



# *Needham School Committee*

*January 7, 2020*

*7:00 p.m.*

*Broadmeadow School  
School Committee Room*

*A school and community partnership that creates excited learners,  
inspires excellence, fosters integrity*

## **SCHOOL COMMITTEE MEETING AGENDA**

**Broadmeadow School  
School Committee Room**

**January 7, 2020 7:00 p.m.**

Next School Committee Meeting: January 21, 2020

**7:00 p.m. Public Comments**

**7:05 p.m. School Committee Comments**

**7:10 p.m. Superintendent's Comments**

**7:15 p.m. Consent Items**

1. Approve FY20 Budget Transfers
2. Approve FY20 Grants

### **Discussion Items**

**7:15 p.m. FY21 Budget Consultation with Town Manager**

**7:45 p.m. FY2021-2035 Enrollment Projection**

**8:15 p.m. Superintendent's FY21 Budget Discussion**

**9:00 p.m. Action Items**

Establish Needham High School Dave DiCicco Golden Heart Scholarship  
Establish Needham High School Zack Kalish Memorial Scholarship

**9:05 p.m. School Committee Comments**

### **Information Items**

Needham Community Education FY21 Revolving Fund Budget Request  
Needham Preschool FY21 Revolving Fund Budget Request  
ACCEPT Collaborative 2018-2019 Annual Report



## Needham School Committee

January 7, 2020

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Agenda Item:     **Public Comments**

Background Information:

- The School Committee Chair will offer the opportunity for the public to speak to the School Committee on issues not on the agenda.



## Needham School Committee

January 7, 2020

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Agenda Item:     **School Committee Chair and Subcommittee Update**

Background Information:

- The Chair and subcommittee members may offer brief updates on issues not on the agenda.

Members of the School Committee available for comment:

Michael Greis, Chair  
Andrea Longo Carter, Vice-Chair  
Connie Barr  
Heidi Black  
Susan Neckes  
Aaron Pressman  
Matthew Spengler





## Needham School Committee

### January 7, 2020

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Agenda Item:     **Superintendent's Comments**

Background Information:

Superintendent Daniel E. Gutekanst will apprise the School Committee of events, information, and matters of interest not on the agenda.



## Needham School Committee

January 7, 2020

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Agenda Item:     **Consent Agenda**

1. Approve FY20 Budget Transfers
2. Approve FY20 Grants

Chair: "Does anyone wish to remove any item from the consent agenda?"

If none removed:

"There being no objection, these items are adopted by unanimous consent."

## ***NEEDHAM SCHOOL COMMITTEE***

**Agenda Item #:** \_\_\_\_\_

**Date:** January 7, 2020

**Item Title:** **FY 2019/20 Budget Transfers**

**Item Description:** Transfer of FY20 budget allocations between line items in the following amounts:

Salaries	(\$0.00)
Purchase of Service/Expense	\$0.00
Capital	<u>\$0.00</u>
Net Change:	\$0.00

**Issues:** Under Massachusetts General Law Chapter 71, Section 34, and School Committee Policy #DBJ, the School Committee is empowered to make changes in allocations between line items within its budget, once approved by Town Meeting. In no case may a transfer result in the aggregate Operating Budget being more than authorized by the Town. Transfers between separate, non-operating appropriations are prohibited except as permitted by law.

**Recommendation/Options:** Approve the attached line item budget transfers.

**Rationale:** The attached line item budget transfers are requested to more accurately reflect expenses to be incurred during this fiscal year.

**Implementation Implications:**

**Supporting Data:** Attached listing of requested line-item budget transfers within the FY20 Operating Budget.

School Committee (circle one)

Action	Information	Discussion	Consent Calendar
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Central Administrator	Town Counsel	Sub-Committee:	_____
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Will report back to School Committee (date): \_\_\_\_\_

Respectfully Submitted,

*Anne Gulati*

Anne Gulati  
Assistant Superintendent for Finance & Operations

G/L ACCOUNT #	DEPARTMENT	SCHOOL	FUNCTION	OBJECT	DEBIT	CREDIT	NET
<b><u>PURCHASE OF SERVICE &amp; EXPENSE</u></b>							
0001.3030.040.99.1220.099.99.520.030.5380.300.04	Director of Personnel	Unassigned	Assistant Superintendent	Other Purchased Services		\$7,356.00	(7,356.00)
0001.3030.040.99.1420.099.99.520.030.5300.300.04	Director of Personnel	Unassigned	Human Resources and Benefits	Professional & Technical Training	\$5,356.00		5,356.00
0001.3030.040.99.1220.099.99.520.030.5730.300.06	Director of Personnel	Unassigned	Assistant Superintendent	Dues & Memberships	\$2,000.00		2,000.00
0001.3030.040.99.1220.099.99.520.030.5420.300.05	Director of Personnel	Unassigned	Assistant Superintendent	Office Supplies		\$1,000.00	(1,000.00)
0001.3030.040.99.1220.099.99.520.030.5780.300.06	Director of Personnel	Unassigned	Assistant Superintendent	All Other Expenses	\$1,000.00		1,000.00
0001.3561.005.21.2358.030.99.520.030.5780.300.06	Math Instruction	Broadmeadow	Outside PD for Instructional Staff	All Other Expenses	83.00		83.00
0001.3561.005.22.2358.030.99.520.030.5780.300.06	Math Instruction	Eliot	Outside PD for Instructional Staff	All Other Expenses	520.00		520.00
0001.3561.005.23.2358.030.99.520.030.5780.300.06	Math Instruction	Williams	Outside PD for Instructional Staff	All Other Expenses	27.00		27.00
0001.3561.005.24.2358.030.99.520.030.5780.300.06	Math Instruction	Mitchell	Outside PD for Instructional Staff	All Other Expenses	27.00		27.00
0001.3561.005.25.2358.030.99.520.030.5780.300.06	Math Instruction	Newman	Outside PD for Instructional Staff	All Other Expenses	27.00		27.00
0001.3561.005.21.2410.030.99.520.030.5517.300.05	Math Instruction	Broadmeadow	Textbooks	Ed Supplies - Textbooks		684.00	(684.00)
0001.3260.005.26.2356.099.99.520.030.5780.300.06	High Rock	High Rock	Costs for Instructional Staff to Attend PD	All Other Expenses	650.00		650.00
0001.3260.005.26.2358.099.99.520.030.5303.300.04	High Rock	High Rock	Outside PD for Instructional Staff	Professional & Technical Training		650.00	(650.00)
0001.3260.005.26.2356.099.99.520.030.5303.300.04	High Rock	High Rock	Costs for Instructional Staff to Attend PD	Professional & Technical Training	320.00		320.00
0001.3260.005.26.2358.099.99.520.030.5303.300.04	High Rock	High Rock	Outside PD for Instructional Staff	Professional & Technical Training		320.00	(320.00)
0001.3110.005.10.2358.099.99.520.030.5300.300.04	Professional Development	District	Outside PD for Instructional Staff	Professional & Technical Services		10,000.00	(10,000.00)
0001.3030.040.99.1420.099.99.520.030.5300.300.04	Director of Personnel	Unassigned	Human Resources and Benefits	Professional & Technical Services	10,000.00		10,000.00
0001.3110.005.25.2358.099.99.520.030.5300.300.04	Professional Development	Newman	Outside PD for Instructional Staff	Professional & Technical Services		750.00	(750.00)
0001.3110.005.10.2358.099.99.520.030.5300.300.04	Professional Development	District	Outside PD for Instructional Staff	Professional & Technical Services	750.00		750.00
0001.3132.040.21.2455.090.99.520.030.5305.300.04	Curriculum Development	Broadmeadow	Instructional Software and Licenses	Software and License Fees	2,557.00		2,557.00
0001.3132.040.22.2455.090.99.520.030.5305.300.04	Curriculum Development	Eliot	Instructional Software and Licenses	Software and License Fees	2,557.00		2,557.00
0001.3132.040.23.2455.090.99.520.030.5305.300.04	Curriculum Development	Williams	Instructional Software and Licenses	Software and License Fees	2,557.00		2,557.00
0001.3132.040.24.2455.090.99.520.030.5305.300.04	Curriculum Development	Mitchell	Instructional Software and Licenses	Software and License Fees	2,557.00		2,557.00
0001.3132.040.25.2455.090.99.520.030.5305.300.04	Curriculum Development	Newman	Instructional Software and Licenses	Software and License Fees	2,557.00		2,557.00
0001.3132.040.26.2455.090.99.520.030.5305.300.04	Curriculum Development	High Rock	Instructional Software and Licenses	Software and License Fees	3,580.00		3,580.00
0001.3132.040.30.2455.090.99.520.030.5305.300.04	Curriculum Development	Pollard	Instructional Software and Licenses	Software and License Fees	2,557.00		2,557.00
0001.3132.040.40.2455.090.99.520.030.5305.300.04	Curriculum Development	NHS	Instructional Software and Licenses	Software and License Fees	2,557.00		2,557.00
0001.3132.040.21.2455.090.99.520.030.5275.300.04	Curriculum Development	Broadmeadow	Instructional Software and Licenses	Software License and User Fees		1,891.00	(1,891.00)
0001.3132.040.22.2455.090.99.520.030.5275.300.04	Curriculum Development	Eliot	Instructional Software and Licenses	Software License and User Fees		1,891.00	(1,891.00)
0001.3132.040.23.2455.090.99.520.030.5275.300.04	Curriculum Development	Williams	Instructional Software and Licenses	Software License and User Fees		1,891.00	(1,891.00)
0001.3132.040.24.2455.090.99.520.030.5275.300.04	Curriculum Development	Mitchell	Instructional Software and Licenses	Software License and User Fees		1,891.00	(1,891.00)
0001.3132.040.25.2455.090.99.520.030.5275.300.04	Curriculum Development	Newman	Instructional Software and Licenses	Software License and User Fees		1,890.00	(1,890.00)
0001.3132.040.26.2455.090.99.520.030.5275.300.04	Curriculum Development	High Rock	Instructional Software and Licenses	Software License and User Fees		1,890.00	(1,890.00)
0001.3132.040.30.2455.090.99.520.030.5275.300.04	Curriculum Development	Pollard	Instructional Software and Licenses	Software License and User Fees		1,890.00	(1,890.00)
0001.3132.040.40.2455.090.99.520.030.5275.300.04	Curriculum Development	NHS	Instructional Software and Licenses	Software License and User Fees		1,890.00	(1,890.00)
0001.3132.040.50.2455.090.99.520.030.5275.300.04	Curriculum Development	Preschool	Instructional Software and Licenses	Software License and User Fees		1,890.00	(1,890.00)
0001.3132.005.40.2430.099.99.520.030.5510.300.05	Curriculum Development	NHS	General Supplies	Educational Supplies		4,465.00	(4,465.00)
<b>SUBTOTAL PURCHASE OF SERVICE &amp; EXPENSE</b>					<b>42,239.00</b>	<b>\$42,239.00</b>	-
<b>GRAND TOTAL</b>					<b>42,239.00</b>	<b>42,239.00</b>	-

## NEEDHAM SCHOOL COMMITTEE

Agenda Item #: \_\_\_\_\_

Date: January 3, 2020

Item Title: **Approve FY 2019/20 Grants**

**Item Description:** The School Department has received additional FY 19/20 grant allocations, which are highlighted below in yellow. These additional allocations must be formally accepted by the School Committee. The NEF grants were previously accepted, and are presented below for informational purposes only.

Federal, State & Local Grants:	AWARD FY19	ACCEPT'D FY19	AWARD FY20	\$ INC/(DEC) OVR FY19	REVISED FY19	\$ INC/(DEC) OVR FY19
<u>Federal Grants</u>						
Title IIA/ Improving Educator Quality/ 140	65,608	65,111	68,286	3,175		
Title I Part A/ 305	98,264	98,197	123,415	25,218		
Title III Part A/ English Language Acquisition/180	23,526	23,526	22,388	(1,138)		
Title III/ English Language Acquisition (Supplemental)/184	-	-	-	-		
Title IVA Part A/ Student Support & Academic Enrichment / 309	7,638	7,638	10,000	2,362		
LEAP Incentive Grant	-	-	-	-		
SPED Program Improvement/ 274	-	-	-	-		
SPED Early Childhood/ 262	35,390	35,254	36,342	1,088		
SPED Early Childhood Program Improvement/298	-	-	-	-		
SPED Entitlement/240 (94-142)	1,304,678	1,304,678	1,325,380	20,702		
<u>State Grants:</u>						
Academic Support/632 (MCAS Tutoring)	-	-	-	-		
Essential School Health	115,899	115,899	100,000	(15,899)		
METCO/ 317	1,088,335	1,088,335	1,102,685	14,350	1,197,675	109,340
Special Education Circuit Breaker *	1,540,049	1,540,049	1,587,130	47,081		
<u>Local Grants:</u>						
NEF Fall Grants	67,553	67,553	50,102	(17,451)		
NEF Winter Grants	28,992	28,992	TBD	TBD		
NEF Spring Grants	31,345	31,345	TBD	TBD		

Circuit Breaker Reimbursement %s: FY19 Final 74.4%, FY20 Budget 72%; FY20 Actual 75%

**Issues:** M.G.L. Chapter 44, Section 53A and School Committee policy #DFC/KH authorize the School Committee to accept any grant of gifts or funds given for educational purposes by the federal or state government, charitable foundations, private corporations, PTCs or an individual. M.G.L. Chapter 44, Section 53A further stipulates that any monies received and accepted by the School Committee may be expended without further appropriation

**Recommendation/Options:** That the School Committee approves the receipt and acceptance of the additional FY20 grant allocations highlighted above. The NEF grants have already been accepted and do not require further approval.

**School Committee:** **CONSENT**

Respectfully Submitted,

*Anne Gulati*

Assistant Superintendent for Finance & Operations



## Needham School Committee

January 7, 2020

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Agenda Item:     **Discussion**

### **FY21 Budget Consultation with Town Manager**

#### Background Information:

- Town Manager Kate Fitzpatrick will consult with the School Committee on the FY21 budget.

#### Persons Available for Presentation:

Ms. Kate Fitzpatrick, Town Manager

Mr. David Davison, Assistant Town Manager / Director of Finance



## Needham School Committee

January 7, 2020

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Agenda Item:     **Discussion**

### **FY2021-2035 Enrollment Projection**

Background Information:

- The district has contracted with McKibben Demographic Research to provide enrollment projections.

Persons Available for Presentation:

Ms. Anne Gulati, Assistant Superintendent for Finance and Operations

# NEEDHAM PUBLIC SCHOOLS ENROLLMENT PROJECTION

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FY21-FY35

JANUARY 7, 2020



## SUMMARY “BEST” RESULTS FY21-FY35

- PreK-12 enrollment is projected to remain relatively flat, declining only slightly, at a rate of about (0.01%)/year (or 0.12% overall), to approximately 5,700 pupils by September 2034.

Needham Public Schools PreK-12 Total Enrollment by Level: FY20-35						
McKibben Demographics Dec-19 Best Series	2019-20	2024-25	2034-35	Cum Change FY20-35	Cum Change FY20-25	Cum Change FY25-35
<u>Enrollment</u>						
PreK	72	72	72	-	-	-
Gr K-5	2,586	2,584	2,428	(158)	(2)	(156)
Gr 6-8	1,391	1,399	1,364	(27)	8	(35)
<u>Gr 9-12</u>	<u>1,658</u>	<u>1,838</u>	<u>1,836</u>	<u>178</u>	<u>180</u>	<u>(2)</u>
<b>PreK-Total</b>	<b>5,707</b>	<b>5,893</b>	<b>5,700</b>	<b>(7)</b>	<b>186</b>	<b>(193)</b>

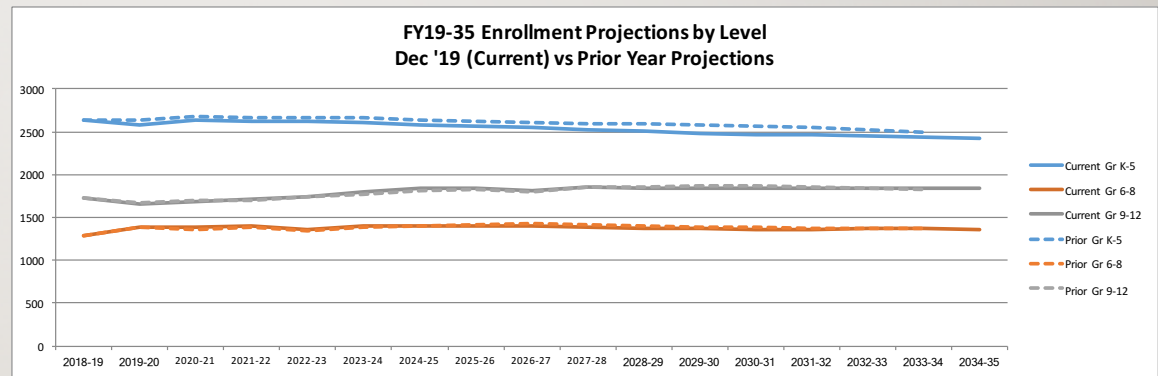
## SUMMARY “BEST” RESULTS FY21-FY35

- Although the long-term trend continues to be for 'level enrollment,' the short term will continue to be characterized by a rapid increase in the school population, followed by a rapid decrease in population.

Needham Public Schools PreK-12 Total Enrollment by Level: FY20-35						
McKibben Demographics Dec-19 Best Series	2019-20	2024-25	2034-35	Cum Change FY20-35	Cum Change FY20-25	Cum Change FY25-35
<u>Enrollment</u>						
PreK	72	72	72	-	-	-
Gr K-5	2,586	2,584	2,428	(158)	(2)	(156)
Gr 6-8	1,391	1,399	1,364	(27)	8	(35)
<u>Gr 9-12</u>	<u>1,658</u>	<u>1,838</u>	<u>1,836</u>	<u>178</u>	<u>180</u>	<u>(2)</u>
<b>PreK-Total</b>	<b>5,707</b>	<b>5,893</b>	<b>5,700</b>	<b>(7)</b>	<b>186</b>	<b>(193)</b>

## SUMMARY “BEST” RESULTS FY21-FY35

- Over the next fifteen years, elementary enrollment is projected to decline, driven by the Town’s declining birth rate, albeit more rapidly than previously predicted. Middle and high school enrollment will remain strong, as the existing classes of 400+ students cycle through the system.



# SUMMARY “BEST” RESULTS FY 2020/21

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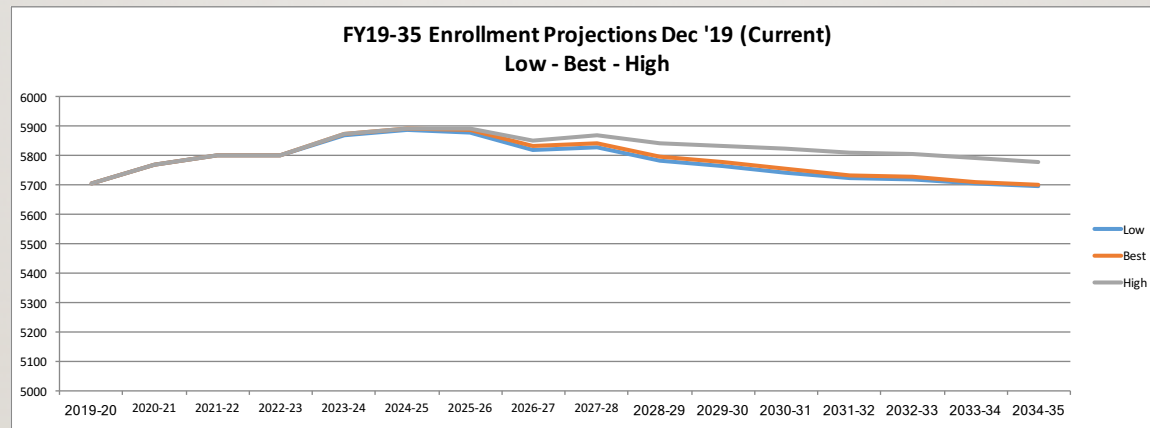
- The enrollment projection for FY21 is for an additional 64 students:

<u>Level</u>	<u>Inc/(Dec)</u>
• Elementary	48
• Middle	(6)
• High	22

Projected Enrollment Vs. Current & Prior Projection	11/2019 FY20	11/2019 FY21	Inc/(Dec) Ovr Prior
Preschool	72	72	-
Broadmeadow	548	557	9
Eliot	412	425	13
Williams	518	533	15
Mitchell	484	481	(3)
Newman	624	638	14
High Rock	499	430	(69)
Pollard	892	955	63
<u>NHS</u>	<u>1,658</u>	<u>1,680</u>	<u>22</u>
<b>Totals</b>	<b>5,707</b>	<b>5,771</b>	<b>64</b>

# SUMMARY “HIGH” RESULTS FY21-FY35

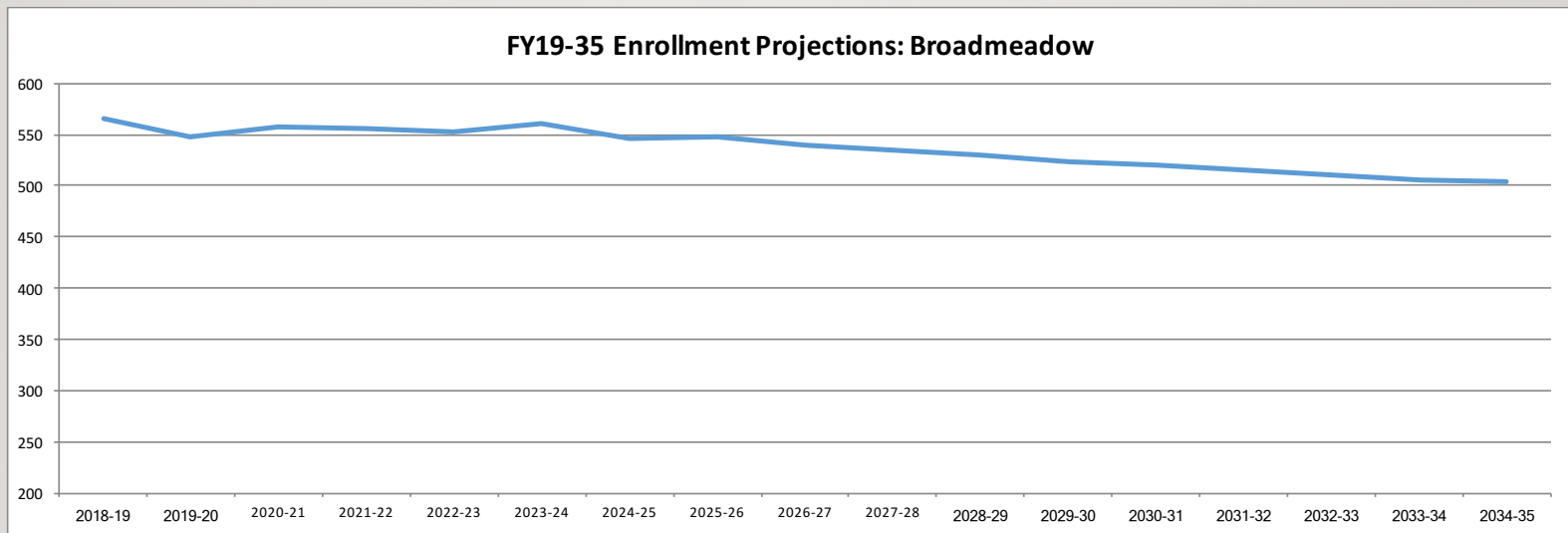
- Separate ‘high’ enrollment projections take possible future development into account.
- The high projection includes a prospective 250-unit ‘overlay’ development, which could generate 82 new students between FY26-31.





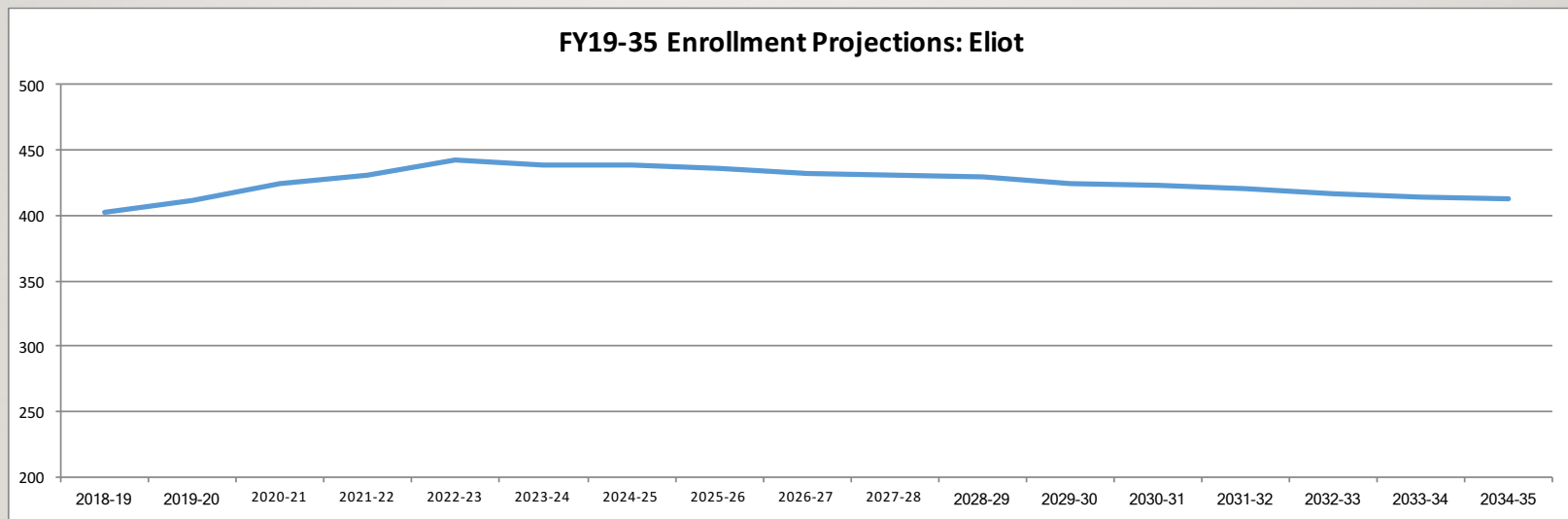
# BROADMEADOW

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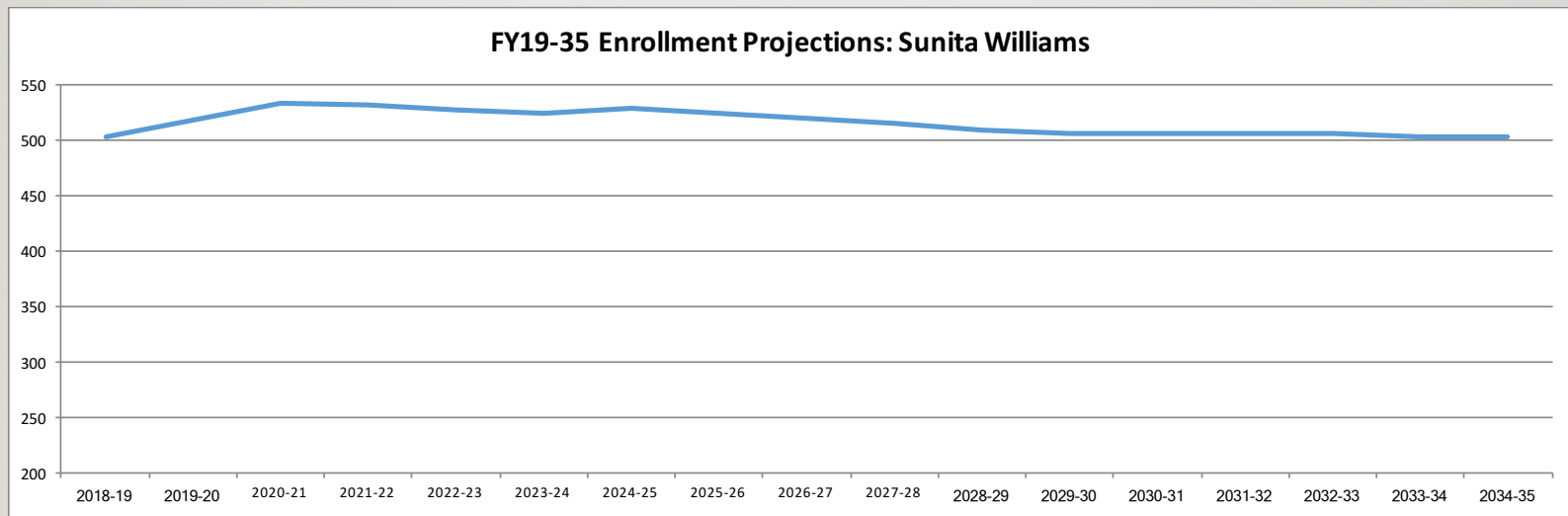
# ELIOT

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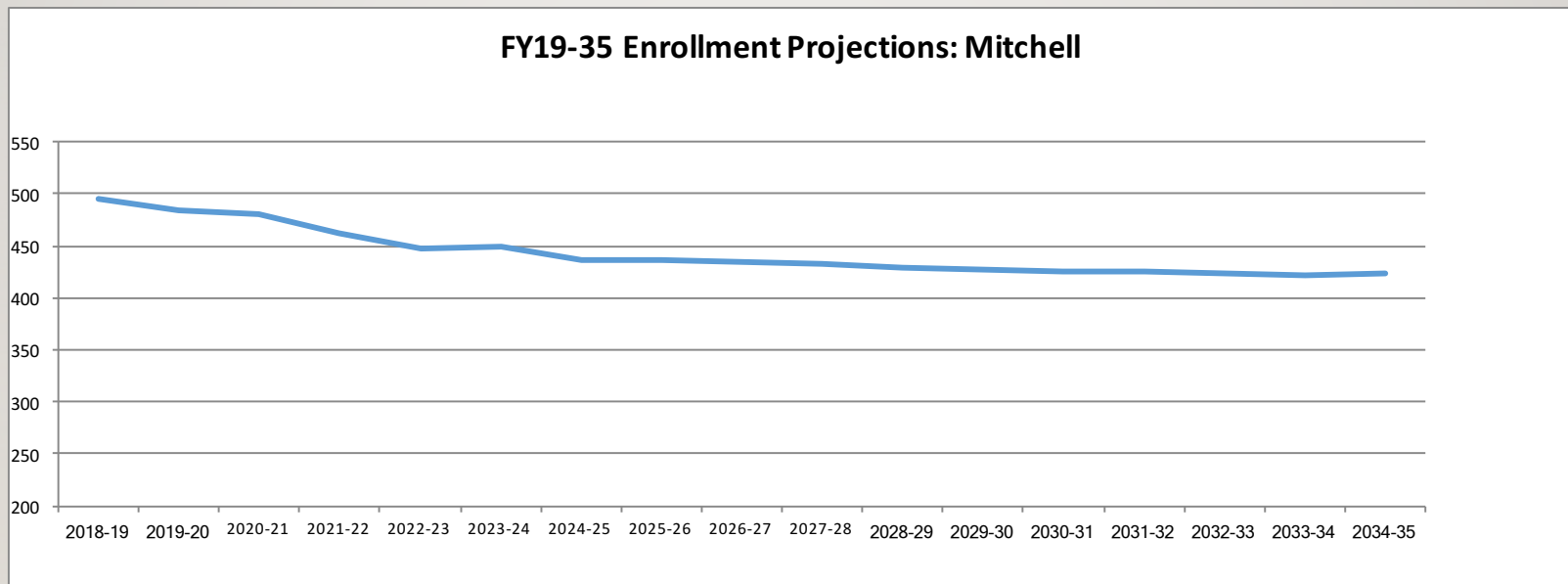
# WILLIAMS

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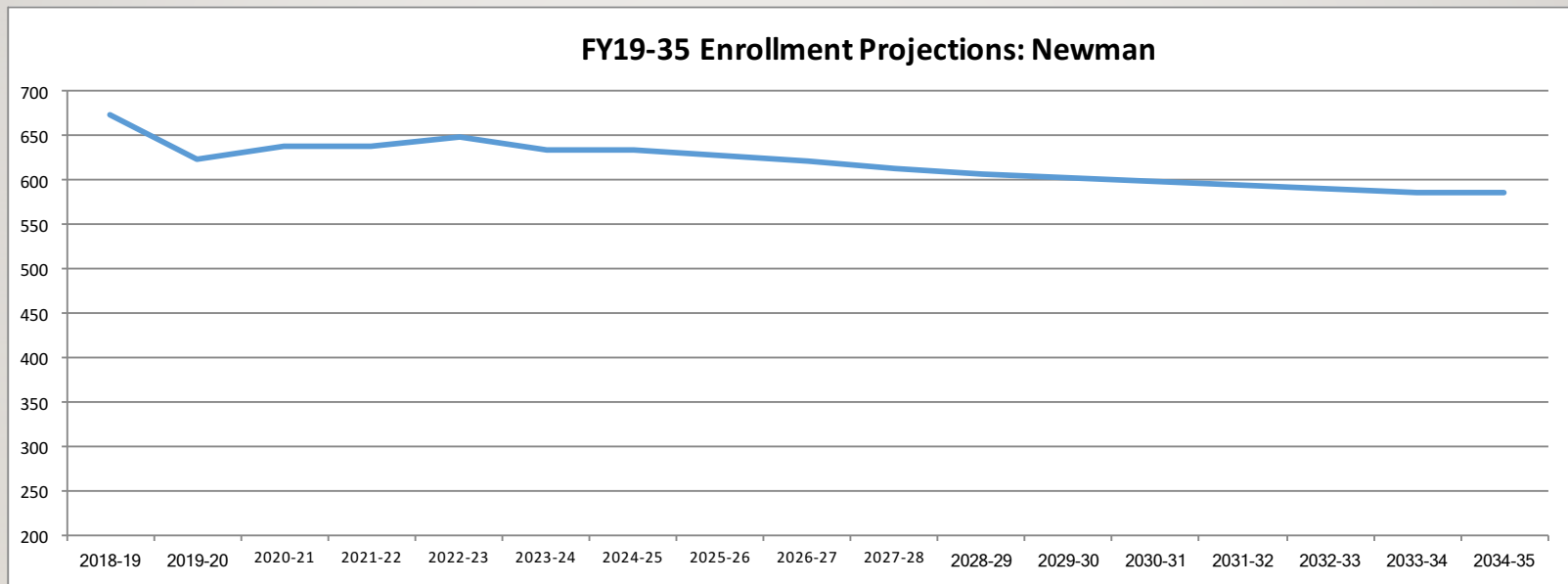




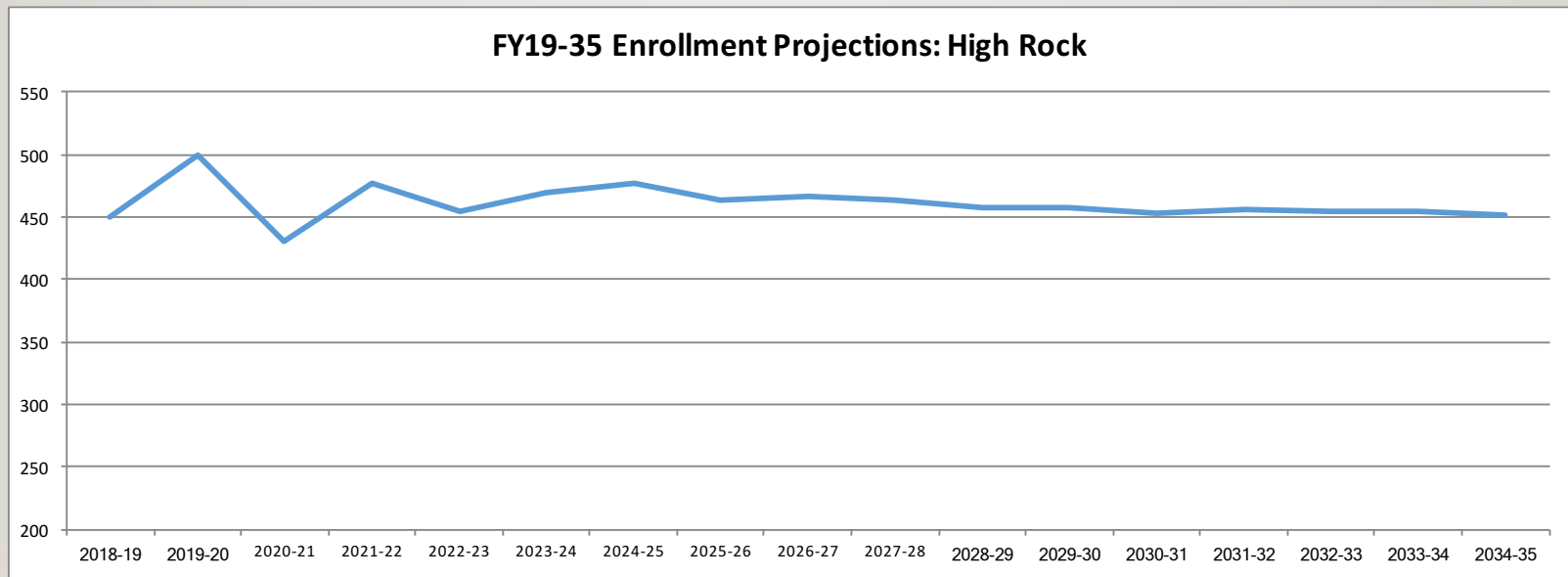
# MITCHELL



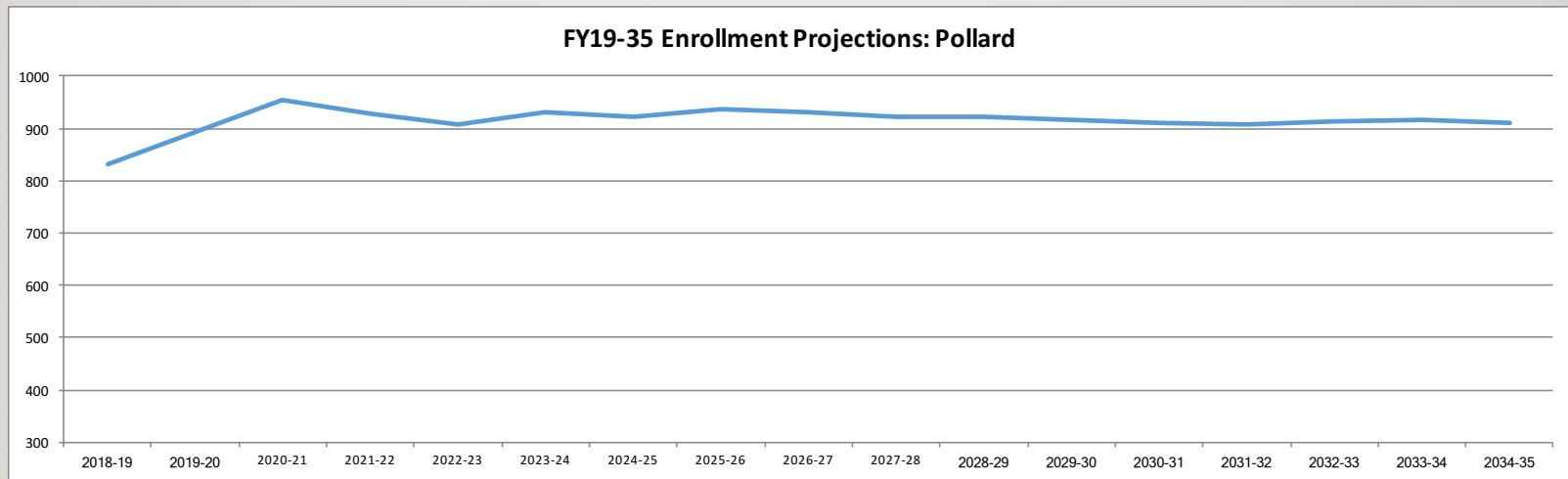
# NEWMAN



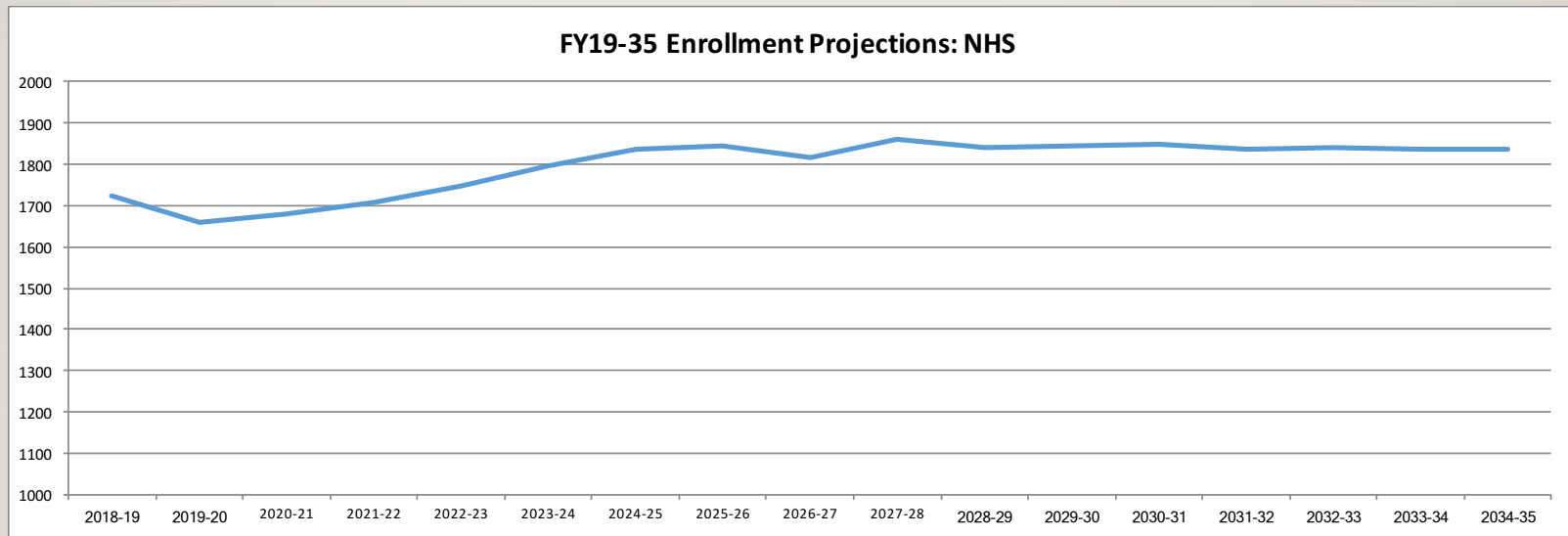
# HIGH ROCK



# POLLARD



# NEEDHAM HIGH





# NEEDHAM PUBLIC SCHOOLS

ASSISTANT SUPERINTENDENT FOR FINANCE & OPERATIONS

ANNE GULATI

1330 HIGHLAND AVENUE \* NEEDHAM, MA 02492  
781-455-0400 EXT. 11206 \* 781-455-0417 (FAX)

December 10, 2019

To: Needham School Committee  
From: Anne Gulati Director of Financial Operations  
RE: FY 21-35 *Final* Enrollment Projection

Recently, McKibben Demographic Associates issued final enrollment projections for the fifteen-year period of FY 2020/21 – 2034/35. These projections update the preliminary estimates developed in November, 2019 and were developed according to the Memorandum of Understanding between Boards, which called for prior consultation with the Board of Selectmen and Finance Committee prior to the development of the projections. These results reflect the official October 1, 2019 enrollment counts.

