	\$800,947	\$77,206	10.7%
Insurances	\$2,669,280	\$253,330	10.5%
Salaries⊕	\$13,274,466	\$886,339	7.2%

\* *Instructional salaries, out-of-district tuition, contracted services, and transportation*

^ *Essex County Retirement & Social Security; Teacher Retirement is self-funded*

⊕ *All salaries: instructional (regular education), support, administrative, and stipends*

**FY 09 Level Service Budget - \$26,639,123**

## **FY 09 Level Service Budget - \$ 26,639,123**

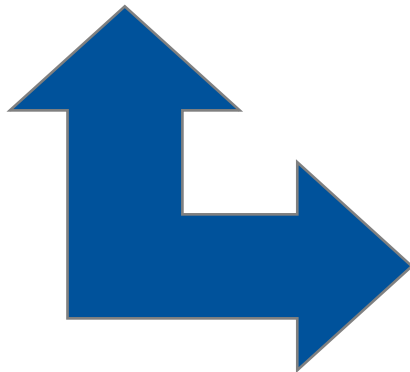
- **Level service budget includes FY 08 SOS funded positions:**
  - Cutler Teacher (1.0 FTE)
  - Teaching Assistants (2.0 FTE)
- **Other FY 08 SOS funded positions are not included in FY 09 level services budget due to decreases in enrollment and increases in middle school teaching assignments.**

# Issues to Consider: Compliance

Incremental investments required by:

- NEASC (High School Accreditation)
- Department of Education Coordinated Review (CR)

Level Services includes  
Special Education  
Compliance (C) of  
\$387,022



C	0.3	Preschool Chair (W)
C	1.0	Reading Specialist (HS)
C	1.3	Reg. Nurses (W & HS)
C	0.6	Psychologist (MS & D)
C	2.0	Teaching Assistants (W)
C	0.2	Physical Therapist (D)
C	0.4	Spch/Lang. Therapist (D)
C	0.5	Occup. Therapist (D)
CR	1.0	SPED A1 Skills (HS)
CR	1.0	Perm. Substitute (HS)
CR		Secretarial Support (Schs & D)

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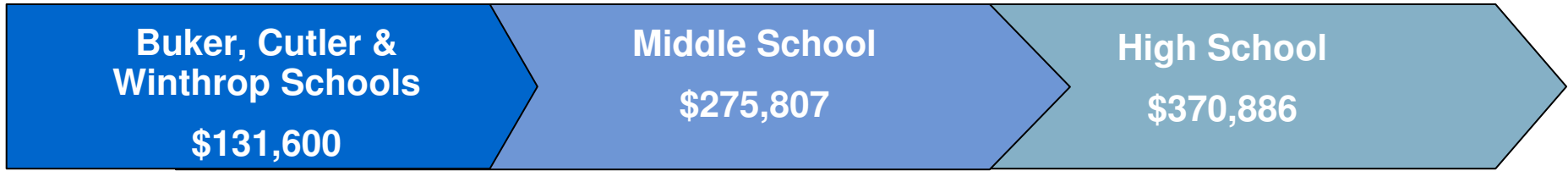
**FY 09 Level Services = \$26,639,123**

# Strategic Plan elements identified as priorities

- E, M, HS Teachers - Maintain class size & HS Electives (N)
- MS Foreign Language – MS Spanish, 5 days/week
- HS For. Lang. – Spanish + 2 (Latin/Fren/*Ger/Chin/Arabic*) (N)
- Instructional Technology (N)
- Alternative Program, Grades 6-7-8
- Reading/Writing Learning Disabilities Program, Gr. 4-6
- Support Staff – Elementary Adjustment Counselors, MS & District Psychologists (N); *HS Guidance*
- Support Staff - *MS & HS Custodians; HS Clerical*
- Lower athletic and extracurricular fees (N);