## Summary of Results:

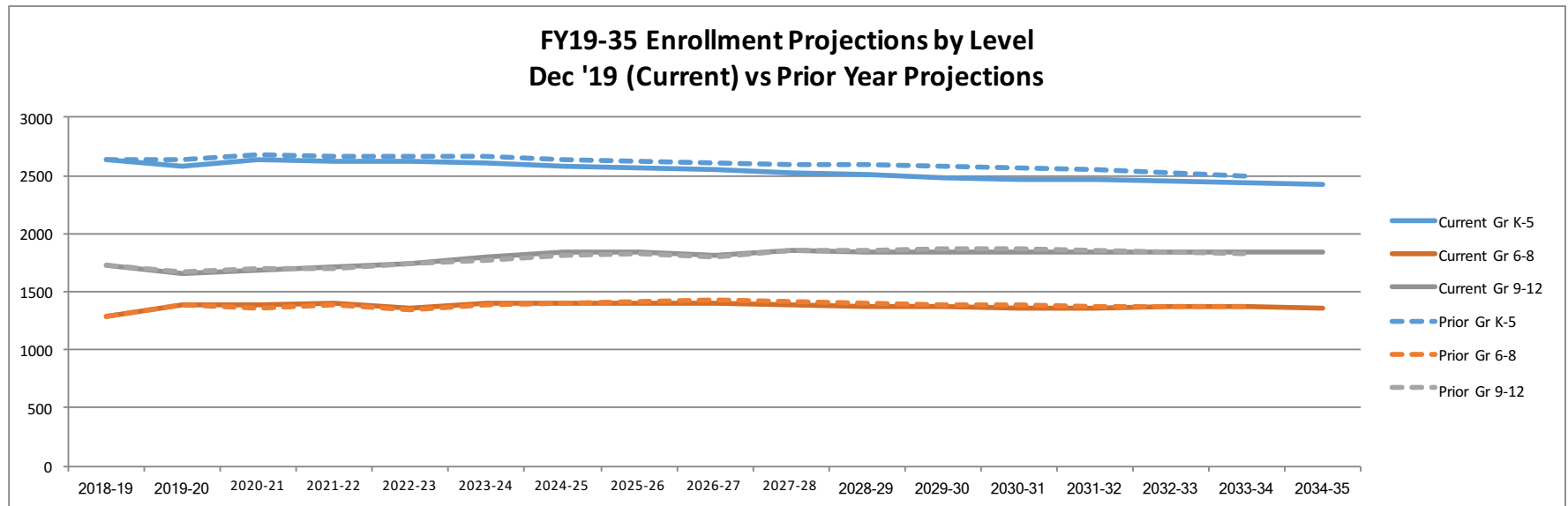
The updated results, which are depicted in the charts on the following pages, reflect the following broad observations:

- Over the next fifteen years, K-12 enrollment is projected to remain relatively flat, but decline slightly, at a rate of about (0.01%)/year (or 0.12% overall), to approximately 5,628 pupils by September 2034. This projection differs from last year, which was for slight growth overall, at a rate of about 0.06%/year (or 0.9% overall.)
- Although the long-term trend continues to be for 'level enrollment,' the short term will continue to be characterized by a rapid increase in the school population, followed by a rapid decrease in population. According to the projections, K-12 enrollment will grow from the current level of 5,635 to a peak of 5,821 students in the 2024/25 School Year, and then decline to 5,628 by 2034/35. The period where enrollment is increasing will add 186 anticipated new students to the system. During the declining enrollment period, Needham will lose an estimated 193 students.
- The K-12 enrollment projection for FY21 is for an additional 64 students, or 5,699 students overall. This projection reflects 48 more elementary students, six fewer middle students and 22 more students at Needham High School. The changes at the secondary level reflect

the current year classes moving through the system. Also noteworthy, the 2020/21 school year begins the march of high school students toward a peak Grade 9-12 enrollment of 1,860 in 2027/28.

Needham Public Schools K-12 Total Enrollment by Level: FY20-35																											
McKibben Demographics																									Cum	Cum	Cum
Dec-19 Best Series	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35	FY20-35	FY20-25	FY25-35		
<u>Enrollment</u>																											
Gr K-5	2,559	2,522	2,542	2,552	2,593	2,641	2,586	2,634	2,618	2,618	2,605	2,584	2,572	2,547	2,525	2,504	2,485	2,472	2,461	2,448	2,432	2,428	(158)	(2)	(156)		
Gr 6-8	1,298	1,312	1,290	1,297	1,304	1,282	1,391	1,385	1,405	1,361	1,401	1,399	1,401	1,398	1,385	1,380	1,374	1,363	1,365	1,369	1,371	1,364	(27)	8	(35)		
Gr 9-12	1,582	1,631	1,672	1,659	1,685	1,722	1,658	1,680	1,707	1,749	1,796	1,838	1,843	1,815	1,860	1,842	1,846	1,847	1,837	1,840	1,835	1,836	178	180	(2)		
Total	5,439	5,465	5,504	5,508	5,582	5,645	5,635	5,699	5,730	5,728	5,802	5,821	5,816	5,760	5,770	5,726	5,705	5,682	5,663	5,657	5,638	5,628	(7)	186	(193)		
<u>Annual Inc/(Dec)</u>																											
Gr K-5	40	(37)	20	10	41	48	(55)	48	(16)	-	(13)	(21)	(12)	(25)	(22)	(21)	(19)	(13)	(11)	(13)	(16)	(4)					
Gr 6-8	(15)	14	(22)	7	7	(22)	109	(6)	20	(44)	40	(2)	2	(3)	(13)	(5)	(6)	(11)	2	4	2	(7)					
Gr 9-12	20	49	41	(13)	26	37	(64)	22	27	42	47	42	5	(28)	45	(18)	4	1	(10)	3	(5)	1					
Total	45	26	39	4	74	63	(10)	64	31	(2)	74	19	(5)	(56)	10	(44)	(21)	(23)	(19)	(6)	(19)	(10)					

- The enrollment patterns by level will follow a familiar theme. Over the next fifteen years, elementary enrollment is projected to decline, driven by the Town's declining birth rate, albeit more rapidly than previously predicted. Middle and high school enrollment will remain strong, as the existing classes of 400+ students cycle through the system.



- As the charts and graphs illustrate, the anticipated decline in elementary enrollment will happen more rapidly than previously anticipated, given updated assumptions around existing home sales. For the current (2019) series projections, existing home sales are held constant at a minimum of 230 per year, versus 250 in the 2018 series. According to McKibben, the past twelve months saw a decline in home sales, particularly in the Broadmeadow, Mitchell and Newman neighborhoods, as well as slightly smaller household sizes, overall. McKibben indicates that this could signal a trend toward empty nester homeowners 'staying put' longer in their homes, and deciding not to sell. Since Needham relies heavily on in-migration to maintain population, reducing the assumed rate of existing home sales is projected to lead to slower or declining enrollment growth over time.

Needham Public Schools PreK-12 Total Enrollment by Level: Current (Dec '2019) v. Prior Year (2018) Projection																									
McKibben Demographics	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35	Cum Change FY20-34	Cum Change FY20-25	Cum Change FY25-34
Current (2019)																									
PreK	84	82	82	80	82	83	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72		-	-	-
Gr K-5	2,559	2,522	2,542	2,552	2,593	2,641	2,586	2,634	2,618	2,618	2,605	2,584	2,572	2,547	2,525	2,504	2,485	2,472	2,461	2,448	2,432		(154)	(2)	(152)
Gr 6-8	1,298	1,312	1,290	1,297	1,304	1,282	1,391	1,385	1,405	1,361	1,401	1,399	1,401	1,398	1,385	1,380	1,374	1,363	1,365	1,369	1,371		(20)	8	(28)
Gr 9-12	1,582	1,631	1,672	1,659	1,685	1,722	1,658	1,680	1,707	1,749	1,796	1,838	1,843	1,815	1,860	1,842	1,846	1,847	1,837	1,840	1,835		177	180	(3)
PreK-Total	5,523	5,547	5,586	5,588	5,664	5,728	5,707	5,771	5,802	5,800	5,874	5,893	5,888	5,832	5,842	5,798	5,777	5,754	5,735	5,729	5,710		3	186	(183)
Prior (2018)																									
PreK	84	82	82	80	82	83	83	83	83	83	83	83	83	83	83	83	83	83	83	83	83		-	-	-
Gr K-5	2,559	2,522	2,542	2,552	2,593	2,641	2,633	2,675	2,661	2,667	2,663	2,640	2,619	2,606	2,597	2,596	2,587	2,569	2,547	2,518	2,492		(141)	7	(148)
Gr 6-8	1,298	1,312	1,290	1,297	1,304	1,282	1,381	1,362	1,389	1,346	1,391	1,400	1,420	1,428	1,409	1,397	1,385	1,385	1,379	1,379	1,374		(7)	19	(26)
Gr 9-12	1,582	1,631	1,672	1,659	1,685	1,722	1,670	1,693	1,702	1,746	1,769	1,808	1,824	1,797	1,856	1,859	1,874	1,874	1,857	1,840	1,828		158	138	20
PreK-Total	5,523	5,547	5,586	5,588	5,664	5,728	5,767	5,813	5,835	5,842	5,906	5,931	5,946	5,914	5,945	5,935	5,929	5,911	5,866	5,820	5,777		10	164	(154)
Variance																									
PreK	-	-	-	-	-	-	(11)	(11)	(11)	(11)	(11)	(11)	(11)	(11)	(11)	(11)	(11)	(11)	(11)	(11)	(11)				
Gr 1-5	-	-	-	-	-	-	(47)	(41)	(43)	(49)	(58)	(56)	(47)	(59)	(72)	(92)	(102)	(97)	(86)	(70)	(60)				
Gr 6-8	-	-	-	-	-	-	10	23	16	15	10	(1)	(19)	(30)	(24)	(17)	(11)	(22)	(14)	(10)	(3)				
Gr 9-12	-	-	-	-	-	-	(12)	(13)	5	3	27	30	19	18	4	(17)	(28)	(27)	(20)	-	7				
PreK-Total	-	-	-	-	-	-	(60)	(42)	(33)	(42)	(32)	(38)	(58)	(82)	(103)	(137)	(152)	(157)	(131)	(91)	(67)				

- The 'best' enrollment projection also reflects the impact of the two newly-built residential housing complexes in Needham: the Modera (at 700 Greendale Avenue in the Broadmeadow District) and the Kendrick (at 275 2nd Avenue in the Eliot District.) According to the leasing offices at both locations, the Modera fully opened for occupancy in January 2019 and is now 87% occupied, while the Kendrick fully opened for occupancy in July 2018 and is now 50% occupied. In addition, the 'best' projection includes a new 16-unit housing complex under Town review, at 1180 Great Plan Avenue, in the Newman district. This development would convert a retirement home to eight one-bedroom units and eight two-bedroom units. (This unit is projected to come on line and generate students in 2023.) These new developments are incorporated into the 'best' enrollment projections. Given the fact that both the Kendrick and Modera fully opened for



occupancy later than McKibben had originally anticipated (in July 2017), the full enrollment impact of these two developments is now extended to 2024/25.

Variance Between Preliminary (Nov '19) and Final (Dec '19) Enrollment Projections:

Needham Public Schools PreK-12 Total Enrollment by Level: Final (Dec '19) 2019 v Preliminary 2019 (Nov '19) Projections																									
McKibben Demographics	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35	Cum Change FY20-35	Cum Change FY20-25	Cum Change FY25-35
<u>Final (2019)</u>																									
PreK	84	82	82	80	82	83	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	-	-	-
Gr K-5	2,559	2,522	2,542	2,552	2,593	2,641	2,586	2,634	2,618	2,618	2,605	2,584	2,572	2,547	2,525	2,504	2,485	2,472	2,461	2,448	2,432	2,428	(158)	(2)	(156)
Gr 6-8	1,298	1,312	1,290	1,297	1,304	1,282	1,391	1,385	1,405	1,361	1,401	1,399	1,401	1,398	1,385	1,380	1,374	1,363	1,365	1,369	1,371	1,364	(27)	8	(35)
Gr 9-12	1,582	1,631	1,672	1,659	1,685	1,722	1,658	1,680	1,707	1,749	1,796	1,838	1,843	1,815	1,860	1,842	1,846	1,847	1,837	1,840	1,835	1,836	178	180	(2)
PreK-Total	5,523	5,547	5,586	5,588	5,664	5,728	5,707	5,771	5,802	5,800	5,874	5,893	5,888	5,832	5,842	5,798	5,777	5,754	5,735	5,729	5,710	5,700	(7)	186	(193)
<u>Preliminary (2019)</u>																									
PreK	84	82	82	80	82	83	75	75	75	75	75	75	75	75	75	75	75	75	75	75	75	75	-	-	-
Gr K-5	2,559	2,522	2,542	2,552	2,593	2,641	2,587	2,634	2,618	2,618	2,605	2,584	2,572	2,547	2,525	2,504	2,485	2,472	2,461	2,448	2,432	2428	(159)	(3)	(156)
Gr 6-8	1,298	1,312	1,290	1,297	1,304	1,282	1,392	1,385	1,405	1,361	1,401	1,399	1,401	1,398	1,385	1,380	1,374	1,363	1,365	1,369	1,371	1364	(28)	7	(35)
Gr 9-12	1,582	1,631	1,672	1,659	1,685	1,722	1,663	1,684	1,711	1,753	1,800	1,841	1,846	1,818	1,863	1,845	1,849	1,850	1,840	1,843	1,838	1839	176	178	(2)
PreK-Total	5,523	5,547	5,586	5,588	5,664	5,728	5,717	5,778	5,809	5,807	5,881	5,899	5,894	5,838	5,848	5,804	5,783	5,760	5,741	5,735	5,716	5,706	(11)	182	(193)
<u>Variance</u>																									
PreK	-	-	-	-	-	-	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)			
Gr 1-5	-	-	-	-	-	-	(1)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-			
Gr 6-8	-	-	-	-	-	-	(1)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-			
Gr 9-12	-	-	-	-	-	-	(5)	(4)	(4)	(4)	(4)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)			
PreK-Total	-	-	-	-	-	-	(10)	(7)	(7)	(7)	(7)	(6)	(6)	(6)	(6)	(6)	(6)	(6)	(6)	(6)	(6)	(6)			

The final projections have been updated to reflect the official October 1, 2019 enrollment projections. The two series are virtually identical, with minor adjustments only to the count of preschool and post-graduate special education students receiving services through Needham High School.

Best - Low - High Projections:

Needham Public Schools PreK-12 Total Enrollment, Dec '19: LOW - BEST - HIGH Projection																						
McKibben Demographics Dec-19 Projections	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
LOW SERIES	5,523	5,547	5,586	5,588	5,664	5,728	5,707	5,771	5,802	5,800	5,872	5,888	5,880	5,821	5,830	5,785	5,764	5,743	5,725	5,721	5,705	5,698
BEST SERIES	5,523	5,547	5,586	5,588	5,664	5,728	5,707	5,771	5,802	5,800	5,874	5,893	5,888	5,832	5,842	5,798	5,777	5,754	5,735	5,729	5,710	5,700
Inc/(Dec) Over Low	-	-	-	-	-	-	-	-	-	-	2	5	8	11	12	13	13	11	10	8	5	2
HIGH SERIES	5,523	5,547	5,586	5,588	5,664	5,728	5,707	5,771	5,802	5,800	5,874	5,893	5,891	5,851	5,872	5,841	5,834	5,823	5,809	5,807	5,790	5,777
Inc/(Dec) Over Best	-	-	-	-	-	-	-	-	-	-	-	-	3	19	30	43	57	69	74	78	80	77
Inc/(Dec) Over Low	-	-	-	-	-	-	-	-	-	-	2	5	11	30	42	56	70	80	84	86	85	79

- Consistent with the parameters developed with the Future School Needs Committee, the aforementioned enrollment projection represents a 'best' estimate, which includes only new development that is either under construction or at the review/permitting stage. These new developments include the existing Modera and Kendrick complexes, as well as the 1180 Great Plain project that is currently under review. The low projection, by contrast, includes only existing residential units (including the Kendrick and Modera), and excludes projects not yet built (such as 1180 Great Plain.) The high projection, by contrast, includes all existing and prospective development, including development that is at the conceptual planning stage, such as the 250-unit planned Residential Overlay project in the Eliot neighborhood.
- The above table compares the best, low and high projection series.

Individual School District Projections:

- The district and individual school detail results are presented on the following pages. The school-age population in the Broadmeadow district reflects the (delayed) impact of additional students coming from the Modera development, as well as a slowdown in existing home sales, compared to last year. The Eliot School enrollment reflects the (also delayed) impact of the Kendrick development. The Williams and Mitchell Schools continue previous trends, with a slowdown in existing home sales projected at Mitchell. The Newman projection includes the potential new 1180 Great Plain development, offset by fewer existing home sales. The secondary school projections reflect the impact of existing students moving through the system.

Study Assumptions:

The preliminary projections are based the following general assumptions:

1. The provisional and final 'best' population estimates are based on existing and new development, which is either under construction or at the review/ permitting stage (permitted or about to be permitted.) The 'high' forecast includes additional prospective development in the conceptual planning stages. The 'low' forecast includes only existing housing units.
2. Method of analysis remains cohort-component method of population forecasting.
3. Assumed student generation rates from new development: 1-bdrm: 0 students/ unit; 2-bdrm: 0.1 students/unit; 3-bdrm: 0.15 students/unit.
4. Economic parameters assumed over the life of the forecast: 30-year fixed mortgage interest rate stays below 5%, the metro area unemployment rate stays below 4.5%, existing home sales held constant at a minimum of 230 per year.
5. New development:
  - a. Modera: Opened Jan 2019, Brodmeadow District. 136 Units: 19 1-bedroom, 103 2-bedroom, 14 3-bedroom. Total of 62 students projected over the six-year period FY20-25. Existing construction.
  - b. Kendrick: Opened July 2019, Eliot District. 390 Units: 202 1-bedroom, 149 2-bedroom, 39 3-bedroom. Total of 124.5 students projected over the six-year period FY20-25. Existing construction.
  - c. 1180 Great Plan: 16 Units: 8 1-bedroom, 8 2-bedroom. Total of 8 students projected FY24-FY27. Under Town review.
  - d. Residential Overlay: 250 Units: 125 1-bedroom, 100 2-bedroom, 25 3-bedroom. Total of 82.5 students projected over the six-year period FY26-31. Conceptual development.

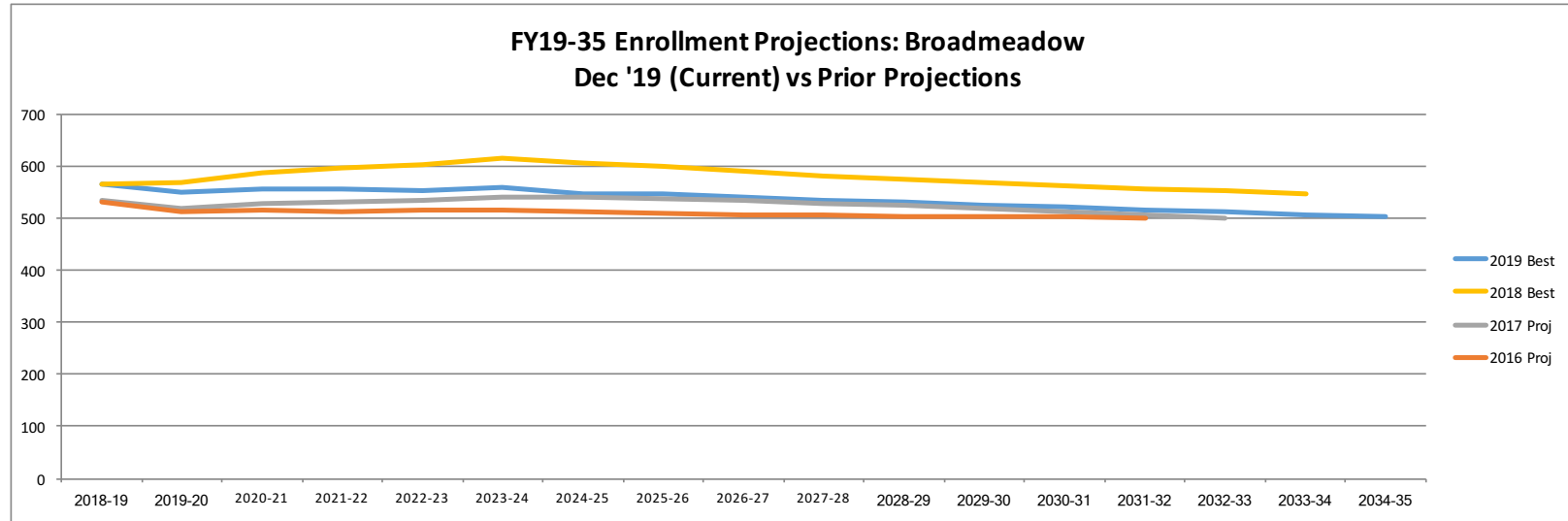
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Attachment(s)

Needham Public Schools Total Summary

DISTRICT McKibben "Best" FINAL Dec '19	Needham Public Schools Total Enrollment																					
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
PK	84	82	82	80	82	83	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72
K	406	365	404	369	404	412	390	410	408	404	402	398	395	390	387	382	383	378	376	373	371	380
1	441	449	387	433	411	430	436	420	423	421	417	414	409	406	401	398	392	390	385	383	380	378
2	419	444	471	397	448	434	441	448	433	435	433	429	426	420	418	413	411	406	406	401	399	396
3	413	416	450	473	396	460	434	448	455	439	443	442	438	436	431	429	424	423	420	420	414	412
4	444	409	415	455	481	413	463	440	454	460	445	449	448	442	441	435	435	432	432	429	429	423
5	436	439	415	425	453	492	422	468	445	459	465	452	456	453	447	447	440	443	442	442	439	439
Total: K-5	2,559	2,522	2,542	2,552	2,593	2,641	2,586	2,634	2,618	2,618	2,605	2,584	2,572	2,547	2,525	2,504	2,485	2,472	2,461	2,448	2,432	2,428
6	427	451	451	421	450	450	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
7	467	404	439	445	408	440	460	504	434	482	459	468	475	461	465	462	456	456	455	461	457	457
8	404	457	400	431	446	392	432	451	494	425	472	454	463	470	456	460	460	454	454	453	459	455
Total: 7-8	871	861	839	876	854	832	892	955	928	907	931	922	938	931	921	922	916	910	909	914	916	912
9	414	400	449	416	435	450	380	436	456	499	429	479	461	470	477	461	465	465	461	461	460	466
10	417	418	396	446	414	428	453	376	432	451	494	425	474	456	465	472	456	463	463	459	459	458
11	382	416	407	396	441	404	421	448	372	428	446	489	421	469	451	460	467	454	461	461	457	457
12	363	389	412	401	395	436	401	417	444	368	424	442	484	417	464	446	455	462	449	456	456	452
SP	6	8	8	0	0	4	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Total: 9-12	1,582	1,631	1,672	1,659	1,685	1,722	1,658	1,680	1,707	1,749	1,796	1,838	1,843	1,815	1,860	1,842	1,846	1,847	1,837	1,840	1,835	1,836
Total: K-12	5,439	5,465	5,504	5,508	5,582	5,645	5,635	5,699	5,730	5,728	5,802	5,821	5,816	5,760	5,770	5,726	5,705	5,682	5,663	5,657	5,638	5,628
Total PreK-12	5,523	5,547	5,586	5,588	5,664	5,728	5,707	5,771	5,802	5,800	5,874	5,893	5,888	5,832	5,842	5,798	5,777	5,754	5,735	5,729	5,710	5,700
Change	47	24	39	2	76	64	-21	64	31	-2	74	19	-5	-56	10	-44	-21	-23	-19	-6	-19	-10
% Change	0.9%	0.4%	0.7%	0.0%	1.4%	1.1%	-0.4%	1.1%	0.5%	0.0%	1.3%	0.3%	-0.1%	-1.0%	0.2%	-0.8%	-0.4%	-0.4%	-0.3%	-0.1%	-0.3%	-0.2%

A SCHOOL AND COMMUNITY PARTNERSHIP THAT  
CREATES EXCITED LEARNERS ~ INSPIRES EXCELLENCE ~ FOSTERS INTEGRITY

## Broadmeadow Elementary



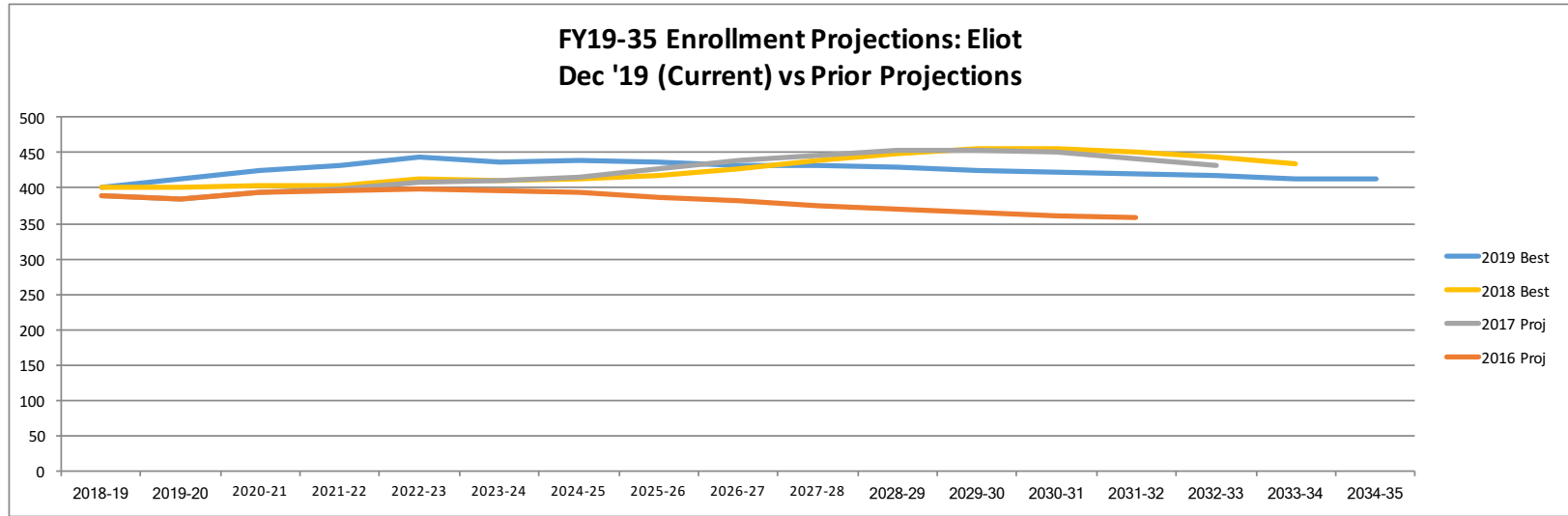
### BROADMEADOW McKibben "Best" FINAL Dec '19

	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
<b>K</b>	84	76	81	71	71	97	77	86	86	85	84	84	83	82	81	80	79	79	78	78	77	78
<b>1</b>	108	104	83	89	85	83	102	86	89	89	88	87	87	86	85	84	82	81	81	80	80	79
<b>2</b>	92	106	107	84	90	95	84	105	89	92	92	91	90	90	89	88	87	84	84	84	83	83
<b>3</b>	94	93	104	110	85	96	95	86	107	91	95	95	94	94	94	93	92	90	88	88	87	86
<b>4</b>	120	89	91	107	106	86	97	96	87	108	92	96	96	93	93	93	92	93	91	89	89	88
<b>5</b>	87	113	92	92	106	109	93	98	97	88	109	93	97	95	92	92	92	93	94	92	90	90
<b>Total K-5</b>	585	581	558	553	543	566	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
<b>Change</b>	-3	-4	-23	-5	-10	23	-18	9	-2	-2	7	-14	1	-7	-6	-4	-6	-4	-4	-5	-5	-2
<b>% Change</b>	-0.5%	-0.7%	-4.0%	-0.9%	-1.8%	4.2%	-3.2%	1.6%	-0.4%	-0.4%	1.3%	-2.5%	0.2%	-1.3%	-1.1%	-0.7%	-1.1%	-0.8%	-0.8%	-1.0%	-1.0%	-0.4%

McKibben FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
<b>Low</b>	585	581	558	553	543	566	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
<b>Best</b>	585	581	558	553	543	566	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
<b>Inc/(Dec) Over Low</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>High</b>	585	581	558	553	543	566	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
<b>Inc/(Dec) Over Best</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

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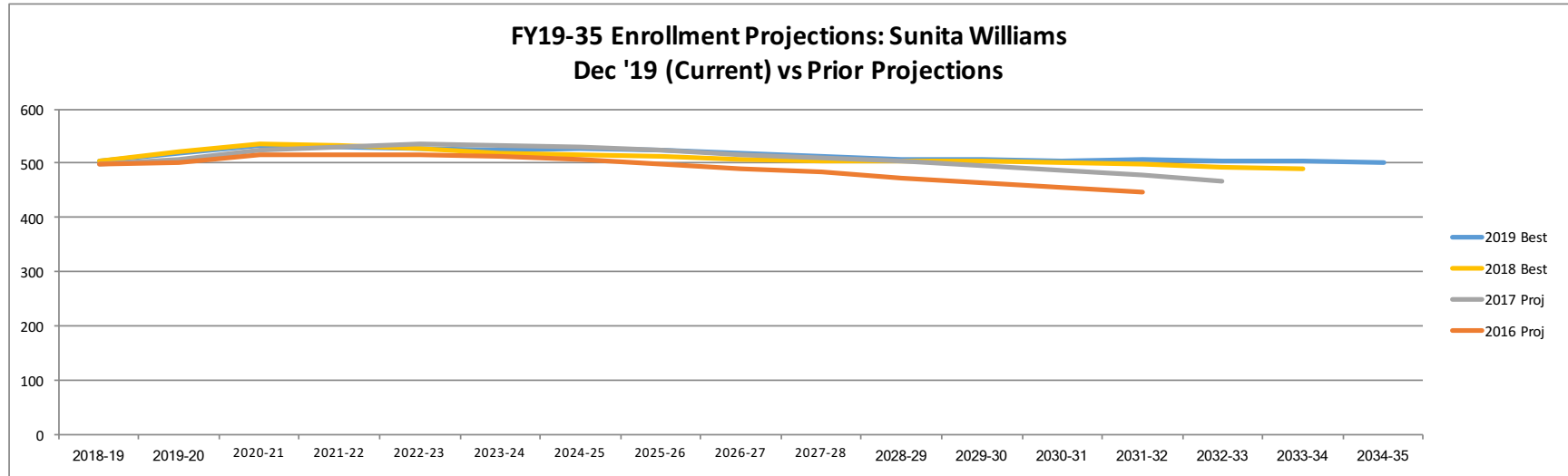
## Eliot Elementary



<b>ELIOT</b> <b>McKibben "Best"</b> <b>FINAL Dec '19</b>																						
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
<b>K</b>	58	57	61	57	64	60	64	70	70	69	69	69	69	68	67	66	65	64	64	63	63	65
<b>1</b>	65	67	61	64	58	70	67	71	72	72	71	71	70	70	69	68	67	66	65	65	64	64
<b>2</b>	67	71	73	57	65	59	75	70	74	74	73	72	72	71	72	71	70	70	69	68	68	67
<b>3</b>	61	63	72	73	57	68	61	77	72	75	75	74	73	73	73	74	73	72	72	71	70	70
<b>4</b>	62	67	63	74	75	69	73	63	79	73	76	76	75	74	75	74	75	74	74	74	73	72
<b>5</b>	74	65	65	67	74	76	72	74	64	80	74	77	77	76	75	77	75	77	76	76	76	75
<b>Total: K-5</b>	387	390	395	392	393	402	412	425	431	443	438	439	436	432	431	430	425	423	420	417	414	413
<b>Change</b>	0	3	5	-3	1	9	10	13	6	12	-5	1	-3	-4	-1	-1	-5	-2	-3	-3	-3	-1
<b>% Change</b>	0.0%	0.8%	1.3%	-0.8%	0.3%	2.3%	2.5%	3.2%	1.4%	2.8%	-1.1%	0.2%	-0.7%	-0.9%	-0.2%	-0.2%	-1.2%	-0.5%	-0.7%	-0.7%	-0.7%	-0.2%
<b>McKibben</b>																						
<b>FINAL Dec '19</b>	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
<b>Low</b>	387	390	395	392	393	402	412	425	431	443	438	439	436	432	431	430	425	423	420	417	414	413
<b>Best</b>	387	390	395	392	393	402	412	425	431	443	438	439	436	432	431	430	425	423	420	417	414	413
<b>Inc/(Dec) Over Low</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>High</b>	387	390	395	392	393	402	412	425	431	443	438	439	439	451	460	469	475	478	471	461	451	442
<b>Inc/(Dec) Over Best</b>	-	-	-	-	-	-	-	-	-	-	-	-	3	19	29	39	50	55	51	44	37	29
													3	16	10	10	11	5	(4)	(7)	(7)	(8)

A SCHOOL AND COMMUNITY PARTNERSHIP THAT  
 CREATES EXCITED LEARNERS ~ INSPIRES EXCELLENCE ~ FOSTERS INTEGRITY

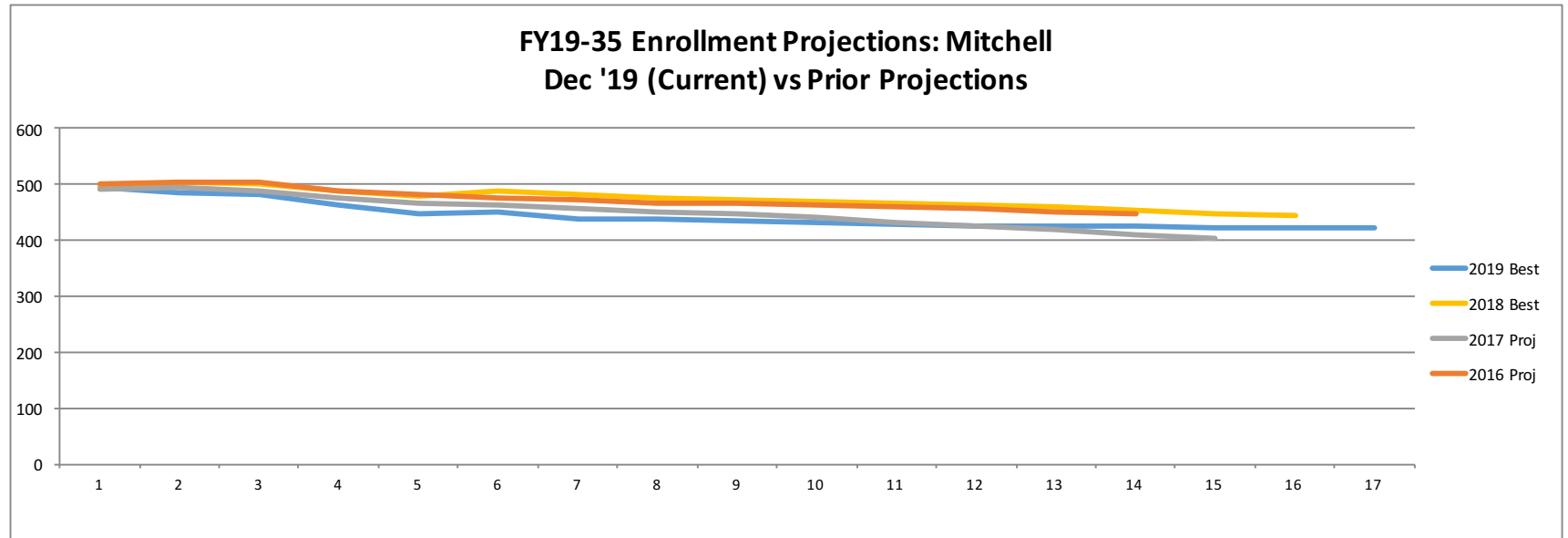
## Williams Elementary



<b>WILLIAMS</b>																						
<b>McKibben "Best"</b>																						
<b>FINAL Dec '19</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>2024-25</b>	<b>2025-26</b>	<b>2026-27</b>	<b>2027-28</b>	<b>2028-29</b>	<b>2029-30</b>	<b>2030-31</b>	<b>2031-32</b>	<b>2032-33</b>	<b>2033-34</b>	<b>2034-35</b>
<b>K</b>	71	57	82	76	83	76	83	83	82	82	82	81	80	79	79	78	78	77	77	76	76	77
<b>1</b>	73	79	62	82	82	86	80	87	86	85	85	84	83	82	81	81	80	80	79	79	78	78
<b>2</b>	72	75	88	71	85	90	92	83	90	89	88	88	87	85	84	83	84	83	83	82	82	81
<b>3</b>	73	72	80	87	72	88	93	93	84	91	90	90	90	89	87	86	85	86	86	86	85	85
<b>4</b>	59	76	76	79	86	76	92	94	94	85	92	91	91	91	90	88	89	88	89	89	89	88
<b>5</b>	81	62	77	77	79	87	78	93	95	95	86	94	93	93	93	92	90	91	92	93	93	93
<b>Total: K-5</b>	429	421	465	472	487	503	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
<b>Change</b>	10	-8	44	7	15	16	15	15	-2	-4	-4	5	-4	-5	-5	-6	-2	-1	1	-1	-2	-1
<b>% Change</b>	2.4%	-1.9%	10.5%	1.5%	3.2%	3.3%	3.0%	2.9%	-0.4%	-0.8%	-0.8%	1.0%	-0.8%	-1.0%	-1.0%	-1.2%	-0.4%	-0.2%	0.2%	-0.2%	-0.4%	-0.2%
<b>McKibben</b>																						
<b>FINAL Dec '19</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>2024-25</b>	<b>2025-26</b>	<b>2026-27</b>	<b>2027-28</b>	<b>2028-29</b>	<b>2029-30</b>	<b>2030-31</b>	<b>2031-32</b>	<b>2032-33</b>	<b>2033-34</b>	<b>2034-35</b>
<b>Low</b>	429	421	465	472	487	503	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
<b>Best</b>	429	421	465	472	487	503	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
<b>Inc/(Dec) Over Low</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>High</b>	429	421	465	472	487	503	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
<b>Inc/(Dec) Over Best</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

A SCHOOL AND COMMUNITY PARTNERSHIP THAT  
CREATES EXCITED LEARNERS ~ INSPIRES EXCELLENCE ~ FOSTERS INTEGRITY

## Mitchell Elementary

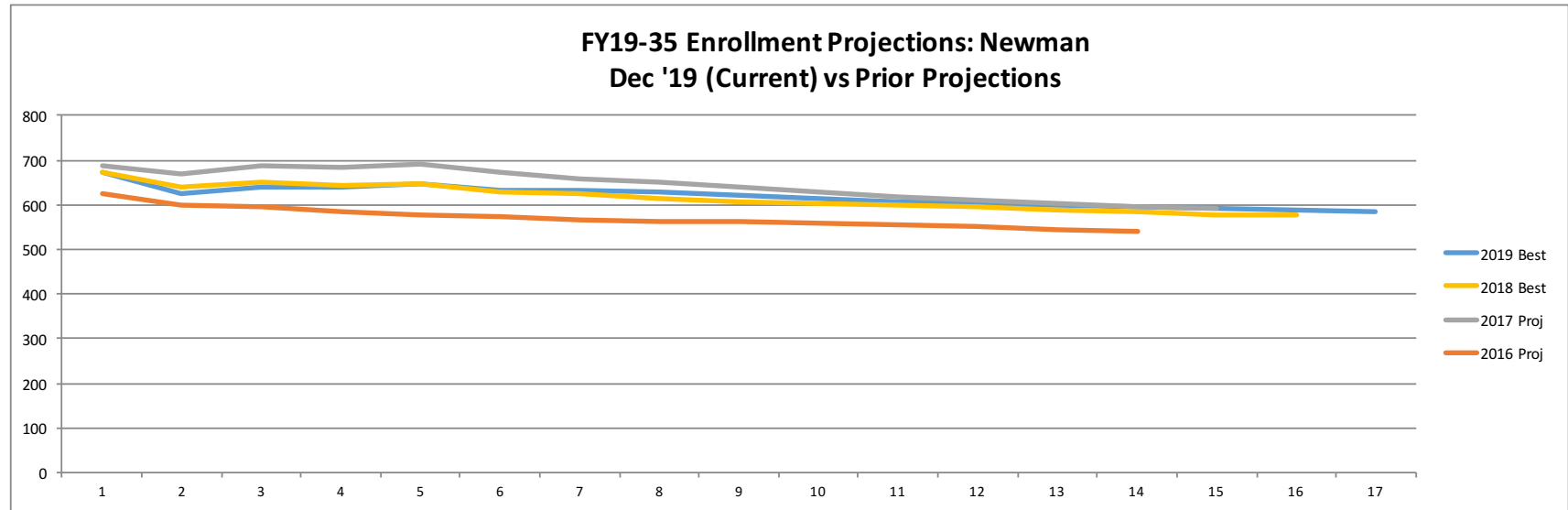


MITCHELL																						
McKibben "Best"																						
FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	74	78	82	77	68	78	65	70	70	69	69	68	68	67	67	66	67	66	66	65	65	68
1	88	75	79	91	85	69	83	71	72	72	71	71	70	70	69	69	68	68	67	67	66	66
2	79	86	79	82	92	88	70	85	72	73	74	73	73	72	72	71	71	71	71	70	70	69
3	87	78	89	80	84	94	88	71	86	73	74	75	74	74	73	73	72	73	73	73	72	72
4	88	87	78	89	79	86	94	89	72	87	74	75	76	75	75	74	74	73	74	74	74	73
5	82	86	86	76	90	81	84	95	90	73	88	75	76	77	76	76	75	75	74	75	75	75
Total K-5	498	490	493	495	498	496	484	481	462	447	450	437	437	435	432	429	427	426	425	424	422	423
Change	3	-8	3	2	3	-2	-12	-3	-19	-15	3	-13	0	-2	-3	-3	-2	-1	-1	-1	-2	1
% Change	0.6%	-1.6%	0.6%	0.4%	0.6%	-0.4%	-2.4%	-0.6%	-4.0%	-3.2%	0.7%	-2.9%	0.0%	-0.5%	-0.7%	-0.7%	-0.5%	-0.2%	-0.2%	-0.2%	-0.5%	0.2%
McKibben																						
FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
Low	498	490	493	495	498	496	484	481	462	447	450	437	437	435	432	429	427	426	425	424	422	423
Best	498	490	493	495	498	496	484	481	462	447	450	437	437	435	432	429	427	426	425	424	422	423
Inc/(Dec) Over Low	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
High	498	490	493	495	498	496	484	481	462	447	450	437	437	435	432	429	427	426	425	424	422	423
Inc/(Dec) Over Best	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

A SCHOOL AND COMMUNITY PARTNERSHIP THAT  
 CREATES EXCITED LEARNERS ~ INSPIRES EXCELLENCE ~ FOSTERS INTEGRITY



## Newman Elementary

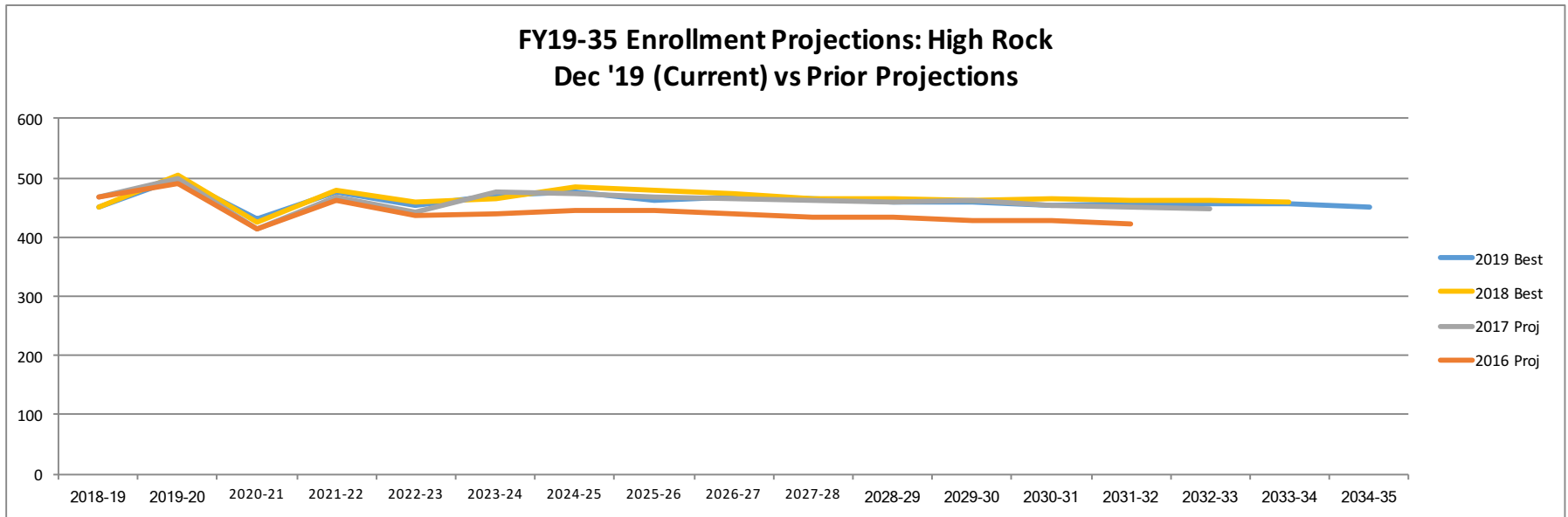


NEWMAN McKibben "Best"																						
FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	119	97	98	88	118	101	101	101	100	99	98	96	95	94	93	92	94	92	91	91	90	92
1	107	124	102	107	101	122	104	105	104	103	102	101	99	98	97	96	95	95	93	92	92	91
2	109	106	124	103	116	102	120	105	108	107	106	105	104	102	101	100	99	98	99	97	96	96
3	98	110	105	123	98	114	97	121	106	109	109	108	107	106	104	103	102	102	101	102	100	99
4	115	90	107	106	135	96	107	98	122	107	111	111	110	109	108	106	105	104	104	103	104	102
5	112	113	95	113	104	139	95	108	99	123	108	113	113	112	111	110	108	107	106	106	105	106
Total K-5	660	640	631	640	672	674	624	638	639	648	634	634	628	621	614	607	603	598	594	591	587	586
Change	30	-20	-9	9	32	2	-50	14	1	9	-14	0	-6	-7	-7	-7	-4	-5	-4	-3	-4	-1
% Change	4.8%	-3.0%	-1.4%	1.4%	5.0%	0.3%	-7.4%	2.2%	0.2%	1.4%	-2.2%	0.0%	-0.9%	-1.1%	-1.1%	-1.1%	-0.7%	-0.8%	-0.7%	-0.5%	-0.7%	-0.2%

McKibben																						
FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
Low	660	640	631	640	672	674	624	638	639	648	632	629	621	613	607	602	600	597	594	591	587	585
Best	660	640	631	640	672	674	624	638	639	648	634	634	628	621	614	607	603	598	594	591	587	586
Inc/(Dec) Over Low	-	-	-	-	-	-	-	-	-	-	2	5	7	8	7	5	3	1	-	-	-	1
High	660	640	631	640	672	674	624	638	639	648	634	634	628	621	614	607	603	598	594	591	587	586
Inc/(Dec) Over Best	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

A SCHOOL AND COMMUNITY PARTNERSHIP THAT  
CREATES EXCITED LEARNERS ~ INSPIRES EXCELLENCE ~ FOSTERS INTEGRITY

## High Rock Middle

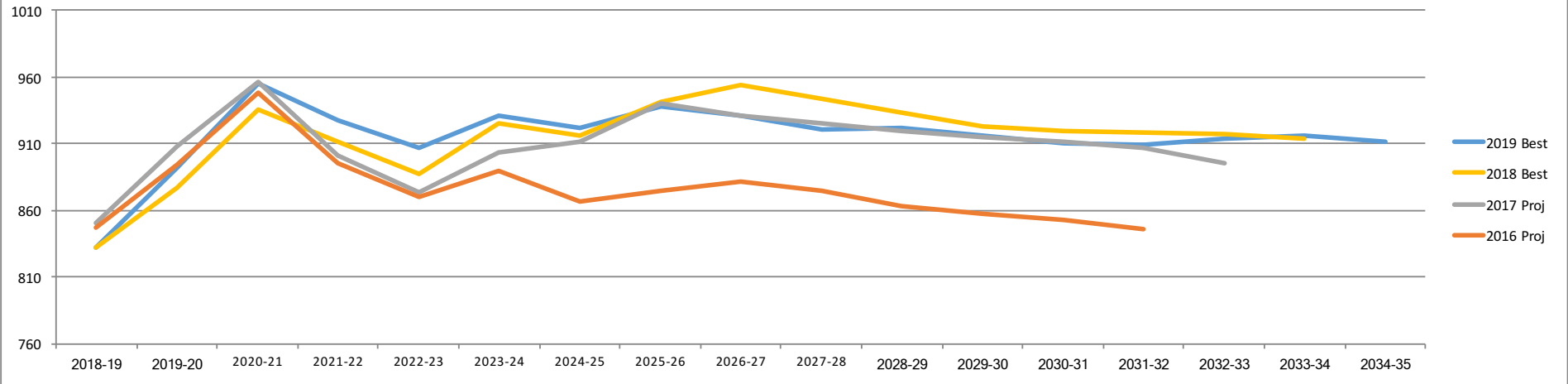


HIGH ROCK McKibben "Best" FINAL Dec '19																						
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
6	427	451	451	421	450	450	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
Total: 6	427	451	451	421	450	450	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
Change	-55	24	0	-30	29	0	49	-69	47	-23	16	7	-14	4	-3	-6	0	-5	3	-1	0	-3
% Change	-11.4%	5.6%	0.0%	-6.7%	6.9%	0.0%	10.9%	-13.8%	10.9%	-4.8%	3.5%	1.5%	-2.9%	0.9%	-0.6%	-1.3%	0.0%	-1.1%	0.7%	-0.2%	0.0%	-0.7%
McKibben FINAL Dec '19																						
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
Low	427	451	451	421	450	450	499	430	477	454	470	477	462	465	462	455	456	453	456	456	456	454
Best	427	451	451	421	450	450	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
Inc/(Dec) Over Low	-	-	-	-	-	-	-	-	-	-	-	-	1	2	2	3	2	-	-	(1)	(1)	(2)
High	427	451	451	421	450	450	499	430	477	454	470	477	463	467	465	461	461	460	465	466	464	458
Inc/(Dec) Over Best	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	3	3	7	9	11	9	6

A SCHOOL AND COMMUNITY PARTNERSHIP THAT  
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## Pollard Middle

### FY19-35 Enrollment Projections: Pollard Dec '19 (Current) vs Prior Projections

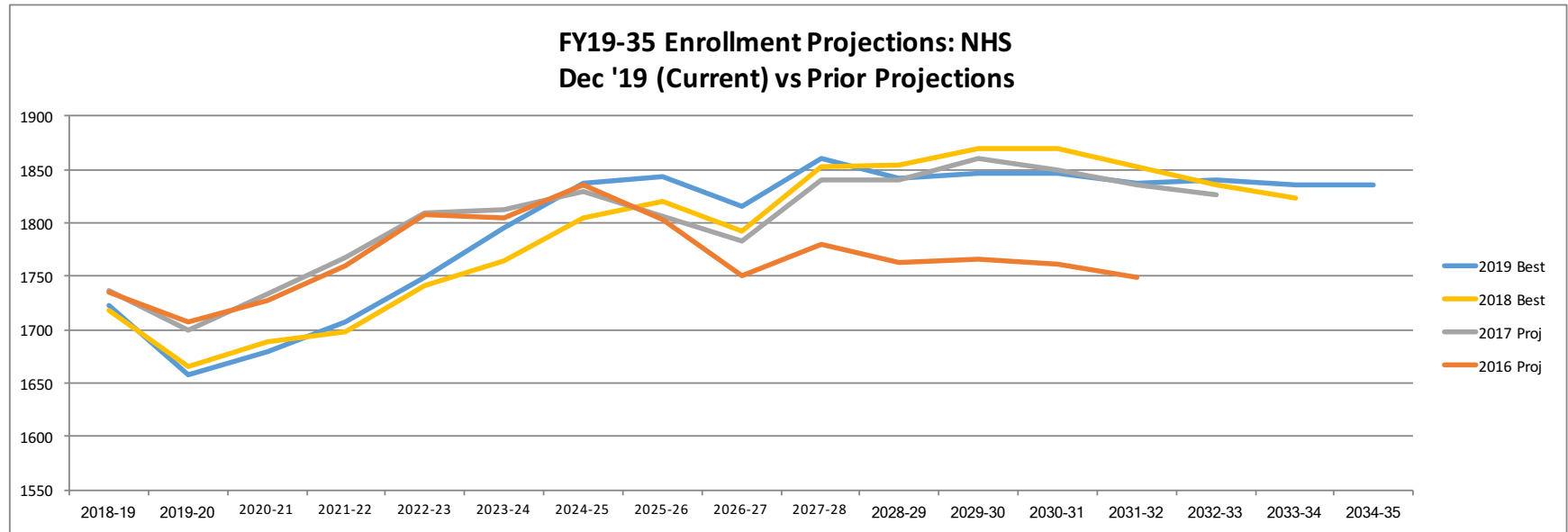


POLLARD McKibben "Best"																						
FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
7	467	404	439	445	408	440	460	504	434	482	459	468	475	461	465	462	456	456	455	461	457	457
8	404	457	400	431	446	392	432	451	494	425	472	454	463	470	456	460	460	454	454	453	459	455
<b>Total: 7-8</b>	871	861	839	876	854	832	892	955	928	907	931	922	938	931	921	922	916	910	909	914	916	912
<b>Change</b>	40	-10	-22	37	-22	-22	60	63	-27	-21	24	-9	16	-7	-10	1	-6	-6	-1	5	2	-4
<b>% Change</b>	4.8%	-1.1%	-2.6%	4.4%	-2.5%	-2.6%	7.2%	7.1%	-2.8%	-2.3%	2.6%	-1.0%	1.7%	-0.7%	-1.1%	0.1%	-0.7%	-0.7%	-0.1%	0.6%	0.2%	-0.4%

McKibben																						
FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
<b>Low</b>	871	861	839	876	854	832	892	955	928	907	931	922	938	930	918	918	911	905	907	914	917	914
<b>Best</b>	871	861	839	876	854	832	892	955	928	907	931	922	938	931	921	922	916	910	909	914	916	912
<b>Inc/(Dec) Over Low</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	1	3	4	5	5	2	-	(1)	(2)
<b>High</b>	871	861	839	876	854	832	892	955	928	907	931	922	938	931	921	923	920	916	919	930	936	932
<b>Inc/(Dec) Over Best</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	4	6	10	16	20	20

A SCHOOL AND COMMUNITY PARTNERSHIP THAT  
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## Needham High



NHS																						
McKibben "Best"																						
FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
9	414	400	449	416	435	450	380	436	456	499	429	479	461	470	477	461	465	465	461	461	460	466
10	417	418	396	446	414	428	453	376	432	451	494	425	474	456	465	472	456	463	463	459	459	458
11	382	416	407	396	441	404	421	448	372	428	446	489	421	469	451	460	467	454	461	461	457	457
12	363	389	412	401	395	436	401	417	444	368	424	442	484	417	464	446	455	462	449	456	456	452
Post Grad	6	8	8	0	0	4	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Total: 9-12	1582	1631	1672	1659	1685	1722	1658	1680	1707	1749	1796	1838	1843	1815	1860	1842	1846	1847	1837	1840	1835	1836
Change	20	49	41	-13	26	37	-64	22	27	42	47	42	5	-28	45	-18	4	1	-10	3	-5	1
% Change	1.3%	3.1%	2.5%	-0.8%	1.6%	2.2%	-3.7%	1.3%	1.6%	2.5%	2.7%	2.3%	0.3%	-1.5%	2.5%	-1.0%	0.2%	0.1%	-0.5%	0.2%	-0.3%	0.1%

McKibben																						
FINAL Dec '19	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
Low	1582	1631	1672	1659	1685	1722	1658	1677	1704	1746	1793	1835	1840	1812	1857	1838	1840	1839	1826	1828	1825	1828
Best	1582	1631	1672	1659	1685	1722	1658	1680	1707	1749	1796	1838	1843	1815	1860	1842	1846	1847	1837	1840	1835	1836
Inc/(Dec) Over Low	-	-	-	-	-	-	-	3	3	3	3	3	3	3	3	4	6	8	11	12	10	8
High	1582	1631	1672	1659	1685	1722	1658	1677	1704	1746	1793	1835	1840	1812	1857	1839	1843	1845	1838	1844	1846	1855
Inc/(Dec) Over Best	-	-	-	-	-	-	-	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(2)	1	4	11	19

A SCHOOL AND COMMUNITY PARTNERSHIP THAT  
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# **NEEDHAM PUBLIC SCHOOLS:**

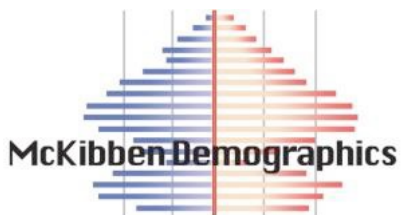
**POPULATION AND ENROLLMENT FORECASTS,  
2020-21 THROUGH 2034-35**

**DECEMBER 2019**

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## EXECUTIVE SUMMARY

1. The resident total fertility rate for Needham Public Schools over the 15-year life of the forecasts is below replacement level. (1.82 vs. the theoretical replacement level of 2.1)
2. Most in-migration to the district continues to occur in the 0-to-9 and 30-to-44 year old age groups.
3. The local 18-to-24 year old population continues to leave the district, going to college or moving to other urbanized areas. This population group accounts for the largest segment of the district's out migration flow. The second largest out flow is the 70+ age group, which are downsizing their homes and leaving the district
4. The primary factors causing the district's enrollment to rise and then stabilize over the next 15 years is the number of empty nest households (home owners age 70+) "turning over" compared to the number of homes (homeowners age 50-59) that become empty nest each year.
5. Changes in year-to-year enrollment over the next five years will primarily be due to the size of the grade cohorts entering and moving through the school system in conjunction with the size of the cohorts leaving the system.
6. The elementary enrollment will begin a slight decline after the 2023-24 school year in all three scenarios. This will be due primarily to the fact that the rising 5<sup>th</sup> grade cohorts will be greater the 440 in size while the incoming grade cohorts will decline slightly.
7. In the Low scenario, the median age of the population will increase from 42.9 in 2010 to 43.4 in 2035. In the Best scenario, the median age of the population will increase from 42.9 in 2010 to 43.5 in 2035. In the High scenario, the median age of the population will decrease from 42.0 in 2010 to 42.8 in 2035.
8. Even if the district continues to have some of annual new home construction (particularly if that construction is rental units), the rate, magnitude and price of existing home sales will become the increasingly dominant factor affecting the amount of population and enrollment change.
9. In the Low scenario, total district enrollment is forecasted to increase by 181 students, or 3.2%, between 2019-20 and 2024-25. Total enrollment is forecasted to decrease by 124 students, or -2.1%, from 2024-25 to 2029-30. The total enrollment is forecasted to decline by 66 students, or -1.1%, from 2029-30 to 2034-35.

10. In the Best scenario, total district enrollment is forecasted to increase by 186 students, or 3.3%, between 2019-20 and 2024-25. Total enrollment is forecasted to decrease by 116 students, or 2.0%, from 2024-25 to 2029-30. The total enrollment is forecasted to decline by 77 students, or -1.3%, from 2029-30 to 2034-35.
11. In the High scenario, total district enrollment is forecasted to increase by 186 students, or 3.3%, between 2019-20 and 2024-25. Total enrollment is forecasted to decrease by 59 students, or -1.0%, from 2024-25 to 2029-30. The total enrollment is forecasted to decline by 57 students, or -1.0%, from 2029-30 to 2034-35.

## INTRODUCTION



By demographic principle, distinctions are made between projections and forecasts. A projection extrapolates the past (and present) into the future with little or no attempt to take into account any factors that may impact the extrapolation (e.g., changes in fertility rates, housing patterns or migration patterns) while a forecast results when a projection is modified by reasoning to take into account the aforementioned factors.

To maximize the use of this study as a planning tool, the ultimate goal is not simply to project the past into the future, but rather to assess various factors' impact on the future. The future population and enrollment change of each school district is influenced by a variety of factors. Not all factors will influence the entire school district at the same level. Some may affect different attendance areas at dissimilar magnitudes and rates causing changes at varying points of time within the same district.

The forecaster's judgment, based on a thorough and intimate study of the district, has been used to modify the demographic trends and factors to more accurately predict likely changes. Therefore, strictly speaking, this study is a forecast, not a projection; and the amount of modification of the demographic trends varies between different areas of the district as well as within the timeframe of the forecast.

To calculate population forecasts of any type, particularly for smaller populations such as a school district, realistic suppositions must be made as to what the future will bring in terms of age specific fertility rates, mortality rates, migration rates and residents'

demographic behavior at certain points of the life course. The demographic history of the school district and its interplay with the social and economic history of the area is the starting point and basis of most of these suppositions particularly on key factors such as the age structure of the area. The unique nature of each district's and attendance area's demographic composition and rate of change over time must be assessed and understood to be factors throughout the life of the forecast series. For example, age structure, which is the variable with the greatest predictive value in regards to future population and enrollment change, is usually quite varied between different attendance areas. Moreover, no two populations, particularly at the school district, have exactly the same characteristics.

The manifest purpose of these forecasts is to ascertain the demographic factors that will ultimately influence the enrollment levels in the district's schools. There are of course, other non-demographic factors that affect enrollment levels over time. These factors include, but are not limited to transfer policies within the district; student transfers to and from neighboring districts; placement of "special programs" within school facilities that may serve students from outside the attendance area; state or federal mandates that dictate the movement of students from one facility to another (No Child Left Behind was an excellent example of this factor); the development of charter schools in the district and general area; the prevalence of home schooling in the area; and the dynamics of local private schools.

Unless the district specifically requests the calculation of forecasts that reflect the effects of changes in these non-demographic and non-economic factors, their influences are held constant for the life of the forecasts. Again, the main function of these forecasts is to determine what impact demographic changes will have on future enrollment. It is quite possible to calculate special “scenario” forecasts to measure the impact of school policy modifications as well as planned economic and financial changes. However in this case the results of these population and enrollment forecast are meant to represent the most likely scenario for changes over the next 10 years in the district and its attendance areas given the assumptions used in these forecasts.

The first part of the report will examine the assumptions made in calculating the population forecasts for the Needham Public Schools. Since the results of the population forecasts drive the subsequent enrollment forecasts, the assumptions listed in this section are paramount to understanding the area’s demographic dynamics. The remainder of the report is an explanation and analysis of the district’s population forecasts and how they will shape the district’s grade level enrollment forecasts.

## DATA

The data used for the forecasts come from a variety of sources. The Needham Public Schools provided enrollments by grade and attendance center for the school years 2010-2011 to 2019-20. Birth and death data for the years 2000 through 2018 were obtained from the Massachusetts Department of

Health. The net migration values were calculated using Internal Revenue Service migration reports for the years 2000 through 2016. The data used for the calculation of migration models came from the United States Bureau of the Census, 2005 to 2010, and the models were designed using demographic and economic factors. The base age-sex population counts used are from the results of the 2010 Census.

Recently the Census Bureau began releasing annual estimates of demographic variables at the block group and tract level from the American Community Survey (ACS). There has been wide scale reporting of these results in the national, state and local media. However, due to the methodological problems the Census Bureau is experiencing with their estimates derived from ACS data, particularly in areas with a population of less than 60,000, the results of the ACS are not used in these forecasts.

For example, given the sampling framework used by the Census Bureau, each year only 330 of the over 11,000 current households in the district would have been included. For comparison 1,500 households in the district were included in the sample for the long form questionnaire in the 2000 Census. As a result of this small sample size, the ACS survey result from the last 5 years must be aggregated to produce the tract and block group estimates.

To develop the population forecast models, past net migration patterns, household structure, current age specific fertility patterns, the magnitude and dynamics of the gross migration, the age specific mortality trends, the distribution of the population by age and sex, the rate and type of existing housing unit sales,

and future housing unit construction are considered to be primary variables. In addition, the change in household size relative to the age structure of the forecast area was addressed. While there was a slight drop in the average household size in the Needham Public Schools as well as most other areas of the state and the nation during the previous 20 years, the rate of this decline has been forecasted to slow somewhat over the next ten years.

## ASSUMPTIONS

For these forecasts, the mortality probabilities are held constant at the levels calculated for the year 2010. While the number of deaths in an area are impacted by and will change given the proportion of the local population over age 65, in the absence of an extraordinary event such as a natural disaster or a breakthrough in the treatment of heart disease, death rates rarely move rapidly in any direction, particularly at the school district or attendance area level. Thus, significant changes are not foreseen in district's mortality rates between now and the year 2034. Any increases forecasted in the number of deaths will be due primarily to the general aging of the district's population and specifically to the increase in the number of residents aged 65 and older. Given that the median age of the district is currently over 40, this will become an increasing important demographic dynamic over the next 15 years.

Similarly, fertility rates are assumed to stay fairly constant for the life of the forecasts. Like mortality rates, age specific fertility rates rarely change quickly or dramatically, particularly in

small areas. Even with the recently reported rise in the age 30 to 39 year old fertility rates of the United States, overall total fertility rates have stayed within a 10% range for most of the last 40 years. In fact, the vast majority of year to year change in an area's number of births is due to changes in the number of women in child bearing ages (particularly ages 20-34) rather than any fluctuation in an area's fertility rate.

The resident total fertility rate (TFR), the average number of births a woman will have while living in the school district during her lifetime, is estimated to be 1.82 for the total district for the ten years of the population forecasts. A TFR of 2.1 births per woman is considered to be the theoretical "replacement level" of fertility necessary for a population to remain constant in the absence of in-migration. Therefore, in the absence of migration, fertility alone would be insufficient to maintain the current level of population and enrollment within the Needham Public Schools over the course of the forecast period. It is important to note that this is a resident birth rate. Births that occur to women who then move into the district with their children are accounted for in the migration calculations.

A close examination of data for the Needham Public Schools has shown the age specific pattern of net migration will be nearly constant throughout the life of the forecasts. While the number of in and out migrants has changed in past years for the Needham Public Schools (and will change again over the next 15 years), the basic age pattern of the migrants has stayed nearly the same over the last 30 years. Based on the analysis of data it is safe to assume this age specific migration

trend will remain unchanged into the future. This pattern of migration shows most of the local out-migration occurring in the 18-to-24 year old age group as young adults leave the area to go to college or move to other urbanized areas. Hence, when a district has larger than normal 12<sup>th</sup> grade classes, they will experience a slight rise in gross out migration as these students now leave for college. The second largest group of out-migrants are those householders aged 70 and older who are downsizing their residences and then in most cases move out of the district (this is an important outflow since these downsizing seniors provide most of the homes that are in the existing housing market). The majority of the local in-migration occurs in the 0-to-9 and 30-44 age groups (the bulk of the which come from areas within 75 miles of the Needham Public Schools) primarily consisting of younger adults and their children.

As the Norfolk County area is not currently contemplating any major expansions or contractions, the forecasts also assume that the current economic, political, social, and environmental factors, as well as the transportation and public works infrastructure (with a few notable exceptions) of the Needham Public Schools and its attendance areas will remain the same through the year 2034. Below is a list of assumptions and issues that are specific to the Needham Public Schools. These issues have been used to modify the population forecast models to more accurately predict the impact of these factors on each area's population change. Specifically, the forecasts for the Needham Public Schools assume that throughout the study period:

- a. The national, state or regional economy does not go into deep recession at any time during the 10 years of the forecasts; (Deep recession is defined as four consecutive quarters where the GDP contracts greater than 1% per quarter)
- b. The interest rate for a 30-year fixed home mortgage stays below 5.0% over the 15 year life of the forecasts;
- c. The rate of mortgage approval stays at 2015-2019 levels and lenders do not return to "sub-prime" mortgage practices;
- d. There are no additional restrictions placed on home mortgage lenders or additional bankruptcies of major credit providers;
- e. The rate of housing foreclosures does not exceed 125% of the 2015-2019 average of Norfolk County for any year in the forecasts;
- f. In the Low scenario, all currently platted, and approved housing developments are built out and completed by 2033. All housing units constructed are occupied by 2034;
- g. In the Best scenario, all currently platted, and approved housing developments are built out and completed by 2033. Additionally, the 1180 Great Plain project will be built out by 2026. All housing units constructed are occupied by 2027;

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| <ul style="list-style-type: none"><li>h. In the High scenario, all aforementioned currently platted, and approved housing developments are built out and completed by 2034. Additionally, the Overlay project will be built out by 2030. All housing units constructed are occupied by 2034;</li><li>i. The unemployment rates for the Norfolk County and the Boston Metropolitan Area will remain below 4.5% for the 15 years of the forecasts;</li><li>j. The rate of students transferring into and out of the Needham Public Schools will remain at the 2015-16 to 2019-20 average;</li><li>k. The inflation rate for gasoline will stay below 5% per year for the 15 years of the forecasts;</li><li>l. The state of Massachusetts will not change any of its current laws regarding inter-district transfers, charter schools or school vouchers;</li><li>m. No charter school opens in the district or the immediate area any time over the next 15 years;</li><li>n. The town of Needham will average approximately 240 existing housing unit sales annually until 2034;</li><li>o. The apartment occupancy rate for the district stays above 95% for the 15 years of forecast cycle;</li></ul> | <ul style="list-style-type: none"><li>p. There will be no building moratorium within the district;</li><li>q. Businesses within the district and the Needham Public Schools area will remain viable;</li><li>r. The number of existing home sales in the district that are a result of “distress sales” (homes worth less than the current mortgage value) will not exceed 20% of total homes sales in the district for any given year;</li><li>s. Housing turnover rates (sale of existing homes in the district) will remain at their current levels. The majority of existing home sales are made by home owners over the age of 60;</li><li>t. The district will not experience any natural disasters over the next 15 years;</li><li>u. Private school and home school attendance rates will remain constant;</li><li>v. In the Low scenario, it is assumed all of the 136 units of the Modera development are all on line by 2024. Additionally, all of the 390 units of the Kendrick development are on line by 2025;</li><li>w. The Best scenario assumes the aforementioned developments and the 1180 Great Plain development. 1180 Great Plain development is assumed to 16 total units on line by 2017;</li></ul> |
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- x. The High scenario assumes the aforementioned development and the Overlay development. Overlay is assumed to have 250 units total, with a 5 year build out plan. All units are occupied by 2033 and the full impact on the district's enrollment will be seen by 2034;

If a major employer in the district or in the Greater Boston Metropolitan Area closes, reduces or expands its operations, the population forecasts would need to be adjusted to reflect the changes brought about by the change in economic and employment conditions. The same holds true for any major change in the local infrastructure (e.g., highway construction, water and sewer expansion, changes in zoning regulations etc.), an economic downturn, any weakness in the housing market or any instance or situation that causes rapid and dramatic population changes that could not be foreseen at the time the forecasts were calculated.

The high proportion of high school graduates from the Needham Public Schools that attend college or move to urban areas outside of the district for employment is a significant demographic factor. Their departure is a major reason for the extremely high out-migration in the 18 to 24 age group, and was taken into account when calculating these forecasts (this is also a contributing factor on why the district resident fertility rate and subsequent number of births is so low). The out-migration of graduating high school seniors is expected to continue over the period of the forecasts and the rate of out-migration has been forecasted to remain the same over the life of the forecast series.

Finally, all demographic trends (i.e., births, deaths, and migration) are assumed to be linear in nature and annualized over the forecast period. For example, if 1,000 births are forecasted for a 5-year period, an equal number, or proportion of the births are assumed to occur every year, 200 per year. Actual year-to-year variations do and will occur, but overall year to year trends are expected to be constant.

## METHODOLOGY

The population forecasts presented in this report are the result of using the Cohort-Component Method of population forecasting (Siegel, and Swanson, 2004: 561-601) (Smith et. al. 2004). As stated in the **INTRODUCTION**, the difference between a projection and a forecast is in the use of explicit judgment based upon the unique features of the area under study. Strictly speaking, a cohort projection refers to the future population that would result if a mathematical extrapolation of historical trends. Conversely, a cohort-component forecast refers to the future population that is expected because of a studied and purposeful selection of the components of change (i.e., births, deaths, and migration) and forecast models are developed to measure the impact of these changes in each specific geographic area.