**N = Addresses NEASC citations & Strategic Plan**

# Strategic Plan Recommendations - \$1,202,693 1/2



- Adjustment Counselors (.2 per school)
- Media Specialist (.2 Buk)
- Summer Custodial
- Instructional Technology
- 20% Extracurricular Fees

- Spanish Teachers (1.2)
- Integrated Academic Teachers (Reading & Speech/Drama) (2.0)
- Library Aide (.5)
- Technician (.5)
- Summer Custodial
- Instructional Technology
- 20% Extracurricular Fees

- N** 3.2 Teachers (English, math, science, history, FL)
- N** Library Aide (.5)
- N** Technician (.5)
- Summer Custodial
- N** Instructional Technology
- N** \$50 Extracurricular Fees
- N** 20% Athletic Fees

**N = Addresses NEASC citations & Strategic Plan**

# Strategic Plan Recommendations - \$1,202,693 2/2

**Special Education**  
**\$297,782**

- **Grades 4-5 Intensive Reading/Language Program**
- **Grade 6 Intensive Reading & Language Program**
- **Grade 7 & 8 Alternative Program**

**District**  
**\$126,618**

- **Technology Infrastructure (Schs & D)**
- **Clerk – Data Entry (.5 - State Reports)**

# FY 09 *Preliminary* Budget

<b>Level Services budget</b>	<b>\$26,639,123</b>
<b><u>Strategic Plan recommendations</u></b>	<b>+ \$ 1,202,693</b>
<b>Gross expense budget</b>	<b>\$27,841,816</b>
<b><u>Non-town revenue</u></b>	<b>- \$ 4,792,889</b>
<b>Town funding needed for budget</b>	<b>\$23,048,927</b>
<b><u>Towns' contribution under levy *</u></b>	<b>- ???</b>
<b>Potential Override</b>	<b>\$ TBD</b>

*\* Expect to know by February 8*

# What happens next?

1/2

- **SC Fin Com presents preliminary FY 09 budget to H & W Finance Committees and Selectmen**  
**January 30 - 6:30 pm, Hamilton Safety Center**
- **H & W Fin. Chairs inform SC of contribution UNDER levy limit**  
**February 8**
- **SC Finance Subcommittee reviews FY 09 preliminary budget, decides on Strategic Plan elements to include in FY 09 budget, gauge community support, determine override**  
**February 11 – SC Finance Subcommittee, 6 pm, Supt. Office**
- **School Finance Subcommittee recommends a budget to full SC**  
**March 6 – 7 pm, Buker School**
- **SC Public Hearing – FY 09 Budget**  
**March 19 – 7 pm, Buker School**
- **SC votes FY 09 Budget**  
**March 31 – 6 pm, Buker School**

# What happens next?

2/2

- **FY 09 Budget Forums**
  - **FY 09 Budget *Connection***
  - **Towns/HWRSD Budget Forum**
  - **Wenham Town Meeting**
  - **Hamilton Town Meeting**
  - **Ballot Vote – Hamilton**
  - **Ballot Vote - Wenham**
- April TBD**
- April TBD; mailed to residents**
- May 1, 7 pm, Buker School**
- May 3, 2 pm, Buker School**
- May 5, 7:30 pm, HS Auditorium**
- May 15, 7 am – 8 pm, Winthrop School**
- May 15, 7 am – 8 pm, Buker School**

## **HWRSD Vision ... an excerpt**

*The HWRSD is committed to strong community relations efforts to meet the needs of Hamilton and Wenham today and in the future. The District develops and participates in partnerships with community groups including business and civic organizations.*

***There is an understanding between the town governments and the District of the need for educational funding and other resources required to meet the high expectations of the member communities*** which include staffing, training, technology, facilities, materials and equipment.

***Key to the success of this partnership is in each entity's ability to recognize opportunities and fulfill its responsibilities to one another on behalf of HWRSD students.***

***Mission: Educate our children to become knowledgeable, healthy, responsible and productive adults.***