Five sets of data are required to generate population and enrollment forecasts. These five data sets are:

- a. a base-year population (here, the 2010 Census population for Needham Public Schools);



- b. a set of age-specific fertility rates for the district and the attendance areas to be used over the forecast period;
- c. a set of age-specific survival (mortality) rates for the district and the attendance areas;
- d. a set of age-specific migration rates for the district and the attendance areas, and;
- e. the historical enrollment figures by grade.

The most significant and difficult aspect of producing enrollment forecasts is the generation of the population forecasts in which the school age population (and enrollment) is embedded. In turn, the most challenging aspect of generating the population forecasts is found in deriving the rates of change in fertility, mortality, and migration. From the standpoint of demographic analysis, the Needham Public Schools is classified as a “small area” population (as compared to the population of the state of Massachusetts or to that of the United States). Small area population forecasts are more complicated to calculate because local variations in fertility, mortality, and migration may be more irregular than those at the regional, state or national scale. Especially challenging is the forecast of the migration rates for local areas, because changes in the area's socioeconomic characteristics can quickly change from past and current patterns (Peters and Larkin, 2002.)

The population forecasts for Needham Public Schools were calculated

using a cohort-component method with the populations divided into male and female groups by five-year age cohorts that range from 0-to-4 years of age to 85 years of age and older (85+). Age- and sex-specific fertility, mortality, and migration models were constructed to specifically reflect the unique demographic characteristics of each of the attendance areas in the Needham Public Schools.

The enrollment forecasts were calculated using a modified average survivorship method. Average survivor rates (i.e., the proportion of students who progress from one grade level to the next given the average amount of net migration for that grade level) over the previous five years of year-to-year enrollment data were calculated for grades two through twelve. This procedure is used to identify specific grades where there are large numbers of students changing facilities for non-demographic factors, such as private school transfers or enrollment in special programs.

The survivorship rates were modified or adjusted to reflect the average rate of forecasted in and out migration of 5-to-9, 10-to-14 and 15-to-17 year old cohorts to each of the attendance centers in Needham Public Schools for the period 2010 to 2015. These survivorship rates then were adjusted to reflect the forecasted changes in age-specific migration the district should experience over the next five years. These modified survivorship rates were used to project the enrollment of grades 2 through 12 for the period 2015 to 2020. The survivorship rates were adjusted again for the period 2020 to 2025, 2025 to 2030 and 2030 to 2035 to

reflect the predicted changes in the amount of age-specific migration in the district for those time period.

The forecasted enrollments for kindergarten and first grade are derived from the 5-to-9 year old population of the age-sex population forecast at the elementary attendance center district level. This procedure allows the changes in the incoming grade sizes to be factors of forecasted population change and not an extrapolation of previous class sizes. Given the potentially large amount of variation in Kindergarten enrollment due to parental choice, changes in the state's minimum age requirement, and differing district policies on allowing children to start Kindergarten early, first grade enrollment is deemed to be a more accurate and reliable starting point for the forecasts. (McKibben, 1996) The level of the accuracy for both the total population and total enrollment forecasts at the school district level is estimated to be  $\pm 2.0\%$  for the life of the forecasts.

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## Appendix A: Population Forecasts

### Best Scenario

#### Needham Public Schools Total Population

	2010	2015	2020	2025	2030
<b>0-4</b>	1,871	1,770	1,760	1,660	1,670
<b>5-9</b>	2,488	2,260	2,370	2,340	2,260
<b>10-14</b>	2,467	2,550	2,340	2,440	2,430
<b>15-19</b>	1,863	1,960	1,910	1,770	1,820
<b>20-24</b>	981	1,090	1,060	1,090	980
<b>25-29</b>	713	770	950	890	920
<b>30-34</b>	979	1,110	1,220	1,420	1,410
<b>35-39</b>	1,755	1,380	1,610	1,580	1,830
<b>40-44</b>	2,293	1,810	1,480	1,720	1,700
<b>45-49</b>	2,523	2,270	1,780	1,500	1,790
<b>50-54</b>	2,419	2,480	2,260	1,760	1,450
<b>55-59</b>	2,045	2,380	2,440	2,210	1,750
<b>60-64</b>	1,801	1,930	2,240	2,300	2,060
<b>65-69</b>	1,185	1,620	1,690	2,000	2,070
<b>70-74</b>	874	950	1,300	1,400	1,650
<b>75-79</b>	830	760	800	1,130	1,180
<b>80-84</b>	776	800	690	740	1,040
<b>85+</b>	1,041	1,070	1,060	1,050	1,020
<b>Total</b>	<b>28,904</b>	<b>28,960</b>	<b>28,960</b>	<b>29,000</b>	<b>29,030</b>
<b>Median Age</b>	42.9	44.4	44.3	43.8	43.5
<b>Births</b>	1,070	1,080	1,120	1,160	
<b>Deaths</b>	1,410	1,490	1,510	1,580	
<b>Natural Increase</b>	-340	-410	-390	-420	
<b>Net Migration</b>	390	430	390	390	
<b>Change</b>	50	20	0	-30	

Differences between period Totals may not equal Change due to rounding.

**Broadmeadow Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	391	350	400	340	350
<b>5-9</b>	562	500	480	500	460
<b>10-14</b>	545	580	520	480	510
<b>15-19</b>	340	410	420	400	360
<b>20-24</b>	138	130	170	180	160
<b>25-29</b>	97	80	60	70	90
<b>30-34</b>	127	160	160	180	190
<b>35-39</b>	378	260	320	280	300
<b>40-44</b>	465	390	280	340	290
<b>45-49</b>	512	460	380	280	340
<b>50-54</b>	441	500	460	380	270
<b>55-59</b>	394	430	500	450	380
<b>60-64</b>	329	380	420	480	430
<b>65-69</b>	207	280	330	370	430
<b>70-74</b>	172	150	210	270	290
<b>75-79</b>	155	150	100	190	230
<b>80-84</b>	142	150	140	90	170
<b>85+</b>	107	150	160	180	150
<b>Total</b>	<b>5,498</b>	<b>5,510</b>	<b>5,510</b>	<b>5,460</b>	<b>5,400</b>
<b>Median Age</b>	41.9	43.7	44.0	44.4	44.8
<b>Births</b>	170	160	170	170	
<b>Deaths</b>	230	250	270	270	
<b>Natural Increase</b>	-60	-90	-100	-100	
<b>Net Migration</b>	70	80	60	60	
<b>Change</b>	10	-10	-40	-40	

*Differences between period Totals may not equal Change due to rounding.*

**Eliot Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	281	290	280	310	310
<b>5-9</b>	370	350	360	390	410
<b>10-14</b>	350	380	370	380	420
<b>15-19</b>	245	300	320	280	280
<b>20-24</b>	142	170	170	160	160
<b>25-29</b>	157	160	210	210	200
<b>30-34</b>	225	230	260	340	360
<b>35-39</b>	279	280	300	300	410
<b>40-44</b>	385	270	280	300	330
<b>45-49</b>	369	380	270	280	300
<b>50-54</b>	384	360	380	270	270
<b>55-59</b>	306	380	360	370	270
<b>60-64</b>	245	260	320	300	300
<b>65-69</b>	160	200	210	270	240
<b>70-74</b>	137	120	150	190	210
<b>75-79</b>	165	110	110	130	130
<b>80-84</b>	141	160	90	100	120
<b>85+</b>	197	200	200	180	160
<b>Total</b>	<b>4,537</b>	<b>4,600</b>	<b>4,640</b>	<b>4,760</b>	<b>4,880</b>
<b>Median Age</b>	42.8	42.6	40.9	40.2	38.7
<b>Births</b>	200	210	220	240	
<b>Deaths</b>	240	250	230	230	
<b>Natural Increase</b>	-40	-40	-10	10	
<b>Net Migration</b>	90	90	110	110	
<b>Change</b>	50	50	100	120	

*Differences between period Totals may not equal Change due to rounding.*

**Sunita Williams Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	341	350	350	320	300
<b>5-9</b>	410	410	460	440	420
<b>10-14</b>	373	420	410	470	460
<b>15-19</b>	445	300	220	290	350
<b>20-24</b>	353	300	230	180	240
<b>25-29</b>	191	240	230	170	120
<b>30-34</b>	230	280	320	290	230
<b>35-39</b>	337	350	420	420	390
<b>40-44</b>	416	370	350	420	420
<b>45-49</b>	475	410	360	350	420
<b>50-54</b>	463	470	410	360	340
<b>55-59</b>	388	460	460	400	360
<b>60-64</b>	362	370	440	440	380
<b>65-69</b>	238	330	340	390	400
<b>70-74</b>	179	200	290	270	320
<b>75-79</b>	165	160	180	230	230
<b>80-84</b>	217	160	140	170	210
<b>85+</b>	449	390	330	280	260
<b>Total</b>	<b>6,030</b>	<b>5,970</b>	<b>5,940</b>	<b>5,890</b>	<b>5,850</b>
<b>Median Age</b>	44.0	44.5	44.7	44.3	44.9
<b>Births</b>	280	270	250	250	
<b>Deaths</b>	400	370	350	350	
<b>Natural Increase</b>	-120	-100	-100	-100	
<b>Net Migration</b>	60	70	60	60	
<b>Change</b>	-60	-30	-40	-40	

*Differences between period Totals may not equal Change due to rounding.*

**Mitchell Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	344	270	260	240	260
<b>5-9</b>	461	420	440	400	380
<b>10-14</b>	417	470	440	460	410
<b>15-19</b>	270	350	410	380	400
<b>20-24</b>	120	140	170	230	180
<b>25-29</b>	85	70	80	90	110
<b>30-34</b>	148	170	160	160	180
<b>35-39</b>	294	190	220	200	220
<b>40-44</b>	400	310	210	260	230
<b>45-49</b>	407	400	310	230	290
<b>50-54</b>	383	400	390	300	220
<b>55-59</b>	351	380	390	390	300
<b>60-64</b>	299	340	360	370	370
<b>65-69</b>	174	270	280	340	360
<b>70-74</b>	116	130	210	250	300
<b>75-79</b>	86	100	100	190	220
<b>80-84</b>	79	80	100	90	170
<b>85+</b>	88	100	110	120	120
<b>Total</b>	<b>4,521</b>	<b>4,590</b>	<b>4,640</b>	<b>4,700</b>	<b>4,720</b>
<b>Median Age</b>	41.5	43.5	43.3	43.7	44.8
<b>Births</b>	160	150	170	180	
<b>Deaths</b>	170	190	210	230	
<b>Natural Increase</b>	-10	-40	-40	-50	
<b>Net Migration</b>	80	90	70	70	
<b>Change</b>	70	50	30	20	

*Differences between period Totals may not equal Change due to rounding.*

## Newman Elementary Total Population

	2010	2015	2020	2025	2030
<b>0-4</b>	514	510	470	450	450
<b>5-9</b>	685	580	630	610	590
<b>10-14</b>	783	700	600	650	630
<b>15-19</b>	563	600	540	420	430
<b>20-24</b>	230	350	320	340	240
<b>25-29</b>	183	220	370	350	400
<b>30-34</b>	249	270	320	450	450
<b>35-39</b>	467	300	350	380	510
<b>40-44</b>	628	470	360	400	430
<b>45-49</b>	761	620	460	360	440
<b>50-54</b>	749	750	620	450	350
<b>55-59</b>	607	730	730	600	440
<b>60-64</b>	566	580	700	710	580
<b>65-69</b>	406	540	530	630	640
<b>70-74</b>	271	350	440	420	530
<b>75-79</b>	259	240	310	390	370
<b>80-84</b>	197	250	220	290	370
<b>85+</b>	201	230	260	290	330
<b>Total</b>	<b>8,319</b>	<b>8,290</b>	<b>8,230</b>	<b>8,190</b>	<b>8,180</b>
<b>Median Age</b>	43.9	46.2	46.7	45.6	44.5
<b>Births</b>	260	290	310	320	
<b>Deaths</b>	370	430	450	500	
<b>Natural Increase</b>	-110	-140	-140	-180	
<b>Net Migration</b>	90	100	90	90	
<b>Change</b>	-20	-40	-50	-90	

*Differences between period Totals may not equal Change due to rounding.*

## Low Scenario

### Needham Public Schools Total Population

	2010	2015	2020	2025	2030
<b>0-4</b>	1,871	1,770	1,760	1,650	1,660
<b>5-9</b>	2,488	2,260	2,370	2,320	2,240
<b>10-14</b>	2,467	2,550	2,340	2,440	2,410
<b>15-19</b>	1,863	1,960	1,910	1,790	1,840
<b>20-24</b>	981	1,090	1,060	1,110	1,020
<b>25-29</b>	713	770	950	890	940
<b>30-34</b>	979	1,110	1,220	1,420	1,390
<b>35-39</b>	1,755	1,380	1,610	1,580	1,810
<b>40-44</b>	2,293	1,810	1,480	1,720	1,690
<b>45-49</b>	2,523	2,270	1,780	1,500	1,770
<b>50-54</b>	2,419	2,480	2,260	1,760	1,450
<b>55-59</b>	2,045	2,380	2,440	2,210	1,750
<b>60-64</b>	1,801	1,930	2,240	2,300	2,060
<b>65-69</b>	1,185	1,620	1,690	2,010	2,070
<b>70-74</b>	874	950	1,300	1,410	1,650
<b>75-79</b>	830	760	800	1,130	1,190
<b>80-84</b>	776	800	690	740	1,040
<b>85+</b>	1,041	1,070	1,060	1,050	1,020
<b>Total</b>	<b>28,904</b>	<b>28,960</b>	<b>28,960</b>	<b>29,030</b>	<b>29,000</b>
<b>Median Age</b>	42.9	44.4	44.3	43.8	43.5
<b>Births</b>	1,070	1,080	1,120	1,170	
<b>Deaths</b>	1,410	1,490	1,510	1,580	
<b>Natural Increase</b>	-340	-410	-390	-410	
<b>Net Migration</b>	390	430	380	380	
<b>Change</b>	50	20	-10	-30	

Differences between period Totals may not equal Change due to rounding.

**Broadmeadow Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	391	350	400	340	350
<b>5-9</b>	562	500	480	500	460
<b>10-14</b>	545	580	520	480	510
<b>15-19</b>	340	410	420	400	360
<b>20-24</b>	138	130	170	180	160
<b>25-29</b>	97	80	60	70	90
<b>30-34</b>	127	160	160	180	190
<b>35-39</b>	378	260	320	280	300
<b>40-44</b>	465	390	280	340	290
<b>45-49</b>	512	460	380	280	340
<b>50-54</b>	441	500	460	380	270
<b>55-59</b>	394	430	500	450	380
<b>60-64</b>	329	380	420	480	430
<b>65-69</b>	207	280	330	370	430
<b>70-74</b>	172	150	210	270	290
<b>75-79</b>	155	150	100	190	230
<b>80-84</b>	142	150	140	90	170
<b>85+</b>	107	150	160	180	150
<b>Total</b>	<b>5,498</b>	<b>5,510</b>	<b>5,510</b>	<b>5,460</b>	<b>5,400</b>
<b>Median Age</b>	41.9	43.7	44.0	44.4	44.8
<b>Births</b>	170	160	170	170	
<b>Deaths</b>	230	250	270	270	
<b>Natural Increase</b>	-60	-90	-100	-100	
<b>Net Migration</b>	70	80	60	60	
<b>Change</b>	10	-10	-40	-40	

*Differences between period Totals may not equal Change due to rounding.*



**Eliot Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	281	290	280	310	310
<b>5-9</b>	370	350	360	390	410
<b>10-14</b>	350	380	370	380	420
<b>15-19</b>	245	300	320	280	280
<b>20-24</b>	142	170	170	160	160
<b>25-29</b>	157	160	210	210	200
<b>30-34</b>	225	230	260	340	360
<b>35-39</b>	279	280	300	300	410
<b>40-44</b>	385	270	280	300	330
<b>45-49</b>	369	380	270	280	300
<b>50-54</b>	384	360	380	270	270
<b>55-59</b>	306	380	360	370	270
<b>60-64</b>	245	260	320	300	300
<b>65-69</b>	160	200	210	270	240
<b>70-74</b>	137	120	150	190	210
<b>75-79</b>	165	110	110	130	130
<b>80-84</b>	141	160	90	100	120
<b>85+</b>	197	200	200	180	160
<b>Total</b>	<b>4,537</b>	<b>4,600</b>	<b>4,640</b>	<b>4,760</b>	<b>4,880</b>
<b>Median Age</b>	42.8	42.6	40.9	40.2	38.7
<b>Births</b>	200	210	220	240	
<b>Deaths</b>	240	250	230	230	
<b>Natural Increase</b>	-40	-40	-10	10	
<b>Net Migration</b>	90	90	110	110	
<b>Change</b>	50	50	100	120	

*Differences between period Totals may not equal Change due to rounding.*

**Sunita Williams Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	341	350	350	320	300
<b>5-9</b>	410	410	460	440	420
<b>10-14</b>	373	420	410	470	460
<b>15-19</b>	445	300	220	290	350
<b>20-24</b>	353	300	230	180	240
<b>25-29</b>	191	240	230	170	120
<b>30-34</b>	230	280	320	290	230
<b>35-39</b>	337	350	420	420	390
<b>40-44</b>	416	370	350	420	420
<b>45-49</b>	475	410	360	350	420
<b>50-54</b>	463	470	410	360	340
<b>55-59</b>	388	460	460	400	360
<b>60-64</b>	362	370	440	440	380
<b>65-69</b>	238	330	340	390	400
<b>70-74</b>	179	200	290	270	320
<b>75-79</b>	165	160	180	230	230
<b>80-84</b>	217	160	140	170	210
<b>85+</b>	449	390	330	280	260
<b>Total</b>	<b>6,030</b>	<b>5,970</b>	<b>5,940</b>	<b>5,890</b>	<b>5,850</b>
<b>Median Age</b>	44.0	44.5	44.7	44.3	44.9
<b>Births</b>	280	270	250	250	
<b>Deaths</b>	400	370	350	350	
<b>Natural Increase</b>	-120	-100	-100	-100	
<b>Net Migration</b>	60	70	60	60	
<b>Change</b>	-60	-30	-40	-40	

*Differences between period Totals may not equal Change due to rounding.*

**Mitchell Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	344	270	260	240	260
<b>5-9</b>	461	420	440	400	380
<b>10-14</b>	417	470	440	460	410
<b>15-19</b>	270	350	410	380	400
<b>20-24</b>	120	140	170	230	180
<b>25-29</b>	85	70	80	90	110
<b>30-34</b>	148	170	160	160	180
<b>35-39</b>	294	190	220	200	220
<b>40-44</b>	400	310	210	260	230
<b>45-49</b>	407	400	310	230	290
<b>50-54</b>	383	400	390	300	220
<b>55-59</b>	351	380	390	390	300
<b>60-64</b>	299	340	360	370	370
<b>65-69</b>	174	270	280	340	360
<b>70-74</b>	116	130	210	250	300
<b>75-79</b>	86	100	100	190	220
<b>80-84</b>	79	80	100	90	170
<b>85+</b>	88	100	110	120	120
<b>Total</b>	<b>4,521</b>	<b>4,590</b>	<b>4,640</b>	<b>4,700</b>	<b>4,720</b>
<b>Median Age</b>	41.5	43.5	43.3	43.7	44.8
<b>Births</b>	160	150	170	180	
<b>Deaths</b>	170	190	210	230	
<b>Natural Increase</b>	-10	-40	-40	-50	
<b>Net Migration</b>	80	90	70	70	
<b>Change</b>	70	50	30	20	

*Differences between period Totals may not equal Change due to rounding.*

**Newman Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	514	510	470	440	440
<b>5-9</b>	685	580	630	590	570
<b>10-14</b>	783	700	600	650	610
<b>15-19</b>	563	600	540	440	450
<b>20-24</b>	230	350	320	360	280
<b>25-29</b>	183	220	370	350	420
<b>30-34</b>	249	270	320	450	430
<b>35-39</b>	467	300	350	380	490
<b>40-44</b>	628	470	360	400	420
<b>45-49</b>	761	620	460	360	420
<b>50-54</b>	749	750	620	450	350
<b>55-59</b>	607	730	730	600	440
<b>60-64</b>	566	580	700	710	580
<b>65-69</b>	406	540	530	640	640
<b>70-74</b>	271	350	440	430	530
<b>75-79</b>	259	240	310	390	380
<b>80-84</b>	197	250	220	290	370
<b>85+</b>	201	230	260	290	330
<b>Total</b>	<b>8,319</b>	<b>8,290</b>	<b>8,230</b>	<b>8,220</b>	<b>8,150</b>
<b>Median Age</b>	43.9	46.2	46.7	45.7	44.6
<b>Births</b>	260	290	310	330	
<b>Deaths</b>	370	430	450	500	
<b>Natural Increase</b>	-110	-140	-140	-170	
<b>Net Migration</b>	90	100	80	80	
<b>Change</b>	-20	-40	-60	-90	

*Differences between period Totals may not equal Change due to rounding.*

## High Scenario

### Needham Public Schools Total Population

	2010	2015	2020	2025	2030
<b>0-4</b>	1,871	1,770	1,760	1,660	1,740
<b>5-9</b>	2,488	2,260	2,390	2,340	2,300
<b>10-14</b>	2,467	2,550	2,340	2,460	2,450
<b>15-19</b>	1,863	1,960	1,910	1,770	1,790
<b>20-24</b>	981	1,090	1,060	1,090	1,010
<b>25-29</b>	713	770	950	890	1,080
<b>30-34</b>	979	1,110	1,200	1,420	1,450
<b>35-39</b>	1,755	1,380	1,610	1,580	1,850
<b>40-44</b>	2,293	1,810	1,480	1,720	1,650
<b>45-49</b>	2,523	2,270	1,780	1,500	1,790
<b>50-54</b>	2,419	2,480	2,260	1,760	1,450
<b>55-59</b>	2,045	2,380	2,440	2,210	1,750
<b>60-64</b>	1,801	1,930	2,240	2,300	2,020
<b>65-69</b>	1,185	1,620	1,690	2,000	2,020
<b>70-74</b>	874	950	1,300	1,400	1,620
<b>75-79</b>	830	760	800	1,130	1,160
<b>80-84</b>	776	800	690	740	1,040
<b>85+</b>	1,041	1,070	1,060	1,050	1,020
<b>Total</b>	<b>28,904</b>	<b>28,960</b>	<b>28,960</b>	<b>29,020</b>	<b>29,190</b>
<b>Median Age</b>	42.9	44.4	44.3	43.8	42.8
<b>Births</b>	1,070	1,080	1,120	1,200	
<b>Deaths</b>	1,410	1,490	1,510	1,580	
<b>Natural Increase</b>	-340	-410	-390	-380	
<b>Net Migration</b>	390	430	390	390	
<b>Change</b>	50	20	0	10	

Differences between period Totals may not equal Change due to rounding.

**Broadmeadow Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	391	350	400	340	350
<b>5-9</b>	562	500	480	500	460
<b>10-14</b>	545	580	520	480	510
<b>15-19</b>	340	410	420	400	360
<b>20-24</b>	138	130	170	180	160
<b>25-29</b>	97	80	60	70	90
<b>30-34</b>	127	160	160	180	190
<b>35-39</b>	378	260	320	280	300
<b>40-44</b>	465	390	280	340	290
<b>45-49</b>	512	460	380	280	340
<b>50-54</b>	441	500	460	380	270
<b>55-59</b>	394	430	500	450	380
<b>60-64</b>	329	380	420	480	430
<b>65-69</b>	207	280	330	370	430
<b>70-74</b>	172	150	210	270	290
<b>75-79</b>	155	150	100	190	230
<b>80-84</b>	142	150	140	90	170
<b>85+</b>	107	150	160	180	150
<b>Total</b>	<b>5,498</b>	<b>5,510</b>	<b>5,510</b>	<b>5,460</b>	<b>5,400</b>
<b>Median Age</b>	41.9	43.7	44.0	44.4	44.8
<b>Births</b>	170	160	170	170	
<b>Deaths</b>	230	250	270	270	
<b>Natural Increase</b>	-60	-90	-100	-100	
<b>Net Migration</b>	70	80	60	60	
<b>Change</b>	10	-10	-40	-40	

*Differences between period Totals may not equal Change due to rounding.*

**Eliot Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	281	290	280	310	380
<b>5-9</b>	370	350	380	390	450
<b>10-14</b>	350	380	370	400	440
<b>15-19</b>	245	300	320	280	250
<b>20-24</b>	142	170	170	160	190
<b>25-29</b>	157	160	210	210	360
<b>30-34</b>	225	230	240	340	400
<b>35-39</b>	279	280	300	300	430
<b>40-44</b>	385	270	280	300	280
<b>45-49</b>	369	380	270	280	300
<b>50-54</b>	384	360	380	270	270
<b>55-59</b>	306	380	360	370	270
<b>60-64</b>	245	260	320	300	260
<b>65-69</b>	160	200	210	270	190
<b>70-74</b>	137	120	150	190	180
<b>75-79</b>	165	110	110	130	110
<b>80-84</b>	141	160	90	100	120
<b>85+</b>	197	200	200	180	160
<b>Total</b>	<b>4,537</b>	<b>4,600</b>	<b>4,640</b>	<b>4,780</b>	<b>5,040</b>
<b>Median Age</b>	42.8	42.6	40.9	40.0	35.6
<b>Births</b>	200	210	220	280	
<b>Deaths</b>	240	250	230	230	
<b>Natural Increase</b>	-40	-40	-10	50	
<b>Net Migration</b>	90	90	110	110	
<b>Change</b>	50	50	100	160	

*Differences between period Totals may not equal Change due to rounding.*

**Sunita Williams Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	341	350	350	320	300
<b>5-9</b>	410	410	460	440	420
<b>10-14</b>	373	420	410	470	460
<b>15-19</b>	445	300	220	290	350
<b>20-24</b>	353	300	230	180	240
<b>25-29</b>	191	240	230	170	120
<b>30-34</b>	230	280	320	290	230
<b>35-39</b>	337	350	420	420	390
<b>40-44</b>	416	370	350	420	420
<b>45-49</b>	475	410	360	350	420
<b>50-54</b>	463	470	410	360	340
<b>55-59</b>	388	460	460	400	360
<b>60-64</b>	362	370	440	440	380
<b>65-69</b>	238	330	340	390	400
<b>70-74</b>	179	200	290	270	320
<b>75-79</b>	165	160	180	230	230
<b>80-84</b>	217	160	140	170	210
<b>85+</b>	449	390	330	280	260
<b>Total</b>	<b>6,030</b>	<b>5,970</b>	<b>5,940</b>	<b>5,890</b>	<b>5,850</b>
<b>Median Age</b>	44.0	44.5	44.7	44.3	44.9
<b>Births</b>	280	270	250	250	
<b>Deaths</b>	400	370	350	350	
<b>Natural Increase</b>	-120	-100	-100	-100	
<b>Net Migration</b>	60	70	60	60	
<b>Change</b>	-60	-30	-40	-40	

*Differences between period Totals may not equal Change due to rounding.*



**Mitchell Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	344	270	260	240	260
<b>5-9</b>	461	420	440	400	380
<b>10-14</b>	417	470	440	460	410
<b>15-19</b>	270	350	410	380	400
<b>20-24</b>	120	140	170	230	180
<b>25-29</b>	85	70	80	90	110
<b>30-34</b>	148	170	160	160	180
<b>35-39</b>	294	190	220	200	220
<b>40-44</b>	400	310	210	260	230
<b>45-49</b>	407	400	310	230	290
<b>50-54</b>	383	400	390	300	220
<b>55-59</b>	351	380	390	390	300
<b>60-64</b>	299	340	360	370	370
<b>65-69</b>	174	270	280	340	360
<b>70-74</b>	116	130	210	250	300
<b>75-79</b>	86	100	100	190	220
<b>80-84</b>	79	80	100	90	170
<b>85+</b>	88	100	110	120	120
<b>Total</b>	<b>4,521</b>	<b>4,590</b>	<b>4,640</b>	<b>4,700</b>	<b>4,720</b>
<b>Median Age</b>	41.5	43.5	43.3	43.7	44.8
<b>Births</b>	160	150	170	180	
<b>Deaths</b>	170	190	210	230	
<b>Natural Increase</b>	-10	-40	-40	-50	
<b>Net Migration</b>	80	90	70	70	
<b>Change</b>	70	50	30	20	

*Differences between period Totals may not equal Change due to rounding.*

**Newman Elementary Total Population**

	2010	2015	2020	2025	2030
<b>0-4</b>	514	510	470	450	450
<b>5-9</b>	685	580	630	610	590
<b>10-14</b>	783	700	600	650	630
<b>15-19</b>	563	600	540	420	430
<b>20-24</b>	230	350	320	340	240
<b>25-29</b>	183	220	370	350	400
<b>30-34</b>	249	270	320	450	450
<b>35-39</b>	467	300	350	380	510
<b>40-44</b>	628	470	360	400	430
<b>45-49</b>	761	620	460	360	440
<b>50-54</b>	749	750	620	450	350
<b>55-59</b>	607	730	730	600	440
<b>60-64</b>	566	580	700	710	580
<b>65-69</b>	406	540	530	630	640
<b>70-74</b>	271	350	440	420	530
<b>75-79</b>	259	240	310	390	370
<b>80-84</b>	197	250	220	290	370
<b>85+</b>	201	230	260	290	330
<b>Total</b>	<b>8,319</b>	<b>8,290</b>	<b>8,230</b>	<b>8,190</b>	<b>8,180</b>
<b>Median Age</b>	43.9	46.2	46.7	45.6	44.5
<b>Births</b>	260	290	310	320	
<b>Deaths</b>	370	430	450	500	
<b>Natural Increase</b>	-110	-140	-140	-180	
<b>Net Migration</b>	90	100	90	90	
<b>Change</b>	-20	-40	-50	-90	

*Differences between period Totals may not equal Change due to rounding.*

## Appendix B: Enrollment Forecasts

### Best Scenario

#### Needham Public Schools Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
PK	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72
K	390	410	408	404	402	398	395	390	387	382	383	378	376	373	371	380
1	436	420	423	421	417	414	409	406	401	398	392	390	385	383	380	378
2	441	448	433	435	433	429	426	420	418	413	411	406	406	401	399	396
3	434	448	455	439	443	442	438	436	431	429	424	423	420	420	414	412
4	463	440	454	460	445	449	448	442	441	435	435	432	432	429	429	423
5	422	468	445	459	465	452	456	453	447	447	440	443	442	442	439	439
Total: K-5	2586	2634	2618	2618	2605	2584	2572	2547	2525	2504	2485	2472	2461	2448	2432	2428
6	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
7	460	504	434	482	459	468	475	461	465	462	456	456	455	461	457	457
8	432	451	494	425	472	454	463	470	456	460	460	454	454	453	459	455
Total: 7-8	892	955	928	907	931	922	938	931	921	922	916	910	909	914	916	912
9	380	436	456	499	429	479	461	470	477	461	465	465	461	461	460	466
10	453	376	432	451	494	425	474	456	465	472	456	463	463	459	459	458
11	421	448	372	428	446	489	421	469	451	460	467	454	461	461	457	457
12	401	417	444	368	424	442	484	417	464	446	455	462	449	456	456	452
SP	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Total: 9-12	1658	1680	1707	1749	1796	1838	1843	1815	1860	1842	1846	1847	1837	1840	1835	1836
Total: K-12	5707	5771	5802	5800	5874	5893	5888	5832	5842	5798	5777	5754	5735	5729	5710	5700
Change		64	31	-2	74	19	-5	-56	10	-44	-21	-23	-19	-6	-19	-10
%Change		1.1%	0.5%	0.0%	1.3%	0.3%	-0.1%	-1.0%	0.2%	-0.8%	-0.4%	-0.4%	-0.3%	-0.1%	-0.3%	-0.2%
Total: K-5	2586	2634	2618	2618	2605	2584	2572	2547	2525	2504	2485	2472	2461	2448	2432	2428
Change		48	-16	0	-13	-21	-12	-25	-22	-21	-19	-13	-11	-13	-16	-4
%Change		1.9%	-0.6%	0.0%	-0.5%	-0.8%	-0.5%	-1.0%	-0.9%	-0.8%	-0.8%	-0.5%	-0.4%	-0.5%	-0.7%	-0.2%
Total: 6	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
Change		-69	47	-23	16	7	-14	4	-3	-6	0	-5	3	-1	0	-3
%Change		-14%	10.9%	-4.8%	3.5%	1.5%	-2.9%	0.9%	-0.6%	-1.3%	0.0%	-1.1%	0.7%	-0.2%	0.0%	-0.7%
Total: 7-8	892	955	928	907	931	922	938	931	921	922	916	910	909	914	916	912
Change		63	-27	-21	24	-9	16	-7	-10	1	-6	-6	-1	5	2	-4
%Change		7.1%	-2.8%	-2.3%	2.6%	-1.0%	1.7%	-0.7%	-1.1%	0.1%	-0.7%	-0.7%	-0.1%	0.6%	0.2%	-0.4%
Total: 9-12	1658	1680	1707	1749	1796	1838	1843	1815	1860	1842	1846	1847	1837	1840	1835	1836
Change		22	27	42	47	42	5	-28	45	-18	4	1	-10	3	-5	1
%Change		1.3%	1.6%	2.5%	2.7%	2.3%	0.3%	-1.5%	2.5%	-1.0%	0.2%	0.1%	-0.5%	0.2%	-0.3%	0.1%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

# Needham Public Schools Demographic Study –December 2019

## Broadmeadow Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	77	86	86	85	84	84	83	82	81	80	79	79	78	78	77	78
1	102	86	89	89	88	87	87	86	85	84	82	81	81	80	80	79
2	84	105	89	92	92	91	90	90	89	88	87	84	84	84	83	83
3	95	86	107	91	95	95	94	94	94	93	92	90	88	88	87	86
4	97	96	87	108	92	96	96	93	93	93	92	93	91	89	89	88
5	93	98	97	88	109	93	97	95	92	92	92	93	94	92	90	90
Total K-5	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
Total K-5	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
Change %		9	-2	-2	7	-14	1	-7	-6	-4	-6	-4	-4	-5	-5	-2
Change		1.6%	-0.4%	-0.4%	1.3%	-2.5%	0.2%	-1.3%	-1.1%	-0.7%	-1.1%	-0.8%	-0.8%	-1.0%	-1.0%	-0.4%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## Eliot Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	64	70	70	69	69	69	69	68	67	66	65	64	64	63	63	65
1	67	71	72	72	71	71	70	70	69	68	67	66	65	65	64	64
2	75	70	74	74	73	72	72	71	72	71	70	70	69	68	68	67
3	61	77	72	75	75	74	73	73	73	74	73	72	72	71	70	70
4	73	63	79	73	76	76	75	74	75	74	75	74	74	74	73	72
5	72	74	64	80	74	77	77	76	75	77	75	77	76	76	76	75
Total K-5	412	425	431	443	438	439	436	432	431	430	425	423	420	417	414	413
Total K-5	412	425	431	443	438	439	436	432	431	430	425	423	420	417	414	413
Change %		13	6	12	-5	1	-3	-4	-1	-1	-5	-2	-3	-3	-3	-1
Change		3.2%	1.4%	2.8%	-1.1%	0.2%	-0.7%	-0.9%	-0.2%	-0.2%	-1.2%	-0.5%	-0.7%	-0.7%	-0.7%	-0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

**Sunita Williams Elementary: Total Enrollment**

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	83	83	82	82	82	81	80	79	79	78	78	77	77	76	76	77
1	80	87	86	85	85	84	83	82	81	81	80	80	79	79	78	78
2	92	83	90	89	88	88	87	85	84	83	84	83	83	82	82	81
3	93	93	84	91	90	90	90	89	87	86	85	86	86	86	85	85
4	92	94	94	85	92	91	91	91	90	88	89	88	89	89	89	88
5	78	93	95	95	86	94	93	93	93	92	90	91	92	93	93	93
<b>Total K-5</b>	<b>518</b>	<b>533</b>	<b>531</b>	<b>527</b>	<b>523</b>	<b>528</b>	<b>524</b>	<b>519</b>	<b>514</b>	<b>508</b>	<b>506</b>	<b>505</b>	<b>506</b>	<b>505</b>	<b>503</b>	<b>502</b>
<b>Total K-5</b>	<b>518</b>	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
<b>Change %</b>		15	-2	-4	-4	5	-4	-5	-5	-6	-2	-1	1	-1	-2	-1
<b>Change</b>		2.9%	-0.4%	-0.8%	-0.8%	1.0%	-0.8%	-1.0%	-1.0%	-1.2%	-0.4%	-0.2%	0.2%	-0.2%	-0.4%	-0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

**Mitchell Elementary: Total Enrollment**

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	65	70	70	69	69	68	68	67	67	66	67	66	66	65	65	68
1	83	71	72	72	71	71	70	70	69	69	68	68	67	67	66	66
2	70	85	72	73	74	73	73	72	72	71	71	71	71	70	70	69
3	88	71	86	73	74	75	74	74	73	73	72	73	73	73	72	72
4	94	89	72	87	74	75	76	75	75	74	74	73	74	74	74	73
5	84	95	90	73	88	75	76	77	76	76	75	75	74	75	75	75
<b>Total K-5</b>	<b>484</b>	<b>481</b>	<b>462</b>	<b>447</b>	<b>450</b>	<b>437</b>	<b>437</b>	<b>435</b>	<b>432</b>	<b>429</b>	<b>427</b>	<b>426</b>	<b>425</b>	<b>424</b>	<b>422</b>	<b>423</b>
<b>Total K-5</b>	<b>484</b>	481	462	447	450	437	437	435	432	429	427	426	425	424	422	423
<b>Change %</b>		-3	-19	-15	3	-13	0	-2	-3	-3	-2	-1	-1	-1	-2	1
<b>Change</b>		-0.6%	-4.0%	-3.2%	0.7%	-2.9%	0.0%	-0.5%	-0.7%	-0.7%	-0.5%	-0.2%	-0.2%	-0.2%	-0.5%	0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

# Needham Public Schools Demographic Study –December 2019

## Newman Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	101	101	100	99	98	96	95	94	93	92	94	92	91	91	90	92
1	104	105	104	103	102	101	99	98	97	96	95	95	93	92	92	91
2	120	105	108	107	106	105	104	102	101	100	99	98	99	97	96	96
3	97	121	106	109	109	108	107	106	104	103	102	102	101	102	100	99
4	107	98	122	107	111	111	110	109	108	106	105	104	104	103	104	102
5	95	108	99	123	108	113	113	112	111	110	108	107	106	106	105	106
Total K-5	624	638	639	648	634	634	628	621	614	607	603	598	594	591	587	586
Total K-5	624	638	639	648	634	634	628	621	614	607	603	598	594	591	587	586
Change %		14	1	9	-14	0	-6	-7	-7	-7	-4	-5	-4	-3	-4	-1
Change		2.2%	0.2%	1.4%	-2.2%	0.0%	-0.9%	-1.1%	-1.1%	-1.1%	-0.7%	-0.8%	-0.7%	-0.5%	-0.7%	-0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## High Rock: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
6	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
Total 6	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
Total 6	499	430	477	454	470	477	463	467	464	458	458	453	456	455	455	452
Change %		-20	-22	24	-7	7	-14	4	-3	-6	0	-5	3	-1	0	-3
Change		-4.4%	-4.4%	5.6%	-1.5%	1.5%	-2.9%	0.9%	-0.6%	-1.3%	0.0%	-1.1%	0.7%	-0.2%	0.0%	-0.7%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

**Pollard Middle School: Total Enrollment**

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
7	460	504	434	482	459	468	475	461	465	462	456	456	455	461	457	457
8	432	451	494	425	472	454	463	470	456	460	460	454	454	453	459	455
<b>Total: 7-8</b>	<b>892</b>	<b>955</b>	<b>928</b>	<b>907</b>	<b>931</b>	<b>922</b>	<b>938</b>	<b>931</b>	<b>921</b>	<b>922</b>	<b>916</b>	<b>910</b>	<b>909</b>	<b>914</b>	<b>916</b>	<b>912</b>
<b>Total: 7-8</b>	<b>892</b>	955	928	907	931	922	938	931	921	922	916	910	909	914	916	912
<b>Change %</b>		63	36	-48	24	-9	16	-7	-10	1	-6	-6	-1	5	2	-4
<b>Change</b>		7.1%	-2.8%	-2.3%	2.6%	-1.0%	1.7%	-0.7%	-1.1%	0.1%	-0.7%	-0.7%	-0.1%	0.6%	0.2%	-0.4%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

**Needham High School: Total Enrollment**

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
9	380	436	456	499	429	479	461	470	477	461	465	465	461	461	460	466
10	453	376	432	451	494	425	474	456	465	472	456	463	463	459	459	458
11	421	448	372	428	446	489	421	469	451	460	467	454	461	461	457	457
12	401	417	444	368	424	442	484	417	464	446	455	462	449	456	456	452
<b>Total: 9-12</b>	<b>1655</b>	<b>1677</b>	<b>1704</b>	<b>1746</b>	<b>1793</b>	<b>1835</b>	<b>1840</b>	<b>1812</b>	<b>1857</b>	<b>1839</b>	<b>1843</b>	<b>1844</b>	<b>1834</b>	<b>1837</b>	<b>1832</b>	<b>1833</b>
<b>Total: 9-12</b>	<b>1655</b>	1677	1704	1746	1793	1835	1840	1812	1857	1839	1843	1844	1834	1837	1832	1833
<b>Change %</b>		22	27	42	47	42	5	-28	45	-18	4	1	-10	3	-5	1
<b>Change</b>		1.3%	1.6%	2.5%	2.7%	2.3%	0.3%	-1.5%	2.5%	-1.0%	0.2%	0.1%	-0.5%	0.2%	-0.3%	0.1%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## Low Scenario

### Needham Public Schools Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
PK	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72
K	390	410	408	404	402	398	395	390	387	382	383	378	376	373	371	380
1	436	420	423	421	417	414	409	406	401	398	392	390	385	383	380	378
2	441	448	433	435	433	428	425	419	417	412	410	406	405	400	398	395
3	434	448	455	439	442	441	436	434	430	428	423	422	420	419	413	411
4	463	440	454	460	444	447	446	439	439	434	434	432	432	430	429	423
5	422	468	445	459	465	451	454	451	444	445	440	443	443	443	441	440
Total: K-5	2586	2634	2618	2618	2603	2579	2565	2539	2518	2499	2482	2471	2461	2448	2432	2427
6	499	430	477	454	470	477	462	465	462	455	456	453	456	456	456	454
7	460	504	434	482	459	468	475	460	463	460	453	454	455	461	458	458
8	432	451	494	425	472	454	463	470	455	458	458	451	452	453	459	456
Total: 7-8	892	955	928	907	931	922	938	930	918	918	911	905	907	914	917	914
9	380	436	456	499	429	479	461	470	477	460	463	463	458	459	460	466
10	453	376	432	451	494	425	474	456	465	472	455	461	461	456	457	458
11	421	448	372	428	446	489	421	469	451	460	467	453	459	459	454	455
12	401	417	444	368	424	442	484	417	464	446	455	462	448	454	454	449
SP	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Total: 9-12	1658	1680	1707	1749	1796	1838	1843	1815	1860	1841	1843	1842	1829	1831	1828	1831
Total: K-12	5707	5771	5802	5800	5872	5888	5880	5821	5830	5785	5764	5743	5725	5721	5705	5698
Change		64	31	-2	72	16	-8	-59	9	-45	-21	-21	-18	-4	-16	-7
%Change		1.1%	0.5%	0.0%	1.2%	0.3%	-0.1%	-1.0%	0.2%	-0.8%	-0.4%	-0.4%	-0.3%	-0.1%	-0.3%	-0.1%
Total: K-5	2586	2634	2618	2618	2603	2579	2565	2539	2518	2499	2482	2471	2461	2448	2432	2427
Change		48	-16	0	-15	-24	-14	-26	-21	-19	-17	-11	-10	-13	-16	-5
%Change		1.9%	-0.6%	0.0%	-0.6%	-0.9%	-0.5%	-1.0%	-0.8%	-0.8%	-0.7%	-0.4%	-0.4%	-0.5%	-0.7%	-0.2%
Total: 6	499	430	477	454	470	477	462	465	462	455	456	453	456	456	456	454
Change		-69	47	-23	16	7	-15	3	-3	-7	1	-3	3	0	0	-2
%Change		-14%	10.9%	-4.8%	3.5%	1.5%	-3.1%	0.6%	-0.6%	-1.5%	0.2%	-0.7%	0.7%	0.0%	0.0%	-0.4%
Total: 7-8	892	955	928	907	931	922	938	930	918	918	911	905	907	914	917	914
Change		63	-27	-21	24	-9	16	-8	-12	0	-7	-6	2	7	3	-3
%Change		7.1%	-2.8%	-2.3%	2.6%	-1.0%	1.7%	-0.9%	-1.3%	0.0%	-0.8%	-0.7%	0.2%	0.8%	0.3%	-0.3%
Total: 9-12	1658	1680	1707	1749	1796	1838	1843	1815	1860	1841	1843	1842	1829	1831	1828	1831
Change		22	27	42	47	42	5	-28	45	-19	2	-1	-13	2	-3	3
%Change		1.3%	1.6%	2.5%	2.7%	2.3%	0.3%	-1.5%	2.5%	-1.0%	0.1%	-0.1%	-0.7%	0.1%	-0.2%	0.2%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.



# Needham Public Schools Demographic Study –December 2019

## Broadmeadow Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	77	86	86	85	84	84	83	82	81	80	79	79	78	78	77	78
1	102	86	89	89	88	87	87	86	85	84	82	81	81	80	80	79
2	84	105	89	92	92	91	90	90	89	88	87	84	84	84	83	83
3	95	86	107	91	95	95	94	94	94	93	92	90	88	88	87	86
4	97	96	87	108	92	96	96	93	93	93	92	93	91	89	89	88
5	93	98	97	88	109	93	97	95	92	92	92	93	94	92	90	90
Total K-5	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
Total K-5	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
Change %		9	-2	-2	7	-14	1	-7	-6	-4	-6	-4	-4	-5	-5	-2
Change		1.6%	-0.4%	-0.4%	1.3%	-2.5%	0.2%	-1.3%	-1.1%	-0.7%	-1.1%	-0.8%	-0.8%	-1.0%	-1.0%	-0.4%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## Eliot Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	64	70	70	69	69	69	69	68	67	66	65	64	64	63	63	65
1	67	71	72	72	71	71	70	70	69	68	67	66	65	65	64	64
2	75	70	74	74	73	72	72	71	72	71	70	70	69	68	68	67
3	61	77	72	75	75	74	73	73	73	74	73	72	72	71	70	70
4	73	63	79	73	76	76	75	74	75	74	75	74	74	74	73	72
5	72	74	64	80	74	77	77	76	75	77	75	77	76	76	76	75
Total K-5	412	425	431	443	438	439	436	432	431	430	425	423	420	417	414	413
Total K-5	412	425	431	443	438	439	436	432	431	430	425	423	420	417	414	413
Change %		13	6	12	-5	1	-3	-4	-1	-1	-5	-2	-3	-3	-3	-1
Change		3.2%	1.4%	2.8%	-1.1%	0.2%	-0.7%	-0.9%	-0.2%	-0.2%	-1.2%	-0.5%	-0.7%	-0.7%	-0.7%	-0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

# Needham Public Schools Demographic Study –December 2019

## Sunita Williams Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	83	83	82	82	82	81	80	79	79	78	78	77	77	76	76	77
1	80	87	86	85	85	84	83	82	81	81	80	80	79	79	78	78
2	92	83	90	89	88	88	87	85	84	83	84	83	83	82	82	81
3	93	93	84	91	90	90	90	89	87	86	85	86	86	86	85	85
4	92	94	94	85	92	91	91	91	90	88	89	88	89	89	89	88
5	78	93	95	95	86	94	93	93	93	92	90	91	92	93	93	93
Total K-5	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
Total K-5	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
Change %		15	-2	-4	-4	5	-4	-5	-5	-6	-2	-1	1	-1	-2	-1
Change		2.9%	-0.4%	-0.8%	-0.8%	1.0%	-0.8%	-1.0%	-1.0%	-1.2%	-0.4%	-0.2%	0.2%	-0.2%	-0.4%	-0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## Mitchell Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	65	70	70	69	69	68	68	67	67	66	67	66	66	65	65	68
1	83	71	72	72	71	71	70	70	69	69	68	68	67	67	66	66
2	70	85	72	73	74	73	73	72	72	71	71	71	71	70	70	69
3	88	71	86	73	74	75	74	74	73	73	72	73	73	73	72	72
4	94	89	72	87	74	75	76	75	75	74	74	73	74	74	74	73
5	84	95	90	73	88	75	76	77	76	76	75	75	74	75	75	75
Total K-5	484	481	462	447	450	437	437	435	432	429	427	426	425	424	422	423
Total K-5	484	481	462	447	450	437	437	435	432	429	427	426	425	424	422	423
Change %		-3	-19	-15	3	-13	0	-2	-3	-3	-2	-1	-1	-1	-2	1
Change		-0.6%	-4.0%	-3.2%	0.7%	-2.9%	0.0%	-0.5%	-0.7%	-0.7%	-0.5%	-0.2%	-0.2%	-0.2%	-0.5%	0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

# Needham Public Schools Demographic Study –December 2019

## Newman Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	101	101	100	99	98	96	95	94	93	92	94	92	91	91	90	92
1	104	105	104	103	102	101	99	98	97	96	95	95	93	92	92	91
2	120	105	108	107	106	104	103	101	100	99	98	98	98	96	95	95
3	97	121	106	109	108	107	105	104	103	102	101	101	101	101	99	98
4	107	98	122	107	110	109	108	106	106	105	104	104	104	104	104	102
5	95	108	99	123	108	112	111	110	108	108	108	107	107	107	107	107
Total K-5	624	638	639	648	632	629	621	613	607	602	600	597	594	591	587	585
Total K-5	624	638	639	648	632	629	621	613	607	602	600	597	594	591	587	585
Change %		14	1	9	-16	-3	-8	-8	-6	-5	-2	-3	-3	-3	-4	-2
Change		2.2%	0.2%	1.4%	-2.5%	-0.5%	-1.3%	-1.3%	-1.0%	-0.8%	-0.3%	-0.5%	-0.5%	-0.5%	-0.7%	-0.3%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## High Rock: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
6	499	430	477	454	470	477	462	465	462	455	456	453	456	456	456	454
Total 6	499	430	477	454	470	477	462	465	462	455	456	453	456	456	456	454
Total 6	499	430	477	454	470	477	462	465	462	455	456	453	456	456	456	454
Change %		-20	-22	24	-7	7	-15	3	-3	-7	1	-3	3	0	0	-2
Change		-4.4%	-4.4%	5.6%	-1.5%	1.5%	-3.1%	0.6%	-0.6%	-1.5%	0.2%	-0.7%	0.7%	0.0%	0.0%	-0.4%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

# Needham Public Schools Demographic Study –December 2019

## Pollard Middle School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
7	460	504	434	482	459	468	475	460	463	460	453	454	455	461	458	458
8	432	451	494	425	472	454	463	470	455	458	458	451	452	453	459	456
Total: 7-8	892	955	928	907	931	922	938	930	918	918	911	905	907	914	917	914
Total: 7-8	892	955	928	907	931	922	938	930	918	918	911	905	907	914	917	914
Change %		63	36	-48	24	-9	16	-8	-12	0	-7	-6	2	7	3	-3
Change		7.1%	-2.8%	-2.3%	2.6%	-1.0%	1.7%	-0.9%	-1.3%	0.0%	-0.8%	-0.7%	0.2%	0.8%	0.3%	-0.3%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## Needham High School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
9	380	436	456	499	429	479	461	470	477	460	463	463	458	459	460	466
10	453	376	432	451	494	425	474	456	465	472	455	461	461	456	457	458
11	421	448	372	428	446	489	421	469	451	460	467	453	459	459	454	455
12	401	417	444	368	424	442	484	417	464	446	455	462	448	454	454	449
Total: 9-12	1655	1677	1704	1746	1793	1835	1840	1812	1857	1838	1840	1839	1826	1828	1825	1828
Total: 9-12	1655	1677	1704	1746	1793	1835	1840	1812	1857	1838	1840	1839	1826	1828	1825	1828
Change %		22	27	42	47	42	5	-28	45	-19	2	-1	-13	2	-3	3
Change		1.3%	1.6%	2.5%	2.7%	2.3%	0.3%	-1.5%	2.5%	-1.0%	0.1%	-0.1%	-0.7%	0.1%	-0.2%	0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## High Scenario

### Needham Public Schools Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
PK	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72	72
K	390	410	408	404	402	398	398	399	397	392	393	388	385	382	379	385
1	436	420	423	421	417	414	409	409	408	406	400	398	393	390	387	384
2	441	448	433	435	433	429	426	422	422	421	420	414	413	407	404	401
3	434	448	455	439	443	442	438	438	434	434	433	433	428	427	419	416
4	463	440	454	460	445	449	448	444	443	440	442	443	441	436	435	427
5	422	468	445	459	465	452	456	454	450	450	447	451	452	450	445	444
Total: K-5	2586	2634	2618	2618	2605	2584	2575	2566	2554	2543	2535	2527	2512	2492	2469	2457
6	499	430	477	454	470	477	463	467	465	461	461	460	465	466	464	458
7	460	504	434	482	459	468	475	461	465	463	459	459	462	470	468	466
8	432	451	494	425	472	454	463	470	456	460	461	457	457	460	468	466
Total: 7-8	892	955	928	907	931	922	938	931	921	923	920	916	919	930	936	932
9	380	436	456	499	429	479	461	470	477	461	465	466	464	464	467	475
10	453	376	432	451	494	425	474	456	465	472	456	463	464	462	462	465
11	421	448	372	428	446	489	421	469	451	460	467	454	461	462	460	460
12	401	417	444	368	424	442	484	417	464	446	455	462	449	456	457	455
SP	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Total: 9-12	1658	1680	1707	1749	1796	1838	1843	1815	1860	1842	1846	1848	1841	1847	1849	1858
Total: K-12	5707	5771	5802	5800	5874	5893	5891	5851	5872	5841	5834	5823	5809	5807	5790	5777
Change		64	31	-2	74	19	-2	-40	21	-31	-7	-11	-14	-2	-17	-13
%Change		1.1%	0.5%	0.0%	1.3%	0.3%	0.0%	-0.7%	0.4%	-0.5%	-0.1%	-0.2%	-0.2%	0.0%	-0.3%	-0.2%
Total: K-5	2586	2634	2618	2618	2605	2584	2575	2566	2554	2543	2535	2527	2512	2492	2469	2457
Change		48	-16	0	-13	-21	-9	-9	-12	-11	-8	-8	-15	-20	-23	-12
%Change		1.9%	-0.6%	0.0%	-0.5%	-0.8%	-0.3%	-0.3%	-0.5%	-0.4%	-0.3%	-0.3%	-0.6%	-0.8%	-0.9%	-0.5%
Total: 6	499	430	477	454	470	477	463	467	465	461	461	460	465	466	464	458
Change		-69	47	-23	16	7	-14	4	-2	-4	0	-1	5	1	-2	-6
%Change		-14%	10.9%	-4.8%	3.5%	1.5%	-2.9%	0.9%	-0.4%	-0.9%	0.0%	-0.2%	1.1%	0.2%	-0.4%	-1.3%
Total: 7-8	892	955	928	907	931	922	938	931	921	923	920	916	919	930	936	932
Change		63	-27	-21	24	-9	16	-7	-10	2	-3	-4	3	11	6	-4
%Change		7.1%	-2.8%	-2.3%	2.6%	-1.0%	1.7%	-0.7%	-1.1%	0.2%	-0.3%	-0.4%	0.3%	1.2%	0.6%	-0.4%
Total: 9-12	1658	1680	1707	1749	1796	1838	1843	1815	1860	1842	1846	1848	1841	1847	1849	1858
Change		22	27	42	47	42	5	-28	45	-18	4	2	-7	6	2	9
%Change		1.3%	1.6%	2.5%	2.7%	2.3%	0.3%	-1.5%	2.5%	-1.0%	0.2%	0.1%	-0.4%	0.3%	0.1%	0.5%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

# Needham Public Schools Demographic Study –December 2019

## Broadmeadow Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	77	86	86	85	84	84	83	82	81	80	79	79	78	78	77	78
1	102	86	89	89	88	87	87	86	85	84	82	81	81	80	80	79
2	84	105	89	92	92	91	90	90	89	88	87	84	84	84	83	83
3	95	86	107	91	95	95	94	94	94	93	92	90	88	88	87	86
4	97	96	87	108	92	96	96	93	93	93	92	93	91	89	89	88
5	93	98	97	88	109	93	97	95	92	92	92	93	94	92	90	90
Total K-5	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
Total K-5	548	557	555	553	560	546	547	540	534	530	524	520	516	511	506	504
Change %		9	-2	-2	7	-14	1	-7	-6	-4	-6	-4	-4	-5	-5	-2
Change		1.6%	-0.4%	-0.4%	1.3%	-2.5%	0.2%	-1.3%	-1.1%	-0.7%	-1.1%	-0.8%	-0.8%	-1.0%	-1.0%	-0.4%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## Eliot Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	64	70	70	69	69	69	72	77	77	76	75	74	73	72	71	70
1	67	71	72	72	71	71	70	73	76	76	75	74	73	72	71	70
2	75	70	74	74	73	72	72	73	76	79	79	78	76	74	73	72
3	61	77	72	75	75	74	73	75	76	79	82	82	80	78	75	74
4	73	63	79	73	76	76	75	76	77	79	82	85	83	81	79	76
5	72	74	64	80	74	77	77	77	78	80	82	85	86	84	82	80
Total K-5	412	425	431	443	438	439	439	451	460	469	475	478	471	461	451	442
Total K-5	412	425	431	443	438	439	439	451	460	469	475	478	471	461	451	442
Change %		13	6	12	-5	1	0	12	9	9	6	3	-7	-10	-10	-9
Change		3.2%	1.4%	2.8%	-1.1%	0.2%	0.0%	2.7%	2.0%	2.0%	1.3%	0.6%	-1.5%	-2.1%	-2.2%	-2.0%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

**Sunita Williams Elementary: Total Enrollment**

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	83	83	82	82	82	81	80	79	79	78	78	77	77	76	76	77
1	80	87	86	85	85	84	83	82	81	81	80	80	79	79	78	78
2	92	83	90	89	88	88	87	85	84	83	84	83	83	82	82	81
3	93	93	84	91	90	90	90	89	87	86	85	86	86	86	85	85
4	92	94	94	85	92	91	91	91	90	88	89	88	89	89	89	88
5	78	93	95	95	86	94	93	93	93	92	90	91	92	93	93	93
Total K-5	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
Total K-5	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
Change %		15	-2	-4	-4	5	-4	-5	-5	-6	-2	-1	1	-1	-2	-1
Change		2.9%	-0.4%	-0.8%	-0.8%	1.0%	-0.8%	-1.0%	-1.0%	-1.2%	-0.4%	-0.2%	0.2%	-0.2%	-0.4%	-0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

**Mitchell Elementary: Total Enrollment**

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	83	83	82	82	82	81	80	79	79	78	78	77	77	76	76	77
1	80	87	86	85	85	84	83	82	81	81	80	80	79	79	78	78
2	92	83	90	89	88	88	87	85	84	83	84	83	83	82	82	81
3	93	93	84	91	90	90	90	89	87	86	85	86	86	86	85	85
4	92	94	94	85	92	91	91	91	90	88	89	88	89	89	89	88
5	78	93	95	95	86	94	93	93	93	92	90	91	92	93	93	93
Total K-5	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
Total K-5	518	533	531	527	523	528	524	519	514	508	506	505	506	505	503	502
Change %		15	-2	-4	-4	5	-4	-5	-5	-6	-2	-1	1	-1	-2	-1
Change		2.9%	-0.4%	-0.8%	-0.8%	1.0%	-0.8%	-1.0%	-1.0%	-1.2%	-0.4%	-0.2%	0.2%	-0.2%	-0.4%	-0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

### Newman Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
K	101	101	100	99	98	96	95	94	93	92	94	92	91	91	90	92
1	104	105	104	103	102	101	99	98	97	96	95	95	93	92	92	91
2	120	105	108	107	106	105	104	102	101	100	99	98	99	97	96	96
3	97	121	106	109	109	108	107	106	104	103	102	102	101	102	100	99
4	107	98	122	107	111	111	110	109	108	106	105	104	104	103	104	102
5	95	108	99	123	108	113	113	112	111	110	108	107	106	106	105	106
Total K-5	624	638	639	648	634	634	628	621	614	607	603	598	594	591	587	586
Total K-5	624	638	639	648	634	634	628	621	614	607	603	598	594	591	587	586
Change %		14	1	9	-14	0	-6	-7	-7	-7	-4	-5	-4	-3	-4	-1
Change		2.2%	0.2%	1.4%	-2.2%	0.0%	-0.9%	-1.1%	-1.1%	-1.1%	-0.7%	-0.8%	-0.7%	-0.5%	-0.7%	-0.2%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

### High Rock: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26-	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
6	499	430	477	454	470	477	463	467	465	461	461	460	465	466	464	458
Total 6	499	430	477	454	470	477	463	467	465	461	461	460	465	466	464	458
Total 6	499	430	477	454	470	477	463	467	465	461	461	460	465	466	464	458
Change %		-20	-22	24	-7	7	-14	4	-2	-4	0	-1	5	1	-2	-6
Change		-4.4%	-4.4%	5.6%	-1.5%	1.5%	-2.9%	0.9%	-0.4%	-0.9%	0.0%	-0.2%	1.1%	0.2%	-0.4%	-1.3%

Red numbers are current enrollment; Orange cells are forecasted enrollment.



# Needham Public Schools Demographic Study –December 2019

## Pollard Middle School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
7	460	504	434	482	459	468	475	461	465	463	459	459	462	470	468	466
8	432	451	494	425	472	454	463	470	456	460	461	457	457	460	468	466
Total: 7-8	892	955	928	907	931	922	938	931	921	923	920	916	919	930	936	932
Total: 7-8	892	955	928	907	931	922	938	931	921	923	920	916	919	930	936	932
Change %		63	36	-48	24	-9	16	-7	-10	2	-3	-4	3	11	6	-4
Change		7.1%	-2.8%	-2.3%	2.6%	-1.0%	1.7%	-0.7%	-1.1%	0.2%	-0.3%	-0.4%	0.3%	1.2%	0.6%	-0.4%

Red numbers are current enrollment; Orange cells are forecasted enrollment.

## Needham High School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
9	380	436	456	499	429	479	461	470	477	461	465	466	464	464	467	475
10	453	376	432	451	494	425	474	456	465	472	456	463	464	462	462	465
11	421	448	372	428	446	489	421	469	451	460	467	454	461	462	460	460
12	401	417	444	368	424	442	484	417	464	446	455	462	449	456	457	455
Total: 9-12	1655	1677	1704	1746	1793	1835	1840	1812	1857	1839	1843	1845	1838	1844	1846	1855
Total: 9-12	1655	1677	1704	1746	1793	1835	1840	1812	1857	1839	1843	1845	1838	1844	1846	1855
Change %		22	27	42	47	42	5	-28	45	-18	4	2	-7	6	2	9
Change		1.3%	1.6%	2.5%	2.7%	2.3%	0.3%	-1.5%	2.5%	-1.0%	0.2%	0.1%	-0.4%	0.3%	0.1%	0.5%

Red numbers are current enrollment; Orange cells are forecasted enrollment.



## Needham School Committee

January 7, 2020

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Agenda Item:     **Discussion**

### **FY21 Budget Discussion**

Background Information:

- This will be the third of several discussions about the FY21 budget.
- The School Committee will be asked to vote on the FY21 budget request at its meeting on January 28<sup>th</sup>.

Persons Available for Presentation:

Dr. Dan Gutekanst, Superintendent of Schools

Dr. Alexandra Montes McNeil, Assistant Superintendent for Human Resources

Dr. Terry Duggan, Assistant Superintendent for Student Learning

Ms. Anne Gulati, Assistant Superintendent for Finance and Operations

Ms. Mary Lammi, Assistant Superintendent for Student Support Services



# Needham Public Schools

## Superintendent's FY21 Operating Budget Request

Needham School Committee  
January 7, 2020



*Portrait of a Needham Graduate*

# Portrait of a Needham Graduate

## Strategic Priorities 2020-2025

**PRIORITY #1**  
**ALL STUDENTS**  
**ARE DRIVERS**  
**OF THEIR OWN**  
**LEARNING**

**PRIORITY #3**  
**ALL STUDENTS**  
**LEARN & GROW**  
**WITHIN**  
**ADAPTABLE**  
**ENVIRONMENTS**



**PRIORITY #2**  
**ALL STUDENTS**  
**EXPERIENCE**  
**INTEGRATIVE**  
**TEACHING AND**  
**LEARNING**

**PRIORITY #4**  
**INFRASTRUCTURE**  
**SUPPORTS**  
**NEEDS OF**  
**ALL STUDENTS**

# **FY21 Proposed Increases: Middle School & High School Staff**

- Grades 7-8 Classroom Teachers **2.4 FTE**
- Grades 9-12 Classroom Teachers **1.5 FTE**

**Total FY21 FTE Request: 3.9 FTE**

# **FY21 Proposed Increases: Middle School & High School Staff**

- **Grades 7-8 Classroom Teachers**
  - 2.4 FTE Core and Elective Teachers to address enrollment growth of 60+ students
- **Grades 9-12 Classroom Teachers**
  - 1.5 FTE math, English, social studies teachers for enrollment growth & interdisciplinary teaching

# FY21 Proposed Increases:

## Assistant Principals

- **Assistant Principals provide vital administrative and leadership capacity at the building level:**
  - They help the principal and staff build a strong, positive, and inclusive school culture
  - They assist all students to grow, accept responsibility, and build relationships
  - They provide support, guidance, and direction to families and caregivers
  - They work closely with staff, including nurse, guidance, School Resource Officer, & others to meet student and school needs & ensure school and student safety/wellbeing
  - They supervise teachers and TAs and provide support, ideas, and suggestions for growth and improvement
  - **Needham's Assistant Principals act as “co-pilots” with their principal in leading each school**

# FY21 Proposed Increases: Assistant Principals

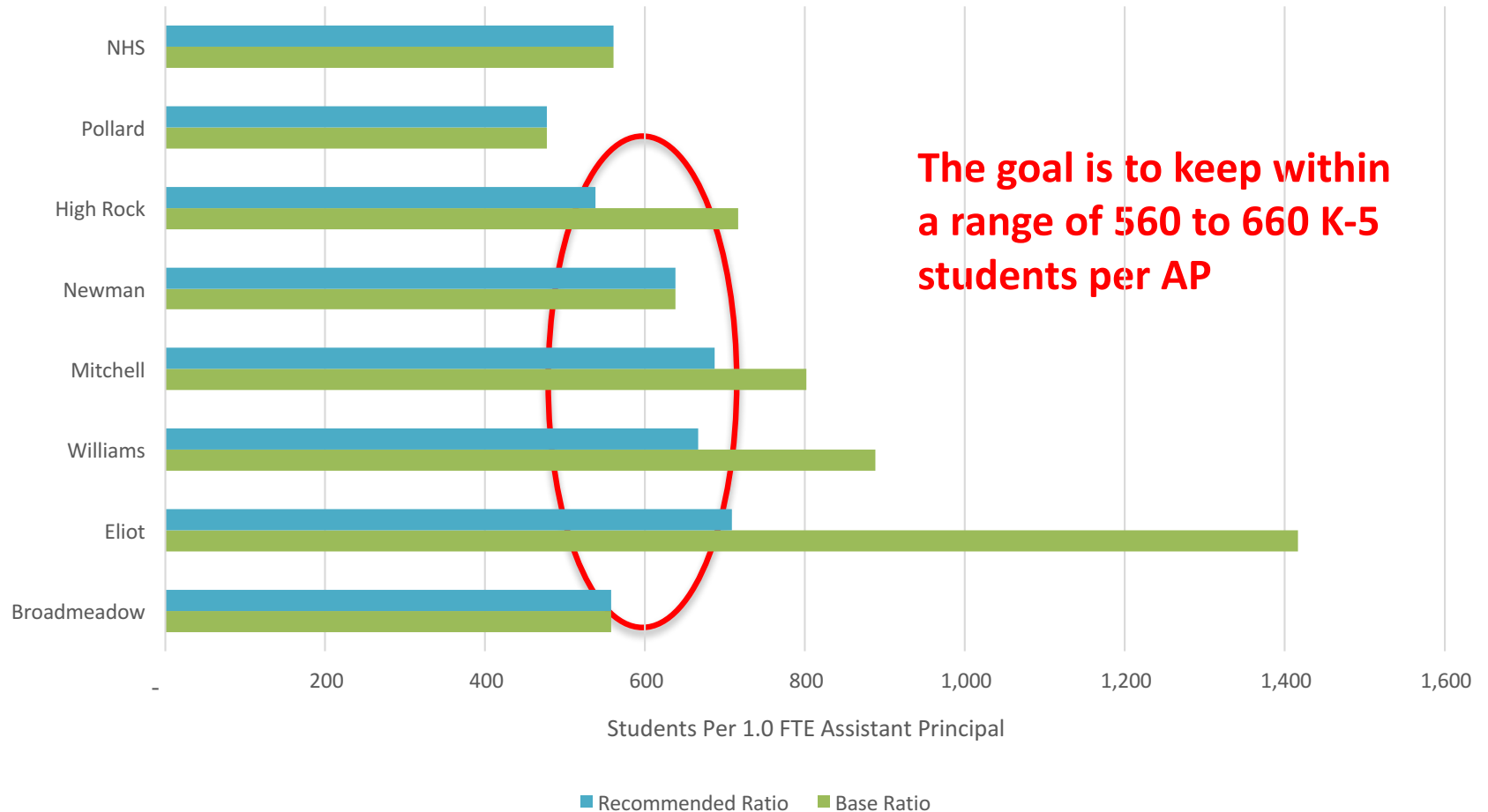
0.8 FTE Assistant Principal Positions to improve student  
& school support and ensure equity among schools

School	FY21 Students	FY21 Base FTE	FY21 Base Ratio Student: AP	FY21 FTE Recomm	FY21 Recom Ratio Student: AP
Broadmeadow	557	1.00	557	1.00	557
Eliot	425	0.30	1,417	0.60	708
Williams	533	0.60	888	0.80	666
Mitchell	481	0.60	802	0.70	687
Newman	638	1.00	638	1.00	638
High Rock	430	0.60	717	0.80	538
Pollard	955	2.00	478	2.00	478
NHS	1680	3.00	560	3.00	560



# FY21 Proposed Increases: Assistant Principals

FY21 School Operating Budget  
Assistant Principal Recommended Staffing Ratio Students: AP





## Needham School Committee

January 7, 2020

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Agenda Item:     **Action**

Establish Needham High School Dave DiCicco Golden Heart Scholarship

Action recommended:

Upon recommendation of the Superintendent, that the Needham School Committee establishes the Needham High School Dave DiCicco Golden Heart Scholarship as submitted.

## NEEDHAM SCHOOL COMMITTEE

Agenda Item#: \_\_\_\_\_

Date: January 7, 2020

**Item Title:** Establish Dave DiCicco Golden Heart Scholarship at High School

**Item Description:** The request is to establish the Dave DiCicco Golden Heart Scholarship at Needham High School. Dave DiCicco is a Needham resident that has been involved in Needham youth sports, and has served on the Board of Park and Recreation.

The Needham Police Union would like to establish this scholarship to provide financial assistance to a Needham High School graduate pursuing a post-secondary education. The scholarship would recognize a student with outstanding service to the school, community, or an organization within the community. The applicant must be nominated by a faculty member at the Needham High School. The scholarship would consist of an annual award, disbursed by the Needham Police Union, in the amount of \$1,000 per year. The first award would be made in June of 2020.

**Issues:** M.G.L. Chapter 44, Section 53A and School Committee policy #DFC authorize the School Committee to accept any grant of gifts or funds given for educational purposes by the federal or state government, charitable foundations, private corporations, PTCs or an individual. M.G.L. Chapter 44, Section 53A further stipulates that any monies received and accepted by the School Committee may be expended without further appropriation.

**Recommendations/Options:** That the School Committee vote to establish the Dave DiCicco Golden Heart Scholarship at Needham High School, as proposed.

**School Committee:** Action Item

**Attachments:** Scholarship Recommendation

Respectfully Submitted,

*Anne Gulati*

Assistant Superintendent for Finance and Operations

# Scholarship/ Award Recommendation Form

**Name** Dave DiCicco Golden Heart Scholarship

**Origin/  
Purpose** This scholarship was created to recognize any students outstanding service to the school, community, or an organization within the community. This award honors a student who has continuously demonstrated a passion to help others, has shown a steadfast dedication to a cause, and has an un-tempered enthusiasm to make a difference. This award is open to all students who feel that altruism, compassion, generosity, and kindness are the guiding principals that motivate them.

**Award  
Criteria** The only criteria is outstanding service to others. There is no academic requirement for this award. All applicants must first be nominated by a faculty member at the High School. After nomination, each applicant should write and present a short synopsis of why they believe they deserve this award to the Police Union along with a letter of support from the nominating teacher. The Police Union will choose a finalist to receive the award.

## Financial Management:

**Funds Held/ Disbursed By** Family / Group

**Principal Balance  
Initial Gift (if Funds  
Held by Town of  
Needham):**

## Disbursement Conditions:

Funds will be distributed to the student by the Treasurer of the Police Union.

## Financial Awards:

**# Awards Per Year** One

**Amount Per Award** \$1000

**Award  
Amount Note**

**Last Update** 12/18/2019



# NEEDHAM HIGH SCHOOL

A CARING COMMUNITY  
STRIVING FOR PERSONAL GROWTH AND  
ACADEMIC EXCELLENCE

*Aaron Sicotte*  
*Principal*

To: Needham School Committee  
From: Aaron Sicotte, Principal  
Re: Scholarship Endorsement: Dave DiCicco Golden Heart Scholarship  
Date: December 18, 2019

After reviewing the proposed Dave DiCicco Golden Heart Scholarship, I heartily endorse its creation. This scholarship provides a wonderful opportunity for recognizing Needham High School students' civic involvement and service.

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Aaron Sicotte  
Principal



## Needham School Committee

January 7, 2020

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Agenda Item:     **Action**

Establish Needham High School Zack Kalish Memorial Scholarship

Action recommended:

Upon recommendation of the Superintendent, that the Needham School Committee establishes the Needham High School Zack Kalish Memorial Scholarship as submitted.

## NEEDHAM SCHOOL COMMITTEE

**Agenda Item#:** \_\_\_\_\_ **Date:** January 7, 2020

**Item Title:** Establish Zack Kalish Memorial Scholarship at High School

**Item Description:** The request is to establish a scholarship in memory of Zack Kalish at Needham High School. Zack Kalish was born and raised in Needham, he graduated in 2006 and attended the University of Delaware. He was active in the Needham community, played in a variety of sports and developed friendships with people of all ages which he maintained throughout his short life.

Zack's family would like to establish this scholarship to provide financial assistance to a Needham High School graduate pursuing a post-secondary education. The scholarship would recognize a student who shows loyalty, compassion and values friendships in all interpersonal relationships. The scholarship would consist of an annual award, disbursed by the family, in the amount of \$1,500 per year. The first award would be made in June of 2020.

**Issues:** M.G.L. Chapter 44, Section 53A and School Committee policy #DFC authorize the School Committee to accept any grant of gifts or funds given for educational purposes by the federal or state government, charitable foundations, private corporations, PTCs or an individual. M.G.L. Chapter 44, Section 53A further stipulates that any monies received and accepted by the School Committee may be expended without further appropriation.

**Recommendations/Options:** That the School Committee vote to establish the Zack Kalish Memorial Scholarship at Needham High School, as proposed.

**School Committee:** Action Item

**Attachments:** Scholarship Recommendation

Respectfully Submitted,

*Anne Gulati*

Assistant Superintendent for Finance and Operations



# NEEDHAM HIGH SCHOOL

A CARING COMMUNITY  
STRIVING FOR PERSONAL GROWTH AND  
ACADEMIC EXCELLENCE

*Aaron Sicotte*  
*Principal*

To: Needham School Committee  
From: Aaron Sicotte, Principal  
Re: Scholarship Endorsement: Zack Kalish Memorial Scholarship  
Date: December 27, 2019

After reviewing the proposed Zack Kalish Memorial Scholarship, I heartily endorse its creation. This scholarship provides a wonderful opportunity for recognizing Needham High School students who demonstrate loyalty, compassion, and friendship in all interpersonal relationships.

Aaron Sicotte  
Principal



# Scholarship/ Award Recommendation Form

Name Zack Kalish Memorial Scholarship

**Origin/  
Purpose**

This scholarship is being established in memory of Zack Kalish. Zack was born in and lived in Needham until he graduated in 2006. Upon graduation he went to the University of Delaware and lived in New York after graduating from college. He was active in the community and played a variety of sports. He developed friendships with people of all ages which he maintained throughout his short life. He fiercely believed in honesty and loyalty and was always the first one to reach out, whether it was a celebration or a sad event. He worked hard at these relationships and received a lot in return. His humor and compassion will never be forgotten.

**Award  
Criteria**

A student who shows loyalty, compassion and values friendship in all interpersonal relationships.

**Financial Management:**

Funds Held/ Disbursed By Family / Group

**Principal Balance  
Initial Gift (if Funds  
Held by Town of  
Needham):**

**Disbursement Conditions:**

**Financial Awards:**

# Awards Per Year One

Amount Per Award \$1500

**Award  
Amount Note**

**Last Update**

12/30/2019



## Needham School Committee

January 7, 2020

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### Agenda Item:     **School Committee Comments**

#### Background Information:

- Members of the School Committee will have an opportunity to report on events, information, and matters of interest not on the agenda.

#### Members of the School Committee available for comment:

Michael Greis, Chair

Andrea Longo Carter, Vice-Chair

Connie Barr

Heidi Black

Susan Neckes

Aaron Pressman

Matthew Spengler

Aidan Michelow, Student Representative member of School Committee



## Needham School Committee

January 7, 2020

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Agenda Item:     **Information Items**

- Needham Community Education FY21 Revolving Fund Budget Request
- Needham Preschool FY21 Revolving Fund Budget Request
- ACCEPT Collaborative 2018-2019 Annual Report- Additional information on ACCEPT may be obtained from the Superintendent's office.

## NCE FY21 Budget Overview

<b>Program Name:</b>	<b>Needham Community Education (NCE)</b>
<b>Program Manager:</b>	<b>Director of Strategic Planning and Community Engagement</b>
<b>Executive Summary:</b>	<b>For FY21, the NCE revolving fund's budget supports seven fee-based programs. The total FY21 budgeted revenue is \$1,237,270 accounting for 5,946 registrations in 568 different courses that address the diverse needs and interests of Needham's elementary, middle school and high school students, as well as adults living and working in Needham. This includes NCE's Early Childcare program which continues into its second year supporting Needham Public Schools' staff.</b>

Needham Community Education (NCE) seeks to develop programs that are high quality, customer-driven, efficiently managed, financially solid, complementary to the district's core mission, and in service to the community. NCE staff continue to ask and pursue answers to these strategic questions: Is there an unmet community need for us to focus on? Have we thoroughly identified the community's interests, introduced them to novel programs, and found innovative ways to deliver programs? Is the department as productive as possible, increasing our capacity for growth?

For FY21 as in FY20, the NCE revolving fund's budget supports seven fee-based programs. The total FY21 budgeted revenue is \$1,237,270 accounting for 5,946 registrations in 568 different courses that address the diverse needs and interests of Needham's elementary, middle school and high school students, as well as adults living and working in the Needham community. This includes NCE's Early Childcare program which continues into its second year supporting Needham Public Schools' staff.

For FY21, the seven fee-based Needham Community Education programs include:

- NCE Early Childcare Program
- NCE Elementary
- NCE Middle School
- NCE Summer Programs
- NCE Adult
- Tutoring
- Summer Sports Clinics

The proposed budgets for all seven NCE programs are attached.

## **Revolving Fund FY21 Budget Request**

<b>Fund Name:</b>	<b>NCE Elementary (formerly known as Elementary After School Enrichment or E.A.S.E.) (2350-3702)</b>
<b>Fund Manager:</b>	<b>Elementary Program Coordinator/Needham Community Education</b>
<b>Executive Summary:</b>	<b>No change in program and minimal increase in fee structure, with a \$5 average increase per course; fees range from \$80-\$215 across 100 course offerings accommodating up to 1,166 student registrants at the 5 elementary schools.</b>

### **Fund Description:**

NCE Elementary is a fee-based after school program, which gives elementary students the opportunity to engage in enrichment clubs and classes each year. Typically, clubs/classes meet once a week for an hour over an eight-week term at the five elementary schools. Three terms are being offered: fall, winter, and spring. For FY20, 1042 registrations are projected in 87 course offerings.

### **Critical Issues:**

The number of registrants and courses in FY19 and FY20 are lower than previous years due to a hiatus in program offerings at Hillside/Williams School during the move and opening of the new school. Space and teacher availability were limited or non-existent during the Hillside/Williams transition. In FY21, we will re-establish the program at full capacity in terms of the number of registrants we accommodate in the five schools.

A growing number of NCE Elementary classes require support for classroom management and this necessitates a significant amount of outreach and coordination with parents and the hiring of needed teaching assistants, especially when courses are provided by outside vendors and not Needham Public School teachers. Outside vendors do not know our students, their needs, or the strategies established by these students' teachers and families to support them. This is an important issue to address and a priority as we fulfill requests from families, School Guidance Counselors, and Special Education Liaisons for accommodations that support over 60 student registrants in NCE Elementary classes on average each year.

The continuing challenge with NCE Elementary is to provide high-quality classes that both complement the curriculum and are fun and engaging for students, while at the same time maintaining reasonable class fees. NCE is committed to providing scholarships for those families who cannot afford the programs. With support from school-based personnel, we reach out to families whose children may benefit from no-cost or low-cost classes in order to make NCE after school activities accessible to all students.

### **Enabling Legislation**

M.G.L. Chapter 71, Section 47.

## Staffing:

The following positions are funded in the FY21 Budget: Elementary Program Coordinator (0.24 FTE) and a portion of the Department Director (0.08 FTE), as well as part-time program instructors and teaching assistants, temporary on-site coordinators, and portions of the salaries of the Community Ed Registrar/ Marketing Manager (0.10 FTE) and the Bookkeeper (0.07 FTE). A staffing chart for the program is presented below:

<b>FTE</b>	<b>FY19 Actual</b>	<b>FY20 Budget</b>	<b>FY20 Proj</b>	<b>FY21 Budget</b>	<b>Inc/(Dec)</b>
Admin	0.29	0.32	0.32	0.32	-
Clerical	0.16	0.17	0.17	0.17	-
<b>Total</b>	<b>0.45</b>	<b>0.49</b>	<b>0.49</b>	<b>0.49</b>	<b>-</b>

There are no staffing changes for the FY21 Budget.

## Description of Revenues:

The FY21 budgeted revenue of \$179,295 assumes registration from 1,166 students in 100 course offerings at the five elementary schools. These registration rates are based on historical experience and re-establish the number of offerings traditionally provided to Hillside/Williams families. Program fees range from \$80 to \$215 and each term runs uniformly for 8 weeks. This is a streamlined approach to delivering the program and generates a breakeven budget.

## Expenses

The FY21 NCE Elementary revolving fund expenses are budgeted to be \$184,192 and include salaries, class supplies/materials, contractual services with outside vendors, office supplies, and printing.

## Fund Balance:

Our projected ending fund balance is \$62,742. To promote solid business practices, our goal is to hold three months of operating expenses in carry-over reserves, which equals \$55,257. Of the total ending fund balance, \$12,258 is held as reserve contingency teaching assistants and \$50,484 is undesignated.

## FY21 Proposed Budget:

The proposed budget for the fee-based Elementary program is attached.

## Revolving Fund FY21 Budget Request

<b>Fund Name:</b>	<b>NCE Middle School, formerly Pollard After School (PAS) and Rock After School (RAS) (2350-3703)</b>
<b>Fund Manager:</b>	<b>Middle School Program Coordinator/Needham Community Education</b>
<b>Executive Summary:</b>	<b>Based on feedback from Middle School students, parents and staff, the NCE Middle School Program is shifting focus to the after-school enrichment classes and programs that appeal to a wide range of students, with 53 planned offerings for 653 registrants. The program fees for these programs remain the same, ranging from \$39-\$280.</b>

### Fund Description:

Needham Community Education Middle School includes fee-based after school enrichment for High Rock and Pollard students. The NCE offerings complement the Athletic Department's sports teams, school clubs, and music lessons/theater with a wide variety of programs that meet the interests of middle school students. These include after school enrichments, as well as transition support for students entering Middle School with a program known as *Insiders Guide to High Rock*. In FY20, 2,308 registrations are projected for NCE's Middle School programs.

### Critical Issues:

Based on feedback from students, parents and staff, the NCE Middle School Program for FY21 is focusing on the enrichment classes that appeal to a wide range of students. Our data gathering shows a pattern of dwindling interest in the daily ASAP Program (After School at Pollard) that runs until 6:00 pm. Students are opting instead to go home after school or to register for an NCE 6- to 8-week hour long afterschool class. In this fourth year of ASAP, only a small number of students are regularly attending (as low as 3 students on some days and averaging about 10.5 students per day). Therefore, ASAP accounts for a significant number of one-day registrations for a limited number of students, so this registration number is not a good indicator of Middle School student engagement. NCE is reaching more students by increasing the number of 6- to 8-week classes offered both at High Rock and Pollard in FY21, and we are providing a more fiscally sound Middle School enrichment program.

Another trend is that NCE Middle School classes require more support for classroom management, especially when courses are provided by outside vendors and not Needham Public School teachers. Outside vendors do not know our students, their needs, or the strategies established by these students' teachers and families to support them. This is an important issue to address and a priority as we fulfill requests from families, School Guidance Counselors, and Special Education Liaisons for accommodations that support all student registrants in NCE Middle School classes.

We are committed to making the Middle School programs accessible to all families and that also includes providing scholarships each term.

## Enabling Legislation:

M.G.L. Chapter 71, Section 47.

## Staffing:

The following positions are funded in the FY21 Budget: Middle School Program Coordinator (0.40 FTE) and a portion of the Department Director (0.04 FTE). The clerical staff includes the Registrar/Marketing Manager at 0.05 FTE and the Bookkeeper at 0.04 FTE. Other staff members include part-time instructors and temporary onsite coordinators, who receive stipends. A staffing chart for the program is below:

<b>FTE</b>	<b>FY19 Actual</b>	<b>FY20 Budget</b>	<b>FY20 Proj</b>	<b>FY21 Budget</b>	<b>Inc/(Dec)</b>
Admin	0.43	0.44	0.44	0.44	-
Clerical	0.08	0.09	0.09	0.09	-
<b>Total</b>	<b>0.51</b>	<b>0.53</b>	<b>0.53</b>	<b>0.53</b>	<b>-</b>

There are no staffing changes for the FY21 Budget.

## Description of Revenues:

In FY21, 653 Middle School program registrations are budgeted across 53 planned course offerings for students in Grades 6 to 8. These diverse offerings, to be held both at High Rock and at Pollard, will generate budgeted revenue of \$92,007. FY21 revenue takes into consideration our experience in FY20. Fees for the traditional 6- to 8-week courses range from \$39 to \$280.

## Expenses:

In addition to staffing, FY21 NCE Middle School revolving fund expenses include contractual services (outside vendors), program supplies, office supplies, and printing. Total program expenses for FY21 are budgeted to be \$90,059.

## Fund Balance:

To promote solid business practices, our goal is to hold three months operating expenses in carry-over reserves. This would total \$27,018. Our anticipated ending fund balance is \$10,575, which represents 39% of our goal.

## FY21 Proposed Budget:

The proposed budget for the fee-based NCE Middle School Program is attached.



## Revolving Fund FY21 Budget Request

<b>Fund Name:</b>	<b>NCE Summer Program, formerly Summer School (2350-3704)</b>
<b>Fund Manager:</b>	<b>Summer Program Coordinator/ Needham Community Education</b>
<b>Executive Summary:</b>	<b>The NCE Summer Program is strong despite space constraints at the schools, with enrollment close to capacity. For FY21, the budget is to accommodate 1,397 registrants in 133 planned programs. Fees range from \$164 to \$449 for enrichments and \$665 for the 4-week remedial classes.</b>

### Fund Description:

The NCE Summer Program operates during the month of July and provides high-quality enrichment courses for students entering Grades 1-9, as well as remedial literacy classes for elementary students entering Grades 1-5. In FY20, 1,386 registrants participated in 130 enrichment and remedial classes.

### Critical Issues:

The enrollment in our summer program is close to capacity due to space constraints. Given the other building needs in summer (construction, repairs, cleaning, professional development, special education, METCO, Parks & Rec), NCE Summer programs can be offered only during the month of July and only in a limited number of schools. Our full-day summer programming provides an attractive option for families; however, it requires a significant investment in infrastructure for on-site coordination and supervision of students during the mid-day.

NCE Summer works closely with the Special Education Department to partner on inclusive programming for students whose IEPs require summer programming. Slots are reserved in specific classes that are a good fit for specific students' needs. The two departments work collaboratively to provide adaptive programming and aides in the inclusive setting. That partnership will continue in FY21, resulting in cost savings in Special Education and better educational options for students.

For the remedial literacy program, NCE supports the District's Title I Coordinator in offering a targeted program for students entering Grades 1 through 5. NCE's responsibility includes the marketing, online and in-person registration, and providing scholarships for families in need.

### Enabling Legislation

M.G.L. Chapter 71, Section 71E.

### Staffing:

FY21 staffing includes a (0.58 FTE) Program Administrator and a portion of the Department Director (0.33 FTE), as well as part-time instructors via stipends, temporary onsite coordinators, classroom

aides, and an onsite Nurse. Clerical support includes a portion of the salaries of the Community Education Registrar/Marketing Manager (0.25 FTE), and Bookkeeper (0.11 FTE).

A staffing chart for the program is presented below.

<b>FTE</b>	<b>FY19 Actual</b>	<b>FY20 Budget</b>	<b>FY20 Proj</b>	<b>FY21 Budget</b>	<b>Inc/(Dec)</b>
Admin	0.88	0.91	0.91	0.91	-
Clerical	0.36	0.36	0.36	0.36	-
<b>Total</b>	<b>1.24</b>	<b>1.27</b>	<b>1.27</b>	<b>1.27</b>	<b>-</b>

There are no staffing changes for the FY21 Budget.

### **Description of Revenues:**

FY21 revenue from NCE Summer is budgeted at \$326,503. Fees range from \$164 to \$449 for enrichment classes, and \$665 for the 4-week remedial reading class. The fees are adjusted in the FY21 budget to cover increases in overhead, including salaries.

### **Expenses:**

FY21 revolving fund expenses for NCE Summer of \$331,945 include salaries, custodial services (beyond regular hours), nurse, school aides, instructional technology, classroom supplies and office supplies.

### **Fund Balance:**

To maintain solid business practice, we set a goal of carrying 3 months of operating expenses (or \$99,584). Budgeted ending fund balance for FY21 is projected to be \$104,533, which is slightly more than the target amount.

### **FY21 Proposed Budget:**

The proposed budget for the fee-based Summer School program is attached.

## Revolving Fund FY21 Budget Request

<b>Fund Name:</b>	<b>Tutoring (2350-3706)</b>
<b>Fund Manager:</b>	<b>Director of Strategic Planning and Community Engagement</b>
<b>Executive Summary:</b>	<b>No program or fee changes are planned for FY21</b>

### Fund Description:

The Fund was established to keep track of tutoring in school buildings and to establish a department to monitor the practice.

The tutoring rate is currently set at \$50/hour. Payment for tutoring sessions is made from the parent to the teacher. The tutor registration form requires the tutor to specify the student, subject being tutored, location of the tutoring, scheduled dates/times. In addition, the form requires the signatures of the student's counselor, teacher and principal. The completed form is then sent to Needham Community Education with the \$10 registration fee, which covers the cost of administering the registry and policies.

### Critical Issues:

The private tutoring guidelines were established to inform staff and parents of acceptable practices for tutoring for pay within school facilities. Tutoring for pay on school property is allowed if:

- The tutor is an employee of the Needham Public Schools.
- The tutor pays an annual registration fee set by the school system.
- The tutor registers with the Director of Strategic Planning and community Engagement.
- The tutor accepts the established rates set by the school system.
- The tutor begins sessions for pay no earlier than one hour after school is dismissed.
- The tutor concludes morning sessions for pay no later than one hour before school begins.
- The tutor informs the student's counselor and student's teacher of the tutoring arrangement.
- The tutor has received the approval of the building principal where the tutoring takes place.

### Enabling Legislation

M.G.L. Chapter 71, Section 47.

### Staffing/Expenses:

The fees are used to offset the costs of the staff to administer the program. There are no permanent staff assigned to this program. FY21 expenses are \$20.

### Description of Revenues:

Revenues are generally in the \$20-\$100 range with 2-10 tutors registering their tutoring arrangements. The proposed budget for Tutoring is \$20.

### Fund Balance:

FY21 ending Fund Balance is \$0.

### FY21 Proposed Budget:

The FY21 proposed budget for the Tutoring Program is attached.

## Revolving Fund FY21 Budget Request

<b>Fund Name:</b>	<b>Summer Sports Clinics (2350-3707)</b>
<b>Fund Manager:</b>	<b>NCE Adult-High School Coordinator / High School Athletics</b>
<b>Executive Summary:</b>	<b>No change in program structure. Fees of \$75-\$199 for nine clinics, including Volleyball, Girls Basketball, Field Hockey, Baseball, and Wrestling Clinics that accommodate 157 students.</b>

### Fund Description:

The NHS Athletic Department and Needham Community Education are collaborating to offer intensive clinics for sports that have interscholastic offerings at the High School but limited opportunities to develop younger players in town. In FY20, the program included Volleyball, Girls Basketball, Field Hockey, Baseball and Wrestling Clinics for 162 students.

### Critical Issues:

Prior to the establishment of the collaboration between NCE and the NHS Athletics Department, there was no structure in place to facilitate the creation of clinics to introduce younger students to the variety of athletic options available at the High School. The Athletic Director identified the need to cultivate future players while providing excellent educational and skill-building opportunities for students. High school coaches have agreed to teach and lead the clinics to expose new players to these sports and to develop their skills. NCE is well positioned to handle the marketing and registration for these programs as long as the overhead expenses can be covered, while the NHS Athletic Department oversees the programming. The coaches are more comfortable agreeing to run a clinic knowing that they do not handle the marketing and registration.

### Enabling Legislation

M.G.L. Chapter 71, Section 71E

### Description of Revenues:

Based on input from the Athletics Department, we are budgeting 55 registrants for the 3 Volleyball Clinics (two half-day and one full-day), 29 students for the Girls Basketball Clinics, 25 students for the Field Hockey Clinic, 30 students for Baseball, and 18 students for the Wrestling Clinics. In FY21 there will be a total of nine clinics. Total anticipated revenue for FY21 is \$21,165.

### Staffing:

There is no change in the FY21 budgeted staff members from previous year. The FY21 budget includes a portion of the NCE Adult/High School Program Coordinator (0.05 FTE) plus a portion of the Registrar (0.05 FTE) in addition to the Clinic staff who are paid stipends for their work as instructors and assistants.

A staffing chart for the program is presented below:

<b>FTE</b>	<b>FY19 Actual</b>	<b>FY20 Budget</b>	<b>FY20 Proj</b>	<b>FY21 Budget</b>	<b>Inc/(Dec)</b>
Admin	0.05	0.05	0.05	0.05	-
Clerical	0.05	0.05	0.05	0.05	-
<b>Total</b>	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	<b>-</b>

### **Expenses:**

In addition to the staffing expense, program expenses for FY21 include a nurse, supplies, and credit card fees, as well as new sports equipment bought with funds accrued over the past few years to replace older sports equipment. The total program expense is \$20,410.

### **Fund Balance:**

The projected ending fund balance is \$15,787. We are holding an equipment replacement contingency of \$10,000 and the balance of \$5,787 goes toward the 3-month operating contingency.

### **FY21 Proposed Budget:**

The proposed budget for the fee-based Summer Sports Clinics program is attached.

## Revolving Fund FY21 Budget Request

<b>Fund Name:</b>	<b>NCE Early Childcare Program (2350-3708)</b>
<b>Fund Manager:</b>	<b>Early Childcare Director-Teacher / Needham Community Education</b>
<b>Executive Summary:</b>	<b>The NCE Early Childcare Program (ECP) is a fee-based, developmentally appropriate enrichment program designed to address an unmet need for early childcare for the Needham Public Schools' staff. The program runs from 7:00 am to 4:00 pm during the 183 contracted workdays for staff, and also is available to Town of Needham employees and the community. FY21 fees for annual tuition remain the same as FY20 fees. The ECP Program continues in offsite leased space.</b>

### Fund Description:

The NCE Early Childcare program, launched in FY20, is a fee-based, developmentally appropriate enrichment program designed to address an unmet need for early childcare for the Needham Public Schools' staff. To benefit staff, the program runs from 7:00 am to 4:00 pm during the 183 contracted workdays. The program also is available to Town of Needham employees and the community. Children can attend 2 to 5 days per week at \$110 per day for Infants and \$100 per day for Toddlers. In our first year of operation, 10 infants and 3 toddlers enrolled in the program to date with the potential to enroll more children as the year progresses.

### Critical Issues:

- 1) **Unmet Need:** The staff's need for early childcare is expressed routinely to those in the NPS Human Resources department. Every school year, a substantial number of staff are on maternity leave and the staff are interested in returning to work, but have great difficulty in finding early childcare. Based on our first year's experience with this program, when staff are looking for low-cost options, they combine part-time enrollment in the NCE Early Childcare Program with family care for their child. Therefore, the NCE Early Childcare Program offers 2-day, 3-day, 4-day and 5-day per week options. In FY21, we are committed to continuing the program for all currently enrolled families.
- 2) **Cost:** Like those in other districts offering similar programs (e.g., Arlington, Mansfield, Medway), Needham Public Schools staff perceive early childcare provided by NCE as a benefit of working for the District. Recent research on private daycare programs serving Needham indicates a range of fees from \$99/day to \$147/day. School Districts offering programs within their school buildings (without an expense for leasing space) cost slightly over \$60/day on average. The fee for our program in FY20 and FY21 factors in start-up costs and working toward a fund balance in line with solid business practice of 3 months operating expenses in reserve. NCE will continue to work on driving down costs in future years.
- 3) **Space Requirement:** Since Needham Public Schools do not have enough space to accommodate an NCE Early Childcare program, it is necessary to lease space. Our lease continues in FY21 with the Needham Congregational Church.

## Enabling Legislation

M.G.L. Chapter 71, Section 26A.

### Staffing:

The FY21 staff funded through this revolving fund covers 3 classrooms and includes a full-time FTE Early Childcare Program Coordinator who provides both administration and teaching services. Administrators include 0.8 FTE Coordinator (up from 0.5 FTE in FY20) and a 0.01 FTE Community Ed Department Director. A total of 2.2 FTE teachers are budgeted, including 0.2 FTE of the Coordinator's time. The remaining staff include 1.4 FTE instructional aides, the Community Education Registrar/Marketing Manager (0.03 FTE) and the Bookkeeper (0.05 FTE). The FY20 projection shows a decrease in staff associated with lower and part-time enrollments of children in both classrooms. A staffing chart for the program follows:

	<b>FY20 Budget</b>	<b>FY20 Proj</b>	<b>FY21 Budget</b>	<b>Inc/(Dec)</b>
<b>Early Childcare Staffing</b>	<b>FTE</b>	<b>FTE</b>	<b>FTE</b>	<b>Budget</b>
Admin	0.51	0.51	0.81	0.30
Teachers	2.00	1.50	2.20	0.20
Aides	2.00	0.77	1.40	(0.60)
Clerical	0.05	0.08	0.08	0.03
<b>Total</b>	<b>4.56</b>	<b>2.86</b>	<b>4.69</b>	<b>(0.07)</b>

### Description of Revenues:

The budgeted FY21 revenue of \$289,346 is generated from a 3-classroom model comprised of continuing participation in the program by our current families and conservative growth. The full year projection includes the tuition of current families and maintains the mix of 2-day, 3-day, 4-day and 5-day options experienced in FY20. The FY21 tuition for the current families reflects full-year costs, not the FY20 experience when some students started the program later in the year. In addition, we conservatively budgeted 5 additional children in the FY21 program.

Based on recent market research, NCE's program fee of \$110/day for infants and \$110/day for toddlers is less expensive than most private daycare programs serving the Needham community which run from \$99/day to \$146/day. The tuition rate for early childcare programs in neighboring districts (Arlington, Medway, Mansfield) is significantly lower at slightly over \$60/day on average; these programs are housed within their school buildings and the fee is driven by an enrollment that grew to 60 children over a period of 6 years.

**Expenses:**

Budgeted FY21 expenses total \$264,251 and include supplies, direct program expenses for staff (including Lead Teachers, Assistant Teachers, and the Director/Teacher), as well as leased space. The indirect or overhead expenses include a portion of the salaries of the administrative and clerical staff. There are no marketing expenses because slots will be filled through word-of-mouth advertising and direct outreach to staff to identify prospective families.

**Fund Balance:**

To promote solid business practices, our goal is to hold three months operating expenses in carry-over reserves. The program is projected to have an ending fund balance of \$35,377 at the end of our second year of operation, which is 45% of the goal.

**FY21 Proposed Budget:**

The proposed budget for the fee-based NCE Early Childcare program is attached.



## Revolving Fund FY21 Budget Request

<b>Fund Name:</b>	<b>NCE Adult (2551-3705)</b>
<b>Fund Manager:</b>	<b>Adult Program Coordinator/ Needham Community Education</b>
<b>Executive Summary:</b>	<b>No change in program or fee structure; fees range from \$15 to \$665 for 270 course offerings, which are budgeted to serve 2,555 registrants.</b>

### Fund Description:

NCE Adult offers classes in Fall, Winter/Spring, and Summer. Each term includes a wide variety of reasonably priced courses that provide adults with quality lifelong learning experiences, as well as SAT/ACT test preparation and a community service program for high school students.

### Critical Issues:

The Adult program continues to experience popularity with 266 courses projected for FY20 and 2,517 registrants. This continues the trend of year-over-year growth, which is attributable to delivering high quality programs (as measured through post-program surveys) and offering a larger number of short-duration programs. We believe this model appeals to the participants; it will be continued in FY21 with more daytime classes, one-time classes, and weekend offerings.

The challenges to additional growth are finding novel programs that attract new audiences, continuing to adapt the schedule to provide more opportunities for community participation, and identifying appropriate spaces for the variety of courses requested (e.g., art, health and well-being, technology, language, etc.). Beyond our use of the Senior Center and partnerships with Olin College and Beth Israel Deaconess, we continue to look for solutions to space constraints.

In addition to providing programs for adults, in FY21 we project providing SAT and ACT prep classes to 239 high school students, up from 150 high school students in FY20. Growing this enrollment in FY21 is difficult due to competition from private providers of similar test prep programs.

### Enabling Legislation:

M.G.L. Chapter 71, Section 71E

### Description of Revenues:

The FY21 budgeted revenue of \$328,935 is generated from 270 courses. Proven classes are budgeted to run close to capacity and additional offerings will accommodate the needs of prospective new registrants. Course prices range from \$15 to \$665 (same as in FY20) with the average at about \$115 per course.

### **Staffing:**

The FY21 Budget includes 0.10 FTE of the Program Director, 0.76 FTE of the Program Coordinator, and 0.34 FTE clerical staff consisting of the Community Education Registrar/Marketing Manager (0.25 FTE) and the Bookkeeper (0.09 FTE.) The clerical FTE allocation is reduced 0.13 FTE in FY20, to remove graphic design support, as well as a 0.1 FTE vacant secretarial position. In addition, the Department pays part-time instructors, part-time SAT/ACT Prep coordinators, and temporary on-site coordinators.

FTE totals are as follows:

<b>FTE</b>	<b>FY19 Actual</b>	<b>FY20 Budget</b>	<b>FY20 Proj</b>	<b>FY21 Budget</b>	<b>Inc/(Dec) Budget</b>
Admin	0.86	0.86	0.86	0.86	-
Clerical	0.52	0.47	0.34	0.34	(0.13)
<b>Total</b>	<b>1.38</b>	<b>1.33</b>	<b>1.20</b>	<b>1.20</b>	<b>(0.13)</b>

### **Expenses:**

FY21 budgeted expenses total \$330,922. The biggest expenses for this program (aside from the instructors) are the costs for catalog design, production, and mailing. Although we have been looking at ways to achieve our marketing goals through cost-effective web-based communications, the catalog continues to be a worthwhile investment that brings in additional numbers of registrants.

### **Fund Balance:**

FY21 ending fund balance is projected to be \$20,783. We are continuing to rebuild the fund balance year over year toward a contingency reserve covering 3 months of operating expenses or \$99,277. In FY21, we will be at about 21% of that goal.

### **FY21 Proposed Budget:**

The proposed budget for the fee-based Adult Education program is attached.

	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	FY21 NCE TOTAL - Income and Expense Statement														
2															
3	FY21 NCE TOTAL - Income and Expense Statement						TOTAL	2,350	2,350	2,350	2,350	2,350	2,350	2,551	2,350
4								3,701	3,702	3,703	3,704	3,707	3,706	3,705	3,708
5								KASE	EASE	PASRAS	SS	SPORTS	TUTOR	AE	ECP
6	ENROLLMENT - ACTUAL						TOTAL								
7															
8															
9	Number of Students						5,946	-	1,166	653	1,397	157	-	2,555	18
10	Number of Courses						568	-	100	53	133	9	-	270	3
11	REVENUE														
12	Prior Year Surplus						234,326	-	67,638	8,627	109,975	15,032	-	22,771	10,283
13	Plus Pre-collections from Prior Year						-	-	-	-	-	-	-	-	-
14	Gross Beginning Fund Balance						234,326	-	67,638	8,627	109,975	15,032	-	22,771	10,283
15															
16															
17	Program Revenue														
18	Course Fees - Actual (net unrealized revenue)						1,237,270	-	179,295	92,007	326,503	21,165	20	328,935	289,346
19	Other Revenue						-	-	-	-	-	-	-	-	-
20	SUBTOTAL CURRENT REVENUE						1,237,270	-	179,295	92,007	326,503	21,165	20	328,935	289,346
21	Minus Unrealized Revenue (not reflected in Course Details spreadsheets)						-	-	-	-	-	-	-	-	-
22															
23	TOTAL REVENUE (Per Program Managers)						1,237,270	-	179,295	92,007	326,503	21,165	20	328,935	289,346
24															
25															
26															
27	EXPENSES - BUDGET														
28															
29	COURSE-SPECIFIC EXPENSES														
30	Instructional Salaries														
31	Classroom teachers: Professional Salaries						429,816	-	25,920	14,410	131,520	9,230	-	139,577	109,160
32	Instructions Assistant Salaries (Non-SPED Aides and Student Teachers)						71,742	-	10,538	4,000	21,168	-	-	-	36,036
33	Elememary Office Aides						3,000	-	-	-	-	-	-	-	3,000
34	Substitutes						-	-	-	-	-	-	-	-	-
35	Contractual Labor/ Services						-	-	-	-	-	-	-	-	-
36	Contract Services - course specific						148,896	-	87,066	26,856	5,187	-	-	29,787	-
37								-	-	-	-	-	-	-	-
38	Educational Supplies							-	-	-	-	-	-	-	-
39	Educational Supplies						26,780	-	980	1,600	18,950	750	-	4,500	-
40								-	-	-	-	-	-	-	-
41	Other/Course-specific							-	-	-	-	-	-	-	-
42	All Other Expenses/Course-specific						13,600	-	-	11,600	-	-	-	2,000	-
43	SUBTOTAL COURSE-SPECIFIC EXPENSES						693,834	-	124,504	58,466	176,825	9,980	-	175,863	148,196
44								-	-	-	-	-	-	-	-
45	PROGRAM-SPECIFIC ADMIN EXPENSES							-	-	-	-	-	-	-	-
46	On-site Coordinator							-	-	-	-	-	-	-	-
47	Instr. Coord --On Site Coord (plus KASE school aides)						46,658	-	17,600	-	25,758	500	-	2,800	-
48								-	-	-	-	-	-	-	-
49	Instructional Salaries							-	-	-	-	-	-	-	-
50	Instructional Assistants Salaries -- SPED Aides						8,000	-	4,000	-	4,000	-	-	-	-
51	Nurse						15,500	-	-	-	13,500	2,000	-	-	-
52							-	-	-	-	-	-	-	-	-
53	Instructional Equipment							-	-	-	-	-	-	-	-
54	Instructional Technology (<\$5,000 Unit) & Supplies						-	-	-	-	-	-	-	-	-
55	Instructional Technology Maintenance						-	-	-	-	-	-	-	-	-
56	Copiers						-	-	-	-	-	-	-	-	-
57								-	-	-	-	-	-	-	-

	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	
1	FY21 NCE TOTAL - Income and Expense Statement															
2																
3	FY21 NCE TOTAL - Income and Expense Statement								2,350	2,350	2,350	2,350	2,350	2,350	2,551	2,350
4									3,701	3,702	3,703	3,704	3,707	3,706	3,705	3,708
5								TOTAL	KASE	EASE	PASRAS	SS	SPORTS	TUTOR	AE	ECP
58									Contractual Labor/ Services		-	-	-	-	-	-
59	Contract Services - program specific	200	-	-	-	-	-	-	-	-	-	-	-	200		
60	Telephone/Internet (KASE)	1,600	-	-	-	-	-	-	-	-	-	-	-	1,600		
61			-	-	-	-	-	-	-	-	-	-	-	-		
62	Custodial Expenses		-	-	-	-	-	-	-	-	-	-	-	-		
63	Custodial Salaries	1,556	-	-	1,556	-	-	-	-	-	-	-	-	-		
64	Custodial and Housekeeping Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-		
65			-	-	-	-	-	-	-	-	-	-	-	-		
66	Transportation:		-	-	-	-	-	-	-	-	-	-	-	-		
67	Transportation of Students	-	-	-	-	-	-	-	-	-	-	-	-	-		
68	Transportation - bus replacement	-	-	-	-	-	-	-	-	-	-	-	-	-		
69			-	-	-	-	-	-	-	-	-	-	-	-		
70	Rental/Lease of Buildings & Facilities		-	-	-	-	-	-	-	-	-	-	-	-		
71	Facility Rental	19,204	-	-	-	-	-	-	-	-	-	-	-	19,204		
72			-	-	-	-	-	-	-	-	-	-	-	-		
73	Professional Development		-	-	-	-	-	-	-	-	-	-	-	-		
74	Prof Development Stipends	-	-	-	-	-	-	-	-	-	-	-	-	-		
75	Contractual Professional Development	-	-	-	-	-	-	-	-	-	-	-	-	-		
76	In-State Travel	-	-	-	-	-	-	-	-	-	-	-	-	-		
77	Out-of-State Travel	-	-	-	-	-	-	-	-	-	-	-	-	-		
78	Full Day Kindergarten Consulting	-	-	-	-	-	-	-	-	-	-	-	-	-		
79			-	-	-	-	-	-	-	-	-	-	-	-		
80	Promotion Expenses/General Program Expenses		-	-	-	-	-	-	-	-	-	-	-	-		
81	Printing & Binding	29,390	-	2,150	540	2,500	-		24,000	200						
82	Communication Postage	5,000	-	-	-	-	-	-	5,000	-						
83	Graphic Design	3,000	-	-	-	-	-	-	3,000	-						
84			-	-	-	-	-	-	-	-						
85	Supplies		-	-	-	-	-	-	-	-						
86	Office Supplies/ Director Office	-	-	-	-	-	-	-	-	-						
87			-	-	-	-	-	-	-	-						
88			-	-	-	-	-	-	-	-						
89	All Other Expenses		-	-	-	-	-	-	-	-						
90	All Other Expenses /Program Level (includes CC fees)	32,500	-	6,000	3,000	10,500	1,000		12,000	-						
91	Course Refunds	-	-	-	-	-	-	-	-	-						
92	SUBTOTAL PROGRAM SPECIFIC ADMIN EXPENSES	140,004	-	25,650	5,096	56,258	3,500	-	46,800	2,700						
93			-	-	-	-	-	-	-	-						
94	SUBTOTAL COURSE AND PROGRAM SPECIFIC EXPENSES	852,342	-	150,154	63,562	233,083	13,480	-	222,663	169,400						
95																
96	NCE GENERAL AND ADMINISTRATIVE															
97																
98	Administrative Salaries															
99	Other District-Wide Administration	78,059	-	11,151	5,576	45,999	-	-	13,939	1,394						
100	Adj: Other District-Wide Administration (for JE)	20	-	-	-	-	-	20	-	-						
101	Subtotal	78,079	-	11,151	5,576	45,999	-		20	13,939	1,394					
102																
103	Curriculum Directors (Supervisory): Prof. Salaries	150,648	-	13,123	15,771	31,926	3,919	-	74,452	11,457						
104	Adj: Curriculum Directors (Supervisory): Prof. Salaries Retirement Payout)	-	-	-	-	-	-	-	-	-						
105	Subtotal	150,648	-	13,123	15,771	31,926	3,919	-	74,452	11,457						
106																
107	Curriculum Directors (Supervisory): Clerical Salaried and Hourly	63,179	-	9,764	5,150	20,937	3,011	-	19,868	4,449						
108	Adj: Curriculum Directors (Supervisory): Clerical Salaries (for JE)	-	-	-	-	-	-	-	-	-						
109	Subtotal	63,179	-	9,764	5,150	20,937	3,011	-	19,868	4,449						
110																

	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	FY21 NCE TOTAL - Income and Expense Statement														
2															
3															
4	FY21 NCE TOTAL - Income and Expense Statement						TOTAL	2,350	2,350	2,350	2,350	2,350	2,350	2,551	2,350
5								3,701	3,702	3,703	3,704	3,707	3,706	3,705	3,708
6	KASE	EASE	PASRAS	SS	SPORTS	TUTOR		AE	ECP						
111	Benefits						77,551	-	-	-	-	-	-	-	77,551
112	Insurance for Active Employees							-	-	-	-	-	-	-	
113	Employer Retirement Contributions							-	-	-	-	-	-	-	
114															
115	Capital Equipment						-	-							
116	Additional Equipment (Over \$5000)							-							
117	SUBTOTAL NCE G&A							369,457	-	34,038	26,497	98,862	6,930	20	108,259
118															
119	GRAND TOTAL EXPENSES						1,221,799	-	184,192	90,059	331,945	20,410	20	330,922	264,251
120															
121															
122	NET INCOME - NCE OVERALL						15,471	-	(4,897)	1,948	(5,442)	755	-	(1,988)	25,094
123															
124															
125	FUND BALANCE - Current Year														
126															
127	Beginning Fund Balance						234,326	-	67,638	8,627	109,975	15,032	-	22,771	10,283
128															
129	Plus Current Year Revenue						1,237,270	-	179,295	92,007	326,503	21,165	20	328,935	289,346
130	Less Current Year Expense						1,221,799	-	184,192	90,059	331,945	20,410	20	330,922	264,251
131	Surplus of Revenue Over Expense						15,471	-	(4,897)	1,948	(5,442)	755	-	(1,988)	25,094
132															
133	GROSS ENDING FUND BALANCE						249,797	-	62,742	10,575	104,533	15,787	-	20,783	35,377
134															
135	ENCUMBRANCES ADJUSTMENTS (to Gross Ending Fund Balance)														
136	Less Contingency TA/SPED Assistants						12,258	-	12,258	-	-	-	-	-	-
137	Less Contingency for Equipment Replacement						10,000	-	-	-	-	10,000	-	-	-
138	Less K spending encumbrances						-	-	-	-	-	-	-	-	-
139	Less Restricted for Operating Contingency (Target 3 Mo Reserves)						222,589	-	50,484	10,575	99,584	5,787	-	20,783	35,377
140	Unrestricted Fund Balance						4,949	-	-	-	4,949	-	-	-	-
141															
142	3 Months Carryover Goal						366,540	-	55,257	27,018	99,584	6,123	6	99,277	79,275
143	% 3 Months Carryover Goal Realized						68.1% N/A		113.5%	39.1%	105.0%	257.8%	0.0%	20.9%	44.6%

	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH			
1	FY20 NCE TOTAL - Income and Expense Statement																	
2																		
3	FY20 NCE TOTAL - Income and Expense Statement							TOTAL	2350	2350	2350	2350	2350	2350	2551	2350		
4									3701	3702	3703	3704	3707	3706	3705	3708		
5									KASE	EASE	PASRAS	SS	SPORTS	TUTOR	AE	ECP		
6	ENROLLMENT - ACTUAL							7,428	-	1,042	2,308	1,386	162	-	2,517	13		
8									Number of Students	543	-	87	49	130	9	-	266	2
9									Number of Courses									
10	REVENUE							246,221	6,776	73,602	18,878	91,601	31,676	120	23,568	-		
12									Prior Year Surplus	-	-	-	-	-	-	-	-	-
13									Plus Pre-collections from Prior Year	246,221	6,776	73,602	18,878	91,601	31,676	120	23,568	-
14								246,221	6,776	73,602	18,878	91,601	31,676	120	23,568	-		
15																		
16																		
17	Program Revenue																	
18	Course Fees - Actual (net unrealized revenue)							1,068,945	249	154,133	106,910	315,522	11,775	20	325,312	155,024		
19	Other Revenue							-	-	-	-	-	-	-	-	-		
20	SUBTOTAL CURRENT REVENUE							1,068,945	249	154,133	106,910	315,522	11,775	20	325,312	155,024		
21	Minus Unrealized Revenue (not reflected in Course Details spreadsheets)							-	-	-	-	-	-	-	-	-		
22																		
23	TOTAL REVENUE (Per Program Managers)							1,068,945	249	154,133	106,910	315,522	11,775	20	325,312	155,024		
24																		
25																		
26																		
27	EXPENSES - BUDGET																	
28																		
29	COURSE-SPECIFIC EXPENSES																	
30	Instructional Salaries																	
31	Classroom teachers: Professional Salaries							408,904	-	24,760	51,568	126,690	9,505	-	138,087	58,294		
32	Instructions Assistant Salaries (Non-SPED Aides and Student Teachers)							71,084	-	9,375	3,000	34,934	-	-	-	23,774		
33	Elememary Office Aides							-	-	-	-	-	-	-	-	-		
34	Substitutes							-	-	-	-	-	-	-	-	-		
35	Contractual Labor/ Services							-	-	-	-	-	-	-	-	-		
36	Contract Services - course specific							138,534	-	76,162	22,608	10,927	-	-	28,837	-		
37								-	-	-	-	-	-	-	-	-		
38	Educational Supplies							-	-	-	-	-	-	-	-	-		
39	Educational Supplies							21,529	(242)	880	1,800	8,611	2,668	-	4,490	3,321		
40								-	-	-	-	-	-	-	-	-		
41	Other/Course-specific							-	-	-	-	-	-	-	-	-		
42	All Other Expenses/Course-specific							10,003	-	-	5,400	-	-	-	1,922	2,681		
43	SUBTOTAL COURSE-SPECIFIC EXPENSES							650,053	(242)	111,177	84,376	181,162	12,173	-	173,336	88,071		
44								-	-	-	-	-	-	-	-	-		
45	PROGRAM-SPECIFIC ADMIN EXPENSES							-	-	-	-	-	-	-	-	-		
46	On-site Coordinator							-	-	-	-	-	-	-	-	-		
47	Instr. Coord --On Site Coord (plus KASE school aides)							30,310	-	17,600	-	3,210	6,800	-	2,700	-		
48								-	-	-	-	-	-	-	-	-		
49	Instructional Salaries							-	-	-	-	-	-	-	-	-		
50	Instructional Assistants Salaries -- SPED Aides							-	-	-	-	-	-	-	-	-		
51	Nurse							12,938	-	-	-	12,688	250	-	-	-		
52								-	-	-	-	-	-	-	-	-		
53	Instructional Equipment							-	-	-	-	-	-	-	-	-		
54	Instructional Technology (<\$5,000 Unit) & Supplies							-	-	-	-	-	-	-	-	-		
55	Instructional Technology Maintenance							-	-	-	-	-	-	-	-	-		
56	Copiers							170	-	-	-	-	-	-	-	170		
57								-	-	-	-	-	-	-	-	-		

	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	
1	FY20 NCE TOTAL - Income and Expense Statement															
2																
3	FY20 NCE TOTAL - Income and Expense Statement							TOTAL	2350	2350	2350	2350	2350	2350	2551	2350
4									3701	3702	3703	3704	3707	3706	3705	3708
5									KASE	EASE	PASRAS	SS	SPORTS	TUTOR	AE	ECP
58	Contractual Labor/ Services								-	-	-	-	-	-	-	-
59	Contract Services - program specific							400	-	-	-	-	-	-	-	400
60	Telephone/Internet (KASE)							1,741	41	-	-	-	-	-	-	1,700
61									-	-	-	-	-	-	-	-
62	Custodial Expenses								-	-	-	-	-	-	-	-
63	Custodial Salaries							1,556	-	-	1,556	-	-	-	-	-
64	Custodial and Housekeeping Supplies							-	-	-	-	-	-	-	-	-
65									-	-	-	-	-	-	-	-
66	Transportation:								-	-	-	-	-	-	-	-
67	Transportation of Students							1,922	-	-	-	-	-	-	1,922	-
68	Transportation - bus replacement							-	-	-	-	-	-	-	-	-
69									-	-	-	-	-	-	-	-
70	Rental/Lease of Buildings & Facilities								-	-	-	-	-	-	-	-
71	Facility Rental							19,204	-	-	-	-	-	-	-	19,204
72									-	-	-	-	-	-	-	-
73	Professional Development								-	-	-	-	-	-	-	-
74	Prof Development Stipends							-	-	-	-	-	-	-	-	-
75	Contractual Professional Development							-	-	-	-	-	-	-	-	-
76	In-State Travel							190	-	-	-	190	-	-	-	-
77	Out-of-State Travel							-	-	-	-	-	-	-	-	-
78	Full Day Kindergarten Consulting							-	-	-	-	-	-	-	-	-
79									-	-	-	-	-	-	-	-
80	Promotion Expenses/General Program Expenses								-	-	-	-	-	-	-	-
81	Printing & Binding							27,740	-	3,200	540	-	-	-	24,000	-
82	Communication Postage							5,000	-	-	-	-	-	-	5,000	-
83	Graphic Design							3,000	-	-	-	-	-	-	3,000	-
84									-	-	-	-	-	-	-	-
85	Supplies								-	-	-	-	-	-	-	-
86	Office Supplies/ Director Office							-	-	-	-	-	-	-	-	-
87									-	-	-	-	-	-	-	-
88									-	-	-	-	-	-	-	-
89	All Other Expenses								-	-	-	-	-	-	-	-
90	All Other Expenses /Program Level (includes CC fees)							30,403	315	7,500	3,250	4,787	2,551	-	12,000	-
91	Course Refunds							1,951	-	-	-	-	-	-	-	1,951
92	SUBTOTAL PROGRAM SPECIFIC ADMIN EXPENSES							131,418	598	22,950	5,346	20,875	9,601	-	48,622	23,425
93									-	-	-	-	-	-	-	-
94	SUBTOTAL COURSE AND PROGRAM SPECIFIC EXPENSES							781,471	356	134,127	89,722	202,037	21,775	-	221,958	111,497
95																
96	NCE GENERAL AND ADMINISTRATIVE															
97																
98	Administrative Salaries															
99	Other District-Wide Administration							75,091	-	10,727	5,364	44,250	-	-	13,409	1,341
100	Adj: Other District-Wide Administration (for JE)							0	6,669	(6,809)	-	-	-	140	-	-
101	Subtotal							75,091	6,669	3,918	5,364	44,250	-	140	13,409	1,341
102																
103	Curriculum Directors (Supervisory): Prof. Salaries							161,520	-	12,624	15,222	30,710	3,771	-	71,643	27,550
104	Adj: Curriculum Directors (Supervisory): Prof. Salaries Retirement Payout)							-	-	-	-	-	-	-	-	-
105	Subtotal							161,520	-	12,624	15,222	30,710	3,771	-	71,643	27,550
106																
107	Curriculum Directors (Supervisory): Clerical Salaried and Hourly							62,757	-	9,428	6,853	20,151	2,873	-	19,098	4,354
108	Adj: Curriculum Directors (Supervisory): Clerical Salaries (for JE)							-	-	-	-	-	-	-	-	-
109	Subtotal							62,757	-	9,428	6,853	20,151	2,873	-	19,098	4,354
110																

	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	<b>FY20 NCE TOTAL - Income and Expense Statement</b>														
2															
3	<b>FY20 NCE TOTAL - Income and Expense Statement</b>					<b>TOTAL</b>		<b>2350</b>	<b>2350</b>	<b>2350</b>	<b>2350</b>	<b>2350</b>	<b>2350</b>	<b>2551</b>	<b>2350</b>
4								<b>3701</b>	<b>3702</b>	<b>3703</b>	<b>3704</b>	<b>3707</b>	<b>3706</b>	<b>3705</b>	<b>3708</b>
5								<b>KASE</b>	<b>EASE</b>	<b>PASRAS</b>	<b>SS</b>	<b>SPORTS</b>	<b>TUTOR</b>	<b>AE</b>	<b>ECP</b>
111	Benefits														
112	Insurance for Active Employees					-		-	-	-	-	-	-	-	-
113	Employer Retirement Contributions					-		-	-	-	-	-	-	-	-
114															
115	Capital Equipment														
116	Additional Equipment (Over \$5000)					-		-							
117	SUBTOTAL NCE G&A					299,368		6,669	25,970	27,439	95,111	6,644	140	104,150	33,245
118															
119	<b>GRAND TOTAL EXPENSES</b>					1,080,839		7,025	160,097	117,161	297,148	28,419	140	326,108	144,741
120															
121															
122	<b>NET INCOME - NCE OVERALL</b>					(11,894)		(6,776)	(5,964)	(10,251)	18,374	(16,644)	(120)	(797)	10,283
123															
124															
125	<b>FUND BALANCE - Current Year</b>														
126															
127	Beginning Fund Balance					246,221		6,776	73,602	18,878	91,601	31,676	120	23,568	-
128															
129	Plus Current Year Revenue					1,068,945		249	154,133	106,910	315,522	11,775	20	325,312	155,024
130	Less Current Year Expense					1,080,839		7,025	160,097	117,161	297,148	28,419	140	326,108	144,741
131	Surplus of Revenue Over Expense					(11,894)		(6,776)	(5,964)	(10,251)	18,374	(16,644)	(120)	(797)	10,283
132															
133	<b>GROSS ENDING FUND BALANCE</b>					234,327		-	67,638	8,627	109,975	15,032	-	22,771	10,283
134															
135	ENCUMBRANCES ADJUSTMENTS (to Gross Ending Fund Balance)														
136	Less K spending encumbrances					-		-	-	-	-	-	-	-	-
137	Less Contingency TA and SPED aides					40,000		-	25,000	-	15,000	-	-	-	-
138	Less Contingency for Equipment Replacement					10,000		-	-	-	-	10,000	-	-	-
139	<u>Less Restricted for Operating Contingency (Target 3 Mo Reserves)</u>					178,496		-	42,638	8,627	89,144	5,032	-	22,771	10,283
140	<b>Unrestricted Fund Balance</b>					5,831		-	-	-	5,831	-	-	-	-
141															
142	<b>3 Months Carryover Goal</b>					322,144		-	48,029	35,148	89,144	8,526	42	97,832	43,422
143	<b>% 3 Months Carry Over Goal Realized</b>					72.7%		N/A	140.8%	24.5%	123.4%	176.3%	0.0%	23.3%	23.7%



## Revolving Fund FY21 Budget Request

<b>Fund Name:</b>	<b>Preschool (2350-3610)</b>
<b>Fund Manager:</b>	<b>Preschool Program Director</b>
<b>Executive Summary:</b>	<ul style="list-style-type: none"><li>• <b>No Change to Program Fees: 3-Day Half-Day \$3,465; 3-Day Full-Day \$8,580; 4-Day Half-Day \$4,620; 4-Day Full-Day \$11,435.</b></li><li>• <b>No Change to Program Content</b></li></ul>

### Budget Overview:

This account funds the Integrated Preschool Program provided on a fee-basis to typically-developing youngsters at the Newman Elementary School. The Preschool Program provides services to three, four and five-year olds, three or four days per week on a full-day or half-day basis. The half-day programs run from 8:45 – 11:20 a.m. (morning session) and 12:30 – 3:10 p.m. (afternoon session.) The full-day program runs from 8:45 a.m. – 3:10 p.m. “Lunch Bunch,” a supervised lunch program, runs from 11:30 a.m. - 12:30 p.m. each day, and is offered to all students participating in the full-day program. (This program was eliminated for half-day students in FY20.) Fee-based programming also is available during the summer. The Preschool operates mixed-age classrooms designed to meet the diverse needs of our preschool students in a developmentally-appropriate setting.

The Preschool Program enrolls up to 66 special education students on IEP’s and up to 64-65 typically developing children from the Needham community. (The Preschool must maintain a student ratio of 8 typically developing students to 7 special education students in its integrated classrooms. The maximum of 64 represents half-day participation 'slots'.) The special needs population receives mandated special education services free of charge from the Needham Public Schools. The remaining children are "typically" developing children from the community, who pay tuition to attend the program. Preschool services for special education youngsters are funded through a combination of regular school operating budget and grant accounts (including the federal early childhood and special education entitlement grants.)

### Enabling Legislation:

M.G.L. Chapter 71 Section 47

### Critical Issues:

The prior year critical issue of low enrollment has been largely eliminated, with the introduction of a ‘full-day’ option for parents in need of full-day care, and a change in policy that opened enrollment to Needham staff members. The double session program has been popular for families. At the present time, the Preschool has reached its enrollment targets for FY20 and FY21, with a fluctuating wait list of about 25 students. This trend in enrollment has had a stabilizing influence on program revenue.

Thinking ahead to a future budget year, the Preschool has a need for a floating substitute position to cover vacancies in both teacher and teaching assistant positions. Given the need to maintain DESE staffing ratios and provide support for these very young students, a substitute is needed every time a teacher or teaching assistant is vacant. The floating substitute position is likely to be a more economical alternative to sub coverage than hiring building substitutes.

### **Support for District Vision, Mission, Goals and Objectives:**

The Preschool Program promotes the Portrait of a Needham Graduate by addressing Priority 2: All Students Experience Integrative Teaching and Learning, and Priority 3: All Students Learn and Grow within Adaptable Environments.

### **FY21 Combined Program Budget:**

The FY21 combined Preschool Program budget (detailed on Attachment A) derives resources from the school operating budget for mandated special needs services, the Preschool Revolving Fund for fee-based services to typically-developing students and two federal grants that support special needs staffing. The combined budget includes estimated resources of \$1,957,308 (including \$84,884 in estimated carry over balance), and anticipated expenses of \$1,846,602.

The planned resources of \$1,957,308 include an Operating Budget allocation of \$1,261,373; \$335,935 in revolving fee revenues; and \$275,116 in estimated grant revenues. In addition, \$84,884 in beginning fund balance is expected in the Revolving Fund. These revenues decrease \$96,380 from the current year, reflecting the fact that the \$109,200 budgeted in FY20 toward the purchase of a playground sun shade shelter (funded from \$69,200 in capital improvement funds and \$40,000 in fund balance reserves) will not repeat in FY21.

Total expenses are budgeted to be \$1,846,602, for the combined Preschool Program, including \$1,803,313 in salary expenses for 29.33 FTE staff members, \$9,264 in MTRS payments for grant-related personnel, and \$34,025 in supplies and services. The combined expenditure budget is \$75,215 less than the current year projected expenditure budget of \$1,921,818, reflecting the one-time expenditure of \$109,200 in FY20 for the sun shade shelter. The FY21 expenditure budget fully-funds all contractual step and cost of living adjustments for staff members.

The program is expected to end the year with a \$110,709 fund balance in the Revolving Fund. This balance represents accumulated surplus from operations that will function as contingency reserves to address cash flow requirements and fluctuations in enrollment. This reserve amount is \$17,676 more than the target fund balance amount of three months operating reserves (\$93,033), and will be adequate to cover unanticipated fluctuations in the operational budget for FY21.

The FY21 combined Preschool Program will be staffed by 29.33 FTE dedicated personnel, including a 1.0 FTE Coordinator, a 1.0 FTE Secretary, 10.41 FTE certified instructional personnel (including Teachers, Occupational Therapists, Speech Language Pathologists and a BCBA), a 1.0 FTE Nurse, and 15.92 FTE Instructional Assistants.

The following paragraphs focus on the Revolving Fund portion of this combined budget, which collects fees from typically developing students.

## FY21 Revolving Fund Budget:

### Revolving Fund Revenues:

FY21 revolving fund resources total \$420,819. These resources include \$335,935 in fee revenues, plus \$84,884 in budgeted beginning fund balance (carried forward from FY20.)

The FY21 budget assumes an 'at capacity' enrollment of 42 students, including: 5 three-day half-day students, 5 three-day full-day students, 14 four-day half-day students and 18 four-day full-day students. This enrollment, which equates to 65 half-day 'slots' (in which half-day enrollees are counted as one slot and full-day enrollees occupy two slots), represents the maximum number of typically developing students that can be enrolled and still preserve the ratio of special needs students to their typically-developing counterparts. It is consistent with the current year experience, as well. The Preschool has already collected deposits from these students.

Revolving fund revenue estimates are summarized in the chart below:

FY20 PROJ	FY20 Budget Classes	FY20 Budget Enrollment	FY20 Fee Per Student	FY20 Prepay Revenue in FY19	FY20 Revenue in FY20	FY20 Program Year Revenue
<u>School Year</u>						
3 Day Half Day	2	6	3,465	8,130	12,717	20,847
3 Day Full Day	1	4	8,580	10,524	23,940	34,464
4 Day Half-Day	6	14	4,620	20,867	42,023	62,890
<u>4 Day Full-Day</u>	2	19	<u>11,435</u>	<u>68,695</u>	<u>137,584</u>	<u>206,279</u>
		43		108,216	216,264	324,480
<u>Summer (3 2-wk Sessions)</u>						
6 wks/3-4 Days Per Week/2.5 Hrs/Day	<u>3</u>	<u>9</u>	<u>250/190</u>	<u>5,186</u>	<u>-</u>	<u>5,186</u>
Subtotal	3	9	-	5,186	-	5,186
Lunch Bunch - Half Day Paid	-	-	\$16.50/Day	-	-	-
Total				113,402	216,264	329,666

Variance - FY20 Proj Over FY20 Budget	(15,782)	8,774	(7,008)
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FY21 Budget	FY21 Budget Classes	FY21 Budget Enrollment	FY21 Fee Per Student	FY21 Prepay Revenue in FY20	FY21 Revenue FY21	FY21 Program Year Revenue
<u>School Year</u>						
3 Day Half Day	2	5	3,465	6,775	10,550	17,325
3 Day Full Day	1	5	8,580	16,300	26,600	42,900
4 Day Half-Day	6	14	4,620	24,360	40,320	64,680
<u>4 Day Full-Day</u>	2	18	<u>11,435</u>	<u>75,810</u>	<u>130,020</u>	<u>205,830</u>
		42		123,245	207,490	330,735
<u>Summer (3 2-wk Sessions)</u>						
6 wks/3-4 Days Per Week/2.5 Hrs/Day	<u>3</u>	<u>17</u>	<u>250/190</u>	<u>5,200</u>	<u>-</u>	<u>5,200</u>
Subtotal	3	17	-	5,200	-	5,200
Lunch Bunch - Half Day Paid	-	-	\$16.50/Day	-	-	-
Total				128,445	207,490	335,935

Variance - FY21 Budget Over FY20 Proj	15,043	(8,774)	6,269
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The FY21 fee structure is the same as the current year:

- 3-Day Half Day: \$3,465
- 4-Day Half-Day: \$4,620
- 3-Day Full-Day: \$8,580, which is the equivalent of two 3-Day Half Day Fees (\$6,930), plus 100 Lunch Bunch Days x \$16.50/Day.
- 4-Day Full-Day: \$11,435, which is the equivalent of two 4-Day Half Day Fees (\$9,240), plus 133 Lunch Bunch Days x \$16.50/Day

The historical fees from the past ten years are displayed below. The last year that fees were increased was FY18.

Historical Fees	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
3-Day Half Day	2,925	2,925	2,925	3,150	3,150	3,150	3,150	3,465	3,465	3,465	3,465
4-Day Half Day AM	3,900	3,900	3,900	4,200	4,200	4,200	4,200	4,620	4,620	4,620	4,620
4-Day Half Day PM	3,900	3,900	3,900	4,200	4,200	4,200	4,200	4,620	4,620	4,620	4,620
3-Day Full Day								8,580	8,580	8,580	8,580
4-Day Full Day								11,435	11,435	11,435	11,435
Extended Day	37.90/Hr	37.90/Hr	37.90/Hr								
Lunch Bunch	\$15/Day	\$15/Day	\$15/Day	\$15/Day	\$15/Day	\$15/Day	\$15/Day	\$16.5/Day	\$16.5/Day	NA	NA
Summer Program (:	600	600	600	675	675	675	675	750	750	750	750

The summer program consists of three (3) two-week sessions, at a cost of \$250 per child (per session) for the four-day program and \$190 per child (per session) for the three-day program. The budget is based on the current year experience of approximately 9 students attending both the 3 and 4-day programs. Anticipated revenues are \$5,200 for FY21, based on FY20 actual collections.

## Revolving Fund Expenses:

Revolving fund expenditures total \$310,110. Salary expenses include contractual step and cost of living adjustments for the 5.2 FTE staff members assigned to this account. The Preschool Revolving Fund supports the following staff members:

FTE	FY19 Actual	FY20 Budget	FY20 Proj	FY21 Budget	Inc/(Dec) Over FY20
Admin	0.50	0.50	0.50	0.50	0
Teachers/Nurse	1.25	1.25	1.25	1.25	0
Aides	2.68	2.68	2.65	2.65	0
Clerical	0.80	0.80	0.80	0.80	0
<b>Total</b>	<b>5.23</b>	<b>5.23</b>	<b>5.20</b>	<b>5.20</b>	<b>0</b>

FY21 Revolving Fund staff total 5.20 FTE, the same as FY20.

**Ending Fund Balance:**

The program is expected to end the year with a \$110,709 in fund balance in the Revolving Fund. This balance represents accumulated surplus from operations that will function as contingency reserves to address cash flow requirements and fluctuations in enrollment. This reserve amount is \$17,676 more than the target fund balance amount of three months operating reserves (\$93,033), and will be adequate to cover unanticipated fluctuations in the operational budget for FY21.

**FY21 Program Budget:**

See attached.

# FY21 Preschool Budget

FY21 Preschool Combined Program Budget	FY21 BUDGET FTE	FY21 BUDGET Operating	FY21 BUDGET FTE	FY21 BUDGET Revolving	FY21 BUDGET FTE	FY21 BUDGET EC Grant	FY21 BUDGET FTE	FY21 BUDGET 94-142	FY21 BUDGET FTE	FY21 CAPITAL BUDGET CIP	FY21 BUDGET FTE	FY21 BUDGET Total \$	\$ Inc FY21 BUD Over FY20 Proj
<b><u>Beginning Carry-Over Balance</u></b>													
Undesignated Carry-Over (Surplus from Operations)				84,884								84,884	(23,572)
Precollected Fees (Next Fiscal Year)		-		-	-	-	-	-	-	-	-	-	-
<b>BEGINNING CARRY OVER</b>		-		<b>84,884</b>	-	-	-	-	-	-	-	<b>84,884</b>	<b>(23,572)</b>
<b><u>Current Revenue</u></b>													
Operating Budget - Staff Salary		1,180,826										1,180,826	(6,325)
Operating Budget - Non-Salary		7,250										7,250	-
Operating - Summer Services Salary		73,297										73,297	1,331
Grant Revenue		-				33,230		241,886		-	-	275,116	(4,883)
Fee Revenues - Precollected Prior Year		-		128,445								128,445	15,043
Fee Revenues - Current Year		-		207,490								207,490	(8,774)
Capital Outlay - CIP Revenues		-		-		-	-	-	-	-	-	-	(69,200)
<b>TOTAL CURRENT REVENUE</b>	<b>1,261,373</b>			<b>335,935</b>	-	<b>33,230</b>	-	<b>241,886</b>	-	-	-	<b>1,872,424</b>	<b>(72,808)</b>
<b><u>Current Expense</u></b>													
<b><u>Certified Instructional Staff</u></b>													
Summer Teacher Salary		44,141										44,141	802
Professional Dev. Coaches												-	-
NA												-	-
Preschool Teacher	0.50	36,937	0.50	36,937							1.00	73,874	4,898
Preschool Teacher	1.00	58,237									1.00	58,237	3,585
Preschool Teacher	0.28	17,185					0.52	31,566			0.80	48,751	3,075
Preschool Teacher	1.00	107,834									1.00	107,834	2,075
Preschool Teacher	1.00	107,636									1.00	107,636	2,111
Preschool Teacher	0.55	56,666				-	0.45	46,363	-	-	1.00	103,029	5,745
Preschool Teacher/ BCBA	1.00	97,677					-	-			1.00	97,677	1,915
Preschool Teacher/ BCBA Per Diem		-										-	-
Preschool Teacher	1.00	107,636									1.00	107,636	2,111
Preschool Teacher												-	-
Preschool Teacher/ SLP	0.75	70,555	0.25	23,518							1.00	94,073	3,653
Preschool Director	0.50	64,942	0.50	64,942							1.00	129,884	3,774
Preschool Teacher/ OT	0.91	89,305									0.91	89,305	1,751
Preschool Teacher/ OT	0.70	76,605	-	-	-	-	-	-	-	-	0.70	76,605	4,273
Subtotal	9.19	935,356	1.25	125,397	-	-	0.97	77,929	-	-	11.41	1,138,682	39,768
Nurse Salary	0.15	11,706	0.50	35,562	-	-	0.35	25,009	-	-	1.00	72,277	(29,100)
Subtotal	0.15	11,706	0.50	35,562	-	-	0.35	25,009	-	-	1.00	72,277	(29,100)
<b><u>Instructional Assistants</u></b>													
Preschool Teaching Assistant - COTA												-	-
New Position - Program Specialist (Trxfr from SLC)												-	-
Summer Staff												-	-
Preschool Teaching Assistants - Summer		29,156										29,156	530
Preschool Teaching Assistant							0.86	29,667			0.86	29,667	564
Preschool Teaching Assistant							0.86	29,667			0.86	29,667	564
Preschool Teaching Assistant	0.14	4,852					0.59	20,289			0.73	25,141	483
Preschool Teaching Assistant			0.29	8,138	0.45	12,707			-		0.74	20,845	1,949
Preschool Teaching Assistant	0.06	1,710					0.74	22,802			0.80	24,512	2,291
Preschool Teaching Assistant	0.15	4,948	0.70	22,539							0.85	27,487	1,954
Preschool Teaching Assistant	0.15	4,335			0.70	19,748					0.85	24,083	2,251
Preschool Teaching Assistant	0.85	27,487									0.85	27,487	1,954
Preschool Teaching Assistant	0.85	24,083									0.85	24,083	2,251
Preschool Teaching Assistant	0.85	27,487									0.85	27,487	1,954
Preschool Teaching Assistant			0.86	29,917							0.86	29,917	564
Preschool Teaching Assistant	0.85	26,044									0.85	26,044	2,434
Preschool Teaching Assistant	0.80	27,499									0.80	27,499	526
Preschool Teaching Assistant	0.74	25,142									0.74	25,142	485
Preschool Teaching Assistant	0.40	19,156									0.40	19,156	375
Preschool Teaching Assistant			0.80	27,499							0.80	27,499	526
Preschool Teaching Assistant	0.85	28,527									0.85	28,527	559
Preschool Teaching Assistant							0.79	27,259			0.79	27,259	521
Preschool Teaching Assistant	0.74	23,791									0.74	23,791	1,691
Preschool Teaching Assistant											-	-	-
Preschool Teaching Assistant											-	-	-
Preschool Teaching Assistant	0.85	24,083									0.85	24,083	2,251
Preschool Teaching Assistant											-	-	-
Preschool Teaching Assistant	-	-	-	-	-	-	-	-	-	-	-	-	-
Subtotal	8.28	298,300	2.65	88,093	1.15	32,455	3.84	129,684	-	-	15.92	548,532	26,677

# FY21 Preschool Budget

FY21 Preschool Combined Program Budget	FY21 BUDGET FTE	FY21 BUDGET Operating	FY21 BUDGET FTE	FY21 BUDGET Revolving	FY21 BUDGET FTE	FY21 BUDGET EC Grant	FY21 BUDGET FTE	FY21 BUDGET 94-142	FY21 BUDGET FTE	FY21 CAPITAL BUDGET CIP	FY21 BUDGET FTE	FY21 BUDGET Total \$	\$ Inc FY21 BUD Over FY20 Proj
Preschool Secretary	0.20	8,764	0.80	35,058	-	-	-	-	-	-	1.00	43,822	859
Subtotal	0.20	8,764	0.80	35,058	-	-	-	-	-	-	1.00	43,822	859
MTRS Retirement Expense @ 9%	-	-	-	-	-	-	-	9,264	-	-	-	9,264	(491)
Subtotal	-	-	-	-	-	-	-	9,264	-	-	-	9,264	(491)
<b>Non-Salary Expenses</b>													
Educational Supplies		4,000		7,500						-	-	11,500	101
Educational Supplies - Private School (STJ)				-		775				-	-	775	2
Textbooks/ Instructional Materials				-						-	-	-	-
Capital Outlay - Sunshade				-						-	-	-	(109,200)
Mileage/ In-State				600						-	-	600	-
Other Expenses		-		100						-	-	100	(674)
Office Supplies				2,000						-	-	2,000	-
Professional Development Conferences		-		-						-	-	-	(1,785)
Reference Materials		500		-						-	-	500	(33)
Other Services		-		15,000						-	-	15,000	1,745
Instructional Technology		1,550		-						-	-	1,550	1,050
Instructional Software		-		-						-	-	-	(685)
Testing Supplies		1,200		-						-	-	1,200	200
Instructional Equipment		-		-						-	-	-	(3,650)
Memberships		-		800	-	-	-	-	-	-	-	800	-
		7,250		26,000	-	775	-	-	-	-	-	34,025	(112,929)
<b>TOTAL EXPENSES</b>	<b>17.83</b>	<b>1,261,373</b>	<b>5.20</b>	<b>310,110</b>	<b>1.15</b>	<b>33,230</b>	<b>5.16</b>	<b>241,886</b>	<b>-</b>	<b>-</b>	<b>29.33</b>	<b>1,846,602</b>	<b>(75,215)</b>
<b>UNDER/(OVER) AVAIL REV</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>110,709</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>110,709</b>	<b>-</b>

Current Rev	335,935
Current Expense	310,110
Current Surplus/(Deficit)	25,825
Target Fund Balance (3 Mo)	93,033
Unreserved Over/(Under) Target Fund Balance	17,676

# FY20 Preschool Projection

FY20 Projected Preschool Combined Program E	FY20 PROJ FTE	FY20 PROJ Operating	FY20 PROJ FTE	FY20 PROJ Revolving	FY20 PROJ FTE	FY20 PROJ EC Grant	FY20 PROJ FTE	FY20 PROJ 94-142	FY20 PROJ FTE	FY20 CAPITAL PROJ CIP	FY20 PROJ FTE	FY20 PROJ Total \$	\$ Inc FY20 Proj Over FY20 Bud
<b>Beginning Carry-Over Balance</b>													
Undesignated Carry-Over (Surplus from Operations)				108,456							-	108,456	160
Precollected Fees (Next Fiscal Year)		-		-		-	-	-	-	-	-	-	-
<b>BEGINNING CARRY OVER</b>		-		<b>108,456</b>		-	-	-	-	-	-	<b>108,456</b>	<b>160</b>
<b>Current Revenue</b>													
Operating Budget - Staff Salary		1,187,151									-	1,187,151	6,867
Operating Budget - Non-Salary		7,250									-	7,250	-
Operating - Summer Services Salary		71,965									-	71,965	14,100
Grant Revenue		-				36,342		243,658	-	-	-	280,000	14,263
Fee Revenues - Precollected Prior Year		-		113,402							-	113,402	(15,782)
Fee Revenues - Current Year		-		216,264							-	216,264	8,774
Capital Outlay - CIP Revenues		-		-		-	-	-	-	69,200	-	69,200	-
<b>TOTAL CURRENT REVENUE</b>		<b>1,266,367</b>		<b>329,666</b>		<b>- 36,342</b>		<b>- 243,658</b>		<b>- 69,200</b>		<b>- 1,945,232</b>	<b>28,223</b>
<b>Current Expense</b>													
<b>Certified Instructional Staff</b>													
Summer Teacher Salary		43,339									-	43,339	15,363
Professional Dev. Coaches											-	-	-
NA											-	-	-
Preschool Teacher	0.50	34,488	0.50	34,488							1.00	68,976	(238)
Preschool Teacher	1.00	54,652									1.00	54,652	(14,562)
Preschool Teacher	0.28	16,101					0.52	29,575			0.80	45,676	(8,558)
Preschool Teacher	1.00	105,759									1.00	105,759	142
Preschool Teacher	1.00	105,525									1.00	105,525	(364)
Preschool Teacher	0.55	53,506					0.45	43,778	-	-	1.00	97,284	(335)
Preschool Teacher/ BCBA	1.00	95,762					-	-			1.00	95,762	(330)
Preschool Teacher/ BCBA Per Diem		-									-	-	(12,602)
Preschool Teacher	1.00	105,525									1.00	105,525	(364)
Preschool Teacher											-	-	-
Preschool Teacher/ SLP	0.75	67,815	0.25	22,605							1.00	90,420	(312)
Preschool Director	0.50	63,055	0.50	63,055							1.00	126,110	-
Preschool Teacher/ OT	0.91	87,554									0.91	87,554	(302)
Preschool Teacher/ OT	0.70	72,332									0.70	72,332	(250)
Subtotal	9.19	905,413	1.25	120,148			0.97	73,353			11.41	1,098,914	(22,712)
Nurse Salary	0.15	16,290	0.50	50,051			0.35	35,036			1.00	101,377	38,559
Subtotal	0.15	16,290	0.50	50,051			0.35	35,036			1.00	101,377	38,559
<b>Instructional Assistants</b>													
Preschool Teaching Assistant - COTA											-	-	-
New Position - Program Specialist (Trxfr from SLC)											-	-	-
Summer Staff											-	-	-
Preschool Teaching Assistants - Summer		28,627									-	28,627	(1,263)
Preschool Teaching Assistant							0.86	29,103			0.86	29,103	-
Preschool Teaching Assistant							0.86	29,103			0.86	29,103	-
Preschool Teaching Assistant	0.14	4,759					0.59	19,899			0.73	24,658	1
Preschool Teaching Assistant			0.29	7,377	0.45	11,519			-		0.74	18,896	(5,462)
Preschool Teaching Assistant	0.06	1,550					0.74	20,671			0.80	22,221	-
Preschool Teaching Assistant	0.15	4,596	0.70	20,937							0.85	25,533	-
Preschool Teaching Assistant	0.15	3,930			0.70	17,902					0.85	21,832	21,832
Preschool Teaching Assistant	0.61	19,385			0.24	6,148					0.85	25,533	1,923
Preschool Teaching Assistant	0.85	21,832									0.85	21,832	(3,701)
Preschool Teaching Assistant	0.85	25,533									0.85	25,533	1,923
Preschool Teaching Assistant			0.86	29,353							0.86	29,353	250
Preschool Teaching Assistant	0.85	23,610									0.85	23,610	-
Preschool Teaching Assistant	0.80	26,973									0.80	26,973	200
Preschool Teaching Assistant	0.74	24,657									0.74	24,657	-
Preschool Teaching Assistant	0.40	18,781									0.40	18,781	23
Preschool Teaching Assistant			0.80	26,973							0.80	26,973	-
Preschool Teaching Assistant	0.85	27,968									0.85	27,968	-
Preschool Teaching Assistant							0.79	26,738			0.79	26,738	-
Preschool Teaching Assistant	0.74	22,100									0.74	22,100	-
Preschool Teaching Assistant											-	-	(26,948)
Preschool Teaching Assistant											-	-	-
Preschool Teaching Assistant	0.85	21,832									0.85	21,832	(6,586)
Preschool Teaching Assistant											-	-	-
Preschool Teaching Assistant	-	-									-	-	-



# FY20 Preschool Projection

FY20 Projected Preschool Combined Program E	FY20 PROJ FTE	FY20 PROJ Operating	FY20 PROJ FTE	FY20 PROJ Revolving	FY20 PROJ FTE	FY20 PROJ EC Grant	FY20 PROJ FTE	FY20 PROJ 94-142	FY20 PROJ FTE	FY20 CAPITAL PROJ CIP	FY20 PROJ FTE	FY20 PROJ Total \$	\$ Inc FY20 Proj Over FY20 Bud
Subtotal	8.04	276,133	2.65	84,640	1.39	35,569	3.84	125,514	-	-	15.92	521,856	(17,808)
Preschool Secretary	0.20	8,593	0.80	34,370	-	-	-	-	-	-	1.00	42,963	(4,216)
Subtotal	0.20	8,593	0.80	34,370	-	-	-	-	-	-	1.00	42,963	(4,216)
MTRS Retirement Expense @ 9%	-	-	-	-	-	-	-	9,755	-	-	-	9,755	1,236
Subtotal	-	-	-	-	-	-	-	9,755	-	-	-	9,755	1,236
<b>Non-Salary Expenses</b>													
Educational Supplies		4,000		7,399						-	-	11,399	(6,901)
Educational Supplies - Private School (STJ)				-		773				-	-	773	153
Textbooks/ Instructional Materials				-						-	-	-	-
Capital Outlay - Sunshade				40,000						69,200	-	109,200	-
Mileage/ In-State				600						-	-	600	600
Other Expenses		724		50						-	-	774	774
Office Supplies				2,000						-	-	2,000	(1,900)
Professional Development Conferences		1,785		-						-	-	1,785	585
Reference Materials		533		-						-	-	533	(467)
Other Services		75		13,180						-	-	13,255	(1,145)
Instructional Technology		500		-						-	-	500	(1,050)
Instructional Software		685		-						-	-	685	685
Testing Supplies		1,000		-						-	-	1,000	(200)
Instructional Equipment		3,650		-						-	-	3,650	3,650
Memberships		-		800		-	-	-	-	-	-	800	(100)
		12,952		64,029		-	773	-	-	-	-	146,954	(5,316)
<b>TOTAL EXPENSES</b>	<b>17.59</b>	<b>1,219,380</b>	<b>5.20</b>	<b>353,238</b>	<b>1.39</b>	<b>36,342</b>	<b>5.16</b>	<b>243,658</b>	<b>-</b>	<b>69,200</b>	<b>29.33</b>	<b>1,921,818</b>	<b>(10,258)</b>
<b>UNDER/(OVER) AVAIL REV</b>		<b>46,987</b>		<b>84,884</b>		<b>-</b>		<b>-</b>		<b>-</b>		<b>131,871</b>	

Current Rev	329,666
Current Expense	353,238
Current Surplus/(Deficit)	(23,572)
Target Fund Balance (3 Mo)	105,971
Unreserved Over/(Under) Target Fund Balance	(21,087)

# FY20 Preschool Budget

FY20 Preschool Combined Program Budget	FY20 BUDGET FTE	FY20 BUDGET Operating	FY20 BUDGET FTE	FY20 BUDGET Revolving	FY20 BUDGET FTE	FY20 BUDGET EC Grant	FY20 BUDGET FTE	FY20 BUDGET 94-142	FY20 BUDGET FTE	FY20 CAPITAL BUDGET CIP	FY20 BUDGET FTE	FY20 BUDGET Total \$	\$ Inc FY20 Bud Over FY19 Act
<b>Beginning Carry-Over Balance</b>													
Undesignated Carry-Over (Surplus from Operations)				108,296								108,296	20,031
Precollected Fees (Next Fiscal Year)		-		-		-	-	-	-	-	-	-	-
<b>BEGINNING CARRY OVER</b>		-		108,296		-	-	-	-	-	-	108,296	20,031
<b>Current Revenue</b>													
Operating Budget - Staff Salary		1,180,284										1,180,284	13,843
Operating Budget - Non-Salary		7,250										7,250	(2,453)
Operating - Summer Services Salary		57,865										57,865	1,134
Grant Revenue		-				37,045		228,691		-	-	265,736	(3,317)
Fee Revenues - Precollected Prior Year		-		129,184								129,184	129,184
Fee Revenues - Current Year		-		207,490								207,490	(126,833)
Capital Outlay - CIP Revenues		-		-		-	-	-		69,200		69,200	69,200
<b>TOTAL CURRENT REVENUE</b>		1,245,399		336,674		37,045		228,691		69,200		1,917,009	80,758
<b>Current Expense</b>													
<b>Certified Instructional Staff</b>													
Summer Teacher Salary		27,976										27,976	549
Professional Dev. Coaches												-	-
NA												-	-
Preschool Teacher	0.50	34,607	0.50	34,607								69,214	4,636
Preschool Teacher	1.00	69,214										69,214	4,484
Preschool Teacher	0.28	25,490					0.32	28,744				54,234	9,216
Preschool Teacher	1.00	105,617										105,617	1,891
Preschool Teacher	1.00	105,889										105,889	423
Preschool Teacher	0.55	53,690					0.45	43,929		-	-	97,619	6,512
Preschool Teacher/ BCBA	1.00	96,092					-	-				96,092	1,745
Preschool Teacher/ BCBA Per Diem		12,602										12,602	6,552
Preschool Teacher	1.00	105,889										105,889	1,923
Preschool Teacher												-	(6,720)
Preschool Teacher/ SLP	0.75	68,049	0.25	22,683								90,732	3,062
Preschool Director	0.50	63,055	0.50	63,055								126,110	(12,229)
Preschool Teacher/ OT	0.91	87,856										87,856	2,000
Preschool Teacher/ OT	0.70	72,582										72,582	2,716
Subtotal	9.19	928,608	1.25	120,345			0.77	72,673		-	-	1,121,626	26,759
Nurse Salary	0.15	9,423	0.50	31,409			0.35	21,986		-	-	62,818	(34,898)
Subtotal	0.15	9,423	0.50	31,409			0.35	21,986		-	-	62,818	(34,898)
<b>Instructional Assistants</b>													
Preschool Teaching Assistant - COTA												-	-
New Position - Program Specialist (Trxfr from SLC)												-	-
Summer Staff												-	-
Preschool Teaching Assistants - Summer		29,889										29,889	586
Preschool Teaching Assistant							0.86	29,103				29,103	2,713
Preschool Teaching Assistant							0.86	29,103				29,103	2,463
Preschool Teaching Assistant	0.14	4,759					0.59	19,898				24,657	1,853
Preschool Teaching Assistant			0.32	10,030		0.45	14,328					24,358	3,693
Preschool Teaching Assistant	0.06	1,550					0.74	20,671				22,221	528
Preschool Teaching Assistant	0.15	4,596	0.70	20,937								25,533	2,247
Preschool Teaching Assistant												-	(8,863)
Preschool Teaching Assistant	0.85	23,610										23,610	2,587
Preschool Teaching Assistant	0.85	25,533										25,533	2,288
Preschool Teaching Assistant	0.85	23,610										23,610	2,085
Preschool Teaching Assistant			0.86	29,103								29,103	303
Preschool Teaching Assistant	0.85	23,610										23,610	6,644
Preschool Teaching Assistant	0.80	26,773										26,773	234
Preschool Teaching Assistant	0.74	24,657										24,657	382
Preschool Teaching Assistant	0.40	18,758										18,758	1,618
Preschool Teaching Assistant			0.80	26,973								26,973	388
Preschool Teaching Assistant	0.85	27,968										27,968	364
Preschool Teaching Assistant							0.79	26,738				26,738	(3,539)
Preschool Teaching Assistant	0.74	22,100										22,100	2,013
Preschool Teaching Assistant	0.15	4,851				0.70	22,097					26,948	1,241
Preschool Teaching Assistant												-	-
Preschool Teaching Assistant	0.85	28,418										28,418	840
Preschool Teaching Assistant												-	-
Preschool Teaching Assistant												-	-

# FY20 Preschool Budget

FY20 Preschool Combined Program Budget	FY20 BUDGET FTE	FY20 BUDGET Operating	FY20 BUDGET FTE	FY20 BUDGET Revolving	FY20 BUDGET FTE	FY20 BUDGET EC Grant	FY20 BUDGET FTE	FY20 BUDGET 94-142	FY20 BUDGET FTE	FY20 CAPITAL BUDGET CIP	FY20 BUDGET FTE	FY20 BUDGET Total \$	\$ Inc FY20 Bud Over FY19 Act
Subtotal	8.28	290,682	2.68	87,043	1.15	36,425	3.84	125,513	-	-	15.95	539,663	22,667
Preschool Secretary	0.20	9,436	0.80	37,743	-	-	-	-	-	-	1.00	47,179	5,806
Subtotal	0.20	9,436	0.80	37,743	-	-	-	-	-	-	1.00	47,179	5,806
MTRS Retirement Expense @ 9%	-	-	-	-	-	-	-	8,519	-	-	-	8,519	(358)
Subtotal	-	-	-	-	-	-	-	8,519	-	-	-	8,519	(358)
<b>Non-Salary Expenses</b>													
Educational Supplies		4,000		14,300						-	-	18,300	7,114
Educational Supplies - Private School (STJ)				-		620					-	620	17
Textbooks/ Instructional Materials				-							-	-	-
Capital Outlay - Sunshade				40,000						69,200		109,200	109,200
Mileage/ In-State											-	-	(195)
Other Expenses				-							-	-	(983)
Office Supplies				3,900							-	3,900	1,386
Professional Development Conferences				1,200							-	1,200	(573)
Reference Materials		500		500							-	1,000	606
Other Services		-		14,400							-	14,400	85
Instructional Technology		1,550		-							-	1,550	1,197
Instructional Software		-		-							-	-	(110)
Testing Supplies		1,200		-							-	1,200	403
Instructional Equipment				-							-	-	(3,650)
Memberships		-		900		-	-	-	-	-	-	900	120
		7,250		75,200		-	620	-	-	69,200	-	152,270	114,617
<b>TOTAL EXPENSES</b>	<b>17.82</b>	<b>1,245,399</b>	<b>5.23</b>	<b>351,740</b>	<b>1.15</b>	<b>37,045</b>	<b>4.96</b>	<b>228,691</b>	<b>-</b>	<b>69,200</b>	<b>29.16</b>	<b>1,932,075</b>	<b>134,592</b>
<b>UNDER/(OVER) AVAIL REV</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>93,230</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>93,230</b>	<b>-</b>

Current Rev	336,674
Current Expense	351,740
Current Surplus/(Deficit)	(15,066)
Target Fund Balance (3 Mo)	105,522
Unreserved Over/(Under) Target Fund Balance	(12,292)

# FY19 Preschool Actual

FY19 Actual Preschool Combined Program Buc	FY19 Actual FTE	FY19 Actual Operating	FY19 Actual FTE	FY19 Actual Revolving	FY19 Actual FTE	FY19 Actual EC Grant	FY19 Actual FTE	FY19 Actual 94-142	FY19 Actual FTE	FY19 Actual Total \$
<b><u>Beginning Carry-Over Balance</u></b>										
Undesignated Carry-Over (Surplus from Operations)				88,265					-	88,265
Precollected Fees (Next Fiscal Year)		-		-	-	-	-	-	-	-
<b>BEGINNING CARRY OVER</b>	-		<b>88,265</b>		-	-	-	-	-	<b>88,265</b>
<b><u>Current Revenue</u></b>										
Operating Budget - Staff Salary		1,166,441							-	1,166,441
Operating Budget - Non-Salary		9,703							-	9,703
Operating - Summer Services Salary		56,731							-	56,731
Grant Revenue		-				35,254		233,799	-	269,053
Fee Revenues - Precollected Prior Year		-		-					-	-
Fee Revenues - Current Year		-		334,323					-	334,323
Fee Revenues - Precollected (Next FY)		-		-	-	-	-	-	-	-
<b>TOTAL CURRENT REVENUE</b>	<b>1,232,875</b>		<b>334,323</b>		<b>-</b>	<b>35,254</b>	<b>-</b>	<b>233,799</b>	<b>-</b>	<b>1,836,251</b>
<b><u>Current Expense</u></b>										
<b><u>Certified Instructional Staff</u></b>										
Summer Teacher Salary		27,427							-	-
Professional Dev. Coaches									-	27,427
NA									-	-
Preschool Teacher	0.50	32,289	0.50	32,289					1.00	64,578
Preschool Teacher	1.00	64,730							1.00	64,730
Preschool Teacher	0.28	19,339					0.32	25,679	0.60	45,018
Preschool Teacher	1.00	103,726							1.00	103,726
Preschool Teacher	1.00	105,466							1.00	105,466
Preschool Teacher	0.55	52,346			-	-	0.45	38,761	1.00	91,107
Preschool Teacher/ BCBA	1.00	94,347					-	-	1.00	94,347
Preschool Teacher/ BCBA Per Diem		6,050							-	6,050
Preschool Teacher	1.00	103,966							1.00	103,966
Preschool Teacher		3,158					-	3,562	-	6,720
Preschool Teacher/ SLP	0.75	65,495	0.25	22,176					1.00	87,670
Preschool Director	0.50	69,169	0.50	69,170					1.00	138,339
Preschool Teacher/ OT	0.91	85,856							0.91	85,856
Preschool Teacher/ OT	0.70	69,866	-	-			-	-	0.70	69,866
Subtotal	9.19	903,231	1.25	123,634	-	-	0.77	68,002	11.21	1,094,867
Preschool Nurse	0.15	14,657	0.50	48,858	-	-	0.35	34,200	1.00	97,716
Subtotal	0.15	14,657	0.50	48,858	-	-	0.35	34,200	1.00	97,716
<b><u>Instructional Assistants</u></b>										
Preschool Teaching Assistant - COTA									-	-
New Position - Program Specialist (Trxfr from SLC)									-	-
Summer Staff					-	-			-	-
Preschool Teaching Assistants - Summer		29,303							-	29,303
Preschool Teaching Assistant							0.86	26,390	0.86	26,390
Preschool Teaching Assistant							0.86	26,640	0.86	26,640
Preschool Teaching Assistant	0.14	4,644					0.59	18,160	0.73	22,804
Preschool Teaching Assistant			0.32	9,196	0.45	11,469			0.77	20,665
Preschool Teaching Assistant	0.01	442					0.80	21,251	0.81	21,693

# FY19 Preschool Actual

FY19 Actual Preschool Combined Program Buc	FY19 Actual FTE	FY19 Actual Operating	FY19 Actual FTE	FY19 Actual Revolving	FY19 Actual FTE	FY19 Actual EC Grant	FY19 Actual FTE	FY19 Actual 94-142	FY19 Actual FTE	FY19 Actual Total \$
Preschool Teaching Assistant	0.15	4,194	0.70	19,092					0.85	23,286
Preschool Teaching Assistant	1.00	8,863							1.00	8,863
Preschool Teaching Assistant	0.85	21,023							0.85	21,023
Preschool Teaching Assistant	0.85	23,245							0.85	23,245
Preschool Teaching Assistant	0.85	21,525							0.85	21,525
Preschool Teaching Assistant			0.86	28,800					0.86	28,800
Preschool Teaching Assistant	0.85	16,966							0.85	16,966
Preschool Teaching Assistant	0.80	26,539							0.80	26,539
Preschool Teaching Assistant	0.74	24,275							0.74	24,275
Preschool Teaching Assistant	0.40	17,140							0.40	17,140
Preschool Teaching Assistant			0.80	26,585					0.80	26,585
Preschool Teaching Assistant	0.85	27,604							0.85	27,604
Preschool Teaching Assistant							0.79	30,277	0.79	30,277
Preschool Teaching Assistant	0.74	20,087							0.74	20,087
Preschool Teaching Assistant	0.15	2,541			0.70	23,166			0.85	25,707
Preschool Teaching Assistant									-	-
Preschool Teaching Assistant	0.85	27,578							0.85	27,578
Preschool Teaching Assistant									-	-
Preschool Teaching Assistant	-	-	-	-	-	-	-	-	-	-
Subtotal	9.23	275,969	2.68	83,673	1.15	34,635	3.90	122,719	16.96	516,996
Preschool Secretary	0.20	8,418	0.80	32,955	-	-	-	-	1.00	41,373
Subtotal	0.20	8,418	0.80	32,955	-	-	-	-	1.00	41,373
MTRS Retirement Expense @ 9%	-	-		-	-	-	-	8,878	-	8,878
Subtotal	-	-		-	-	-	-	8,878	-	8,878
<b>Non-Salary Expenses</b>										
Educational Supplies		4,288		6,882		16			-	11,186
Educational Supplies - Private School (STJ)						603			-	603
Textbooks/ Instructional Materials									-	-
Capital Outlay - Sunshade									-	-
Mileage/ In-State				195					-	195
Other Expenses		983							-	983
Office Supplies				2,514					-	2,514
Professional Development Conferences		1,448		325					-	1,773
Reference Materials		394		-					-	394
Other Services		-		14,315					-	14,315
Instructional Technology		353		-					-	353
Instructional Software		110							-	110
Testing Supplies		797							-	797
Instructional Equipment		3,650							-	3,650
Memberships		-		780	-	-	-	-	-	780
		12,024		25,010	-	619	-	-	-	37,653
<b>TOTAL EXPENSES</b>	<b>18.77</b>	<b>1,214,299</b>	<b>5.23</b>	<b>314,131</b>	<b>1.15</b>	<b>35,254</b>	<b>5.02</b>	<b>233,799</b>	<b>30.17</b>	<b>1,797,483</b>
<b>UNDER/(OVER) AVAIL REV</b>		<b>18,577</b>		<b>108,456</b>		<b>0</b>		<b>-</b>		<b>127,033</b>

Current Rev      334,323  
 Current Expense      314,131  
 Current Surplus/(Deficit)      20,192

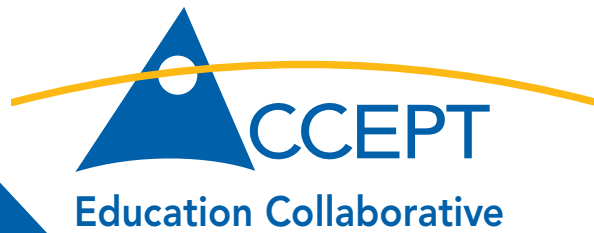
FY19 Ending Fund Balance Revolving	108,456
Reserve for Capital Outlay - Sunshade	(40,000)
<b>FY19 Ending Unreserved Fund Balance Revolving</b>	<b>68,456</b>

# FY19 Preschool Actual

FY19 Actual Preschool Combined Program Buc	FY19	FY19	FY19	FY19	FY19	FY19	FY19	FY19	FY19	FY19
	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual
	FTE	Operating	FTE	Revolving	FTE	EC Grant	FTE	94-142	FTE	Total \$

Target Fund Balance (3 Mo)	94,239
Unreserved Over/(Under) Target Fund Balance	(25,783)





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2018-2019



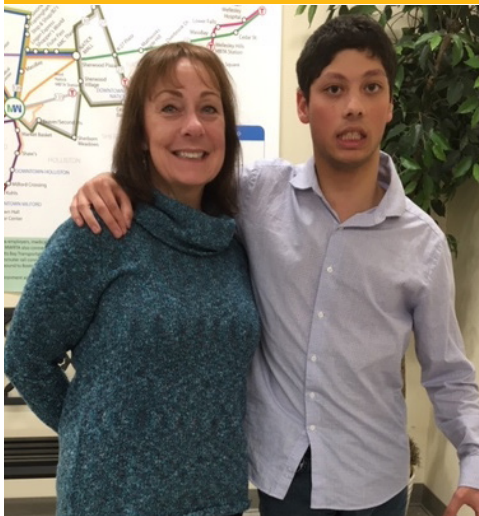
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# ANNUAL REPORT

# Message from the Executive Director and Board Chair



## What is the ACCEPT Advantage?

The ACCEPT Advantage means exceptional services for students with support from an entire community of teachers, teaching assistants, administrators, drivers, monitors, therapists, nurses, districts, and families invested in the success of all students.

*"The ACCEPT Advantage means students benefit from a professional staff, favorable student to teacher ratio, a wide variety of programs, and individualized learning."*

- ACCEPT staff



Dear ACCEPT Education Collaborative Community,

Helen Keller once said, "Alone we do so little; together we can do so much." What a pleasure it is to be part of an organization that indeed comes together and works in earnest, with heart, passion, and a genuine commitment to educating every child who walks through our doors. It is with great enthusiasm that we embark on this journey with so many wonderful professionals and families to serve the students and districts of the ACCEPT family.

One big change for the Collaborative this past year was the retirement of former Executive Director Marcia Berkowitz. Marcia served the Collaborative as the Direct of Student Services followed by 5 years as the Executive Director. We would like to thank her for service and dedication to our students, families, staff, and districts. ACCEPT Collaborative has been very fortunate that in its 46-year history, the Executive Directors have continued to grow the collaborative and bring exceptional services to its students and families. In 2019, Donna Flaherty begins her term as the 5<sup>th</sup> Executive Director. This is a testament to the strong passion the ACCEPT staff has for its students.

During the 2018-2019 school year, the Strategic Priorities were a continued focus for the Collaborative. Human Resource Systems - improved on-boarding for staff, understanding of the supervision and evaluation system and team building activities. Information Systems - enhanced in-house IT capacity, expanded support for student and teacher use of technologies and increased use of 1:1 Chromebooks. Metrics and Dashboards - use of data as a means of assessing continuous improvement, staff engagement surveys and parents surveyed about programs. Space - full utilization of Center for Learning and Growth exceeding expectations and accommodating growth, enhanced safety protocols and training in place, expanded programming and expanded user of Professional Development spaces. The great work continues!

Thank you for your contribution to our work at ACCEPT Collaborative. It is because of your commitment to children that ACCEPT Collaborative continues to grow and adapt to the many needs of the people it serves. We look forward to continuing our partnership as we continue to work to improve the lives of our students.

Warmest Regards,

A handwritten signature in black ink, appearing to read "James Adams".

**James Adams**  
Chair, Board of Directors,  
ACCEPT Collaborative  
Superintendent, Ashland Public Schools

A handwritten signature in black ink, appearing to read "Donna Flaherty, Ed.D.". The signature is written in a cursive style.

**Dr. Donna Flaherty**  
Executive Director,  
ACCEPT Collaborative

# ABOUT ACCEP EDUCATION COLLABORATIVE

# ANNUAL REPORT

Since 1974, ACCEP has provided excellence and innovation in educational practice for school districts in Metrowest Boston.

Working collaboratively, ACCEP offers opportunities for districts to stretch dollars and better meet the needs of students. This allows districts to maximize their investments in learning and growth. Flexible and adaptable, ACCEP quickly responds to the individual needs of member districts with new programs and services. ACCEP is supported primarily by fee-for-service activities, with an annual operating budget of almost \$18.6 million.

In 2018-2019 ACCEP marked its 45th year of serving students, families, and districts in the Metrowest area. Over the years, ACCEP has evolved and grown in educational programs and transportation services, as well as professional development, school consultation, program and student evaluations, home-based services, Medicaid reimbursement, and more.

## OUR 45TH ANNIVERSARY YEAR

**1974** – In response to new legislation encouraging the establishment of collaboratives as a way to provide more specialized and cost-effective services to clusters of school districts, particularly in the areas of special education, ten Metrowest districts founded ACCEP. Mike Palladino, as the first Executive Director, charted a course for ACCEP's initial focus, and gradually added services, including transportation, in response to student and district needs.

**2007**– Susan Rees, appointed Executive Director after serving as ACCEP's Director of Professional Development, continued to grow the reach and reputation of ACCEP with the development of robust professional development offerings, and a state-wide Institute for Special Education Directors new to their roles in partnership with Massachusetts Department of Elementary and Secondary Education (DESE).

**2014** – After serving as ACCEP's Director of Student Services, Marcia Berkowitz was appointed as ACCEP's fourth Executive Director, increasing the number of member districts, students enrolled, and program offerings. ACCEP opened the Center for Learning and Growth, providing a home for ACCEP's elementary and transition programs, professional development, transportation, and administrative offices.

## HONORING MARCIA BERKOWITZ

Marcia Berkowitz, Executive Director at ACCEP since 2014, retired in June, 2019. The entire ACCEP community honored Marcia at an end-of-year celebration. Superintendent Dan Gutekanst, Chair of ACCEP, stated, "During Marcia's tenure she advocated for and envisioned an ACCEP with its own permanent homebase and distinctive branding, guided by a strategic plan focused on partnerships, programs and services, always with a focus on students and their growth and potential."

An official citation from Governor Charlie Baker was presented to Marcia which read, "In recognition of your 39 years of honorable and exemplary service in your career as an educator, administrator, and mentor to your students and colleagues in the Commonwealth of Massachusetts."

On behalf of ACCEP Staff, Anne Donovan, School Consultation and Evaluation Services Director, said, "Over the years, your vision has forever shaped our entire organization with expanded programs and even a brand new school. When we walked through the new school building in hard hats, looking at nothing but empty space and heaps of concrete we all wondered how it would become a school. Yet here we are today, in an incredible state-of-the-art learning environment. Thank you for being passionate about our mission, thank you for always inspiring us to be the best we can be, and thank you for opening so many opportunities for everyone in the Collaborative."

A number of students spoke as well; one said it best, "you greeted me, you knew my name, you asked how I was doing - I knew I belonged here and you made ACCEP a safe place for me to make friends and learn."





# ANNUAL REPORT

## What are Collaboratives?

Massachusetts collaboratives are educational services agencies that bring school districts together to form partnerships that create regional educational resources. Collaboratives benefit districts, students, families, educators, and taxpayers by maximizing efficiency through shared costs and expertise; play a leadership role in developing a broad range of innovative programming to meet emerging needs; provide training; enable the sharing of exemplary educational practices; and serve and educate directly many of our most vulnerable students across the Commonwealth. In 1974 Massachusetts legislation originally addressed demands for special education services. Since then, the 28 educational collaboratives statewide have grown to encompass a range of educational services and programs. (*Massachusetts Organization of Educational Collaboratives, 2016*).



# GOVERNANCE



The ACCEPT Education Collaborative is governed by a Board of Directors comprised of the 16 superintendents of the member school districts. Member district staff who serve on the Special Education, Curriculum, Technology, and Business Operations committees make recommendations to the Executive Director relative to program development and service delivery (see page 26). ACCEPT is organized according to Massachusetts General Law Chapter 40, Section 4e.

### Board of Directors

### Member Districts

Daniel Gutekanst, Chair	Superintendent, Needham Public Schools
James Adams, Vice-Chair	Superintendent, Ashland Public Schools
Andrew Keough	Superintendent, Dover-Sherborn Regional School District
Robert Tremblay	Superintendent, Framingham Public Schools
Sara Ahern	Superintendent, Franklin Public Schools
Bradford Jackson	Superintendent, Holliston Public Schools
Carol Cavanaugh	Superintendent, Hopkinton Public Schools
Jeffrey Marsden	Superintendent, Medfield Public Schools
Armand Pires	Superintendent, Medway Public Schools
Nancy Gustafson	Superintendent, Millis Public Schools
Anna Nolin	Superintendent, Natick Public Schools
Jonathan Evans	Superintendent, South Middlesex Regional Vocational Technical School District
Brad Cozier	Superintendent, Sudbury Public Schools
David Lussier	Superintendent, Wellesley Public Schools

# STRATEGIC FRAMEWORK



## OUR MISSION

To use the collective power of member school districts to provide programs and services that maximize the potential of students, their families, educators, and communities.

- We anticipate and respond to evolving educational needs with innovative, forward-thinking, high-quality, best-in-class programs and services.
- We complement and extend in-district options by leveraging our expertise, utilizing economies of scale, and building strength through collaboration.

## OUR STRATEGIC PRIORITIES

The 2018-2019 school year was the third year of our strategic plan implementation. The plan guided our initiatives for growth and inspired a strategic mindset that guides how we look at data, assess opportunities, work smart, and adapt to the changing needs of our students and families. We continue to focus on the priorities that will have the greatest impact on the strength and future of the Collaborative, and particularly the quality of programs for students and families.

Our plan, adopted in 2015-2016, identifies three strategic priorities:

1. Building infrastructure to support growth;
2. Communicating the ACCEPT Advantage; and
3. Expanding programs, specialized expertise, and services. A brief overview of our progress for each priority area, as well as highlights of accomplishments during the 2018-2019 school year, is provided below.

# ANNUAL REPORT

## ACCEPT Guiding Principles

- Respect for diversity and human differences
- Best practices
- Continuous improvement
- Open and honest communication
- Integrity



“ It’s always validating and comforting to know that I’m not alone and I have a community of colleagues I can lean on and learn from. ”

- Special Education Director



# ANNUAL REPORT

# STRATEGIC PROGRESS IN ACHIEVING PURPOSE

## HIGHLIGHTS & NEW OR CHANGED 2018-2019

### Strategic Priority 1: Focus on Building Infrastructure to Support Growth

Human Resource Systems	Information Systems	Metrics and Dashboards	Space
<ul style="list-style-type: none"><li>• Hire HR Professional</li><li>• Use Consultant recommendations to prepare work plan</li></ul>	<ul style="list-style-type: none"><li>• Complete assessment of current information systems</li></ul>	<ul style="list-style-type: none"><li>• Define success and quality for each program</li><li>• Define metrics to measure that success</li><li>• Pilot one easy-to-implement dashboard</li></ul>	<ul style="list-style-type: none"><li>• Locate a space that could ideally house all offices, programs, and professional development</li></ul>

### Accomplishments in 2018-2019

<ul style="list-style-type: none"><li>• Evaluation and training documentation and supports in place</li><li>• Onboarding systems adopted</li><li>• Employee how-to book developed</li><li>• Regular team building activities and communications established</li></ul>	<ul style="list-style-type: none"><li>• Enhanced in-house IT capacity</li><li>• Expanded internal support for student and teacher use of technologies</li><li>• Increased monitoring of student internet usage</li><li>• Go Guardian filtering of social media for self-harm alerts</li><li>• Expanded use of 1:1 Chromebooks</li><li>• Use of Chromebooks for MCAS testing</li></ul>	<ul style="list-style-type: none"><li>• Transportation data utilization formalized for continuous improvement and to build capacity</li><li>• Staff engagement surveys adopted</li><li>• ACCEPT Parent Special Education Program survey administered annually</li></ul>	<ul style="list-style-type: none"><li>• Full utilization of Center for Learning and Growth exceeding expectations and accommodating growth</li><li>• Enhanced safety protocols and training in place</li><li>• Expanded programming</li><li>• Expanded use of Professional Development spaces</li></ul>
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## NEW HUMAN RESOURCES AND INFORMATION TECHNOLOGY RESOURCES CAPACITY

Our first-ever Human Resources professional hit the ground running, addressing pressing needs including recruiting, hiring, and onboarding a number of new staff, while also building relationships across the organization. In addition, policies and procedures were refined, providing guidance and increasing compliance around employee relations issues, disciplinary procedures, and related topics. Through better onboarding, infusion of periodic teambuilding activities, and regular communications, staff report that they feel better supported and appreciated. In addition, through proactive acceleration of the evaluation process we were able to issue employment agreements for the next school year by mid-April, which reduced uncertainty, helped us retain great staff, and enhanced the positive climate.

## INFORMATION SYSTEMS

In-house IT capacity was enhanced by redeploying existing staff resources to support student and teacher use of technology, including implementing automated monitoring of student internet usage, particularly filtering of social media to detect potential areas of concern. We have also expanded use of Chromebooks such that nearly every student now has a dedicated device.

## SPACE SAFETY IMPROVEMENTS

ACCEPT adopted a comprehensive approach to school safety with key protocols and trainings. ACCEPT worked directly with Natick Police and Fire and adopted state-of-the-art school emergency protocols, followed by staff trainings, and age- and developmentally-appropriate trainings for students.

## Strategic Priority 2: Focus on Communicating the ACCEPT Advantage

The ACCEPT Story	Make Marketing Everyone's Job	Marketing Collateral
<ul style="list-style-type: none"> <li>• Define "The ACCEPT Advantage"</li> <li>• Work with all staff to explore ways to incorporate messaging into everyday work</li> </ul>	<ul style="list-style-type: none"> <li>• Build on high customer service culture and extend to marketing and communications</li> <li>• Promote cohesive, unified approach</li> </ul>	<ul style="list-style-type: none"> <li>• Review existing marketing materials through lens of The ACCEPT Advantage</li> <li>• Revise existing materials portfolio</li> </ul>
Accomplishments in 2018-2019		
<ul style="list-style-type: none"> <li>• Implemented recommendations from year-long marketing and communications project with CES, funded by Sudbury Foundation</li> <li>• Widespread use of new program names re-aligned for clarity PreK-22</li> </ul>	<ul style="list-style-type: none"> <li>• Reorganization of special ed leadership to include Special Ed Chairs for each level facilitates consistency and communication of the ACCEPT story</li> <li>• All parent and staff resources are now online</li> <li>• Website content linked to Google for automatic staff updating</li> </ul>	<ul style="list-style-type: none"> <li>• All new program brochures available online and continuously updated</li> <li>• New website launched - reflects new branding and provides a better user experience.</li> </ul>

## COMMUNICATIONS STRATEGY AND NEW WEBSITE

We were able to implement fully the recommendations of our FY18 Sudbury Foundation grant supporting a communications and marketing consultation from Collaborative for Education Services (CES). Based on our mindset shift across the organization about what we do, how we message it, why, and to what audiences, we reorganized our myriad specialized programs into three categories and re-defined our programs. A new website, new brochures for all program and service areas, and new handbooks followed.

## Strategic Priority 3: Focus on Expanding Programs, Specialized Expertise, &amp; Services

Special Education Programs	Educator Development	Services
<ul style="list-style-type: none"> <li>• Stay ahead of district and student needs, designing quality solutions that are agile and evolving</li> <li>• Acquire space to ensure stability and efficiency</li> </ul>	<ul style="list-style-type: none"> <li>• Expand online and blended learning options; expand job-alike groups</li> <li>• Further evaluate demand for Assistive Technology consultation</li> </ul>	<ul style="list-style-type: none"> <li>• Investigate expansion potential for Home-Based services</li> <li>• Gather data on health resource needs in districts, including mental health, trauma</li> <li>• Transportation - focus on continuous improvement and equity of availability of transportation services</li> <li>• Medicaid Reimbursement – determine current capacity for growth; market accordingly</li> </ul>
Accomplishments in 2018-2019		
<ul style="list-style-type: none"> <li>• Curriculum reviewed and realigned, PreK-22. Resources such as Lexia adopted for reading</li> <li>• Enhanced schedule for SafetyCare training</li> <li>• Coordinated Program Review (CPR), conducted by DESE, reinforced that our practices are in high compliance with Special Ed, Civil Rights and Public Day School requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Social Studies-themed series introduced district curriculum leaders to the new standards</li> <li>• Professional Practices Symposium for Public School BCBAs a monthly workshop series, led by ACCEPT with MA Association for Applied Behavior Analysis, involves 93 BCBAs from 40 districts</li> </ul>	<ul style="list-style-type: none"> <li>• Transportation infrastructure reorganized to support fleet maintenance, driver support and dispatch, and increased use of technologies to enhance routing</li> </ul>

## PROGRAM REORGANIZATION TO BETTER SERVE OUR STUDENTS

Another benefit of our year-long communications consultation was rethinking how we organize and describe our school programs. We now have three basic strands: Academic and Therapeutic; Academic and Life Skills; and new in 2017-18, Academic and Language-Based. The newly defined strands better represent the way our services are aligned across classrooms and allow us to be more agile in meeting student needs. (see p. 14 for descriptions of strands)

## NEW CURRICULUM COORDINATOR ROLE LEADS CURRICULUM REVIEW, REFRESH, AND REALIGNMENT

ACCEPT prides itself on individualized and customized curriculum options to meet the needs of every ACCEPT student. During the 2018-19 school year, we took a holistic look at the materials available, revisited our scope and sequence, linking it to state standards. We now have more cohesive and universal access to resources across classrooms, well aligned to the needs of our students and state standards.

## SPECIAL ED CURRICULAR ENHANCEMENTS

Our review of curriculum led to a few significant enhancements. Lexia was added as a platform for enhancing our reading instruction and it was used extensively in the elementary classrooms with Core5 Reading. Lexia with PowerUp helped our middle school students with gaps in fundamental literacy skills make progress toward becoming proficient readers. For mathematics K-8, MobyMax was utilized to supplement the teaching of math skills that are essential for math comprehension.

## ALL STAFF TRAINED IN SAFETY-CARE

All ACCEPT staff trained in the Safety-Care Behavioral Safety Training program during 2018-19, gaining the skills and competencies necessary to prevent, minimize, and manage behavioral challenges effectively, with dignity and safety. In addition, we now have on-staff trainers offering weekly trainings to ensure that all new staff receive the 12-hour initial training within weeks of being hired, with 6-hour refreshers for returning staff. The approach centers on de-escalation strategies. The ACCEPT trainer integrates the Collaborative's values and priorities, builds staff resiliency, and encourages staff to work together as a team to support each other and our students.

## COORDINATED PROGRAM REVIEW

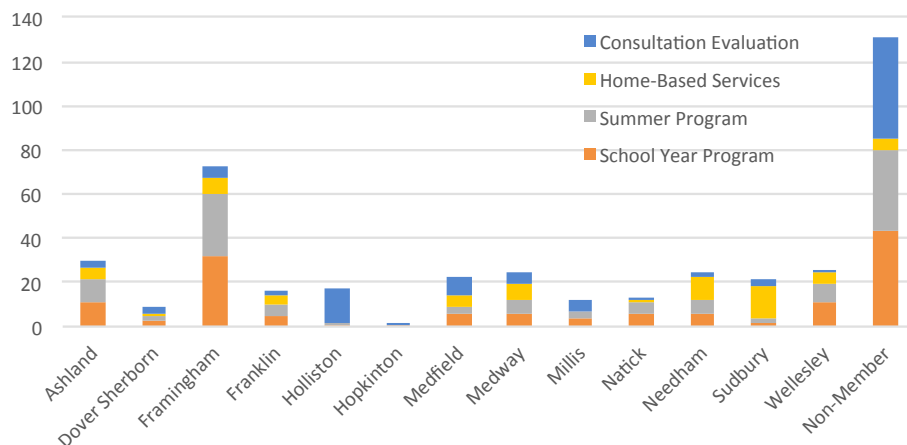
ACCEPT was recognized for high compliance and minor areas for improvement with special education, civil rights, and public day requirements via the every six-year Department of Elementary and Secondary Education (DESE) Coordinated Program Review. The first step, providing evidence of compliance, was followed by 40 staff interviews and observations, and review of 20 student files. A parent survey and parent phone interviews completed the review. The DESE team was very positive about their experiences in Natick and Medway and commented on the empathy and caring approach they witnessed from staff. Their overall impression was that the students were engaged academically, and they described staff as, "supportive, positive, knowledgeable, collaborative, (with) strong teams, love of students."

## TRANSPORTATION

Thanks to longer office hours and enhanced staff infrastructure we are better able to provide daily communication, adjustments to transportation schedules, and proactive fleet management, as requested by families and districts. Our recently hired Fleet Manager is already making a difference with increased monitoring of fleet usage and overseeing preventive maintenance and necessary repairs. Our new Driver Supervisor/Dispatcher provides increased driver and monitor training and support.

Going forward, the decision of our largest district to move their transportation services to an outside vendor will have a substantial financial impact on the remaining districts that utilize our transportation services as the costs of transportation infrastructure will be divided by fewer transportation seats. We will monitor the changes and seek efficiencies that maintain high quality service while also reducing costs where possible.

Number of Students Served by Program and by District - FY19



## PARTNERSHIPS FOR LEARNING

**Bailey's Team for Autism and Middlesex Savings Charitable Foundation** supported "Blended Online Life: Learning, Working and Playing" and the purchase of Chromebooks to allow students in our transition programs the food handling and tracking of lunch payments and meals delivered.

Thanks to the many generous organizations, businesses, and individuals in the Metrowest area, and the opportunities presented by our new physical space, ACCEPT benefited from several exceptional partnerships in 2018-19.

**Natick Public Schools Food Service** provided students at the Center for Learning and Growth breakfast and a hot lunch daily. Natick Food Service delivers the meals, and students in our transition programs learn food service vocational skills including customer service, maintaining high standards for food handling and tracking of lunch payments and meals delivered.

**Medway Public Schools**, for the second year, has warmly welcomed ACCEPT staff and students at Medway's elementary, middle, and high schools. Thanks to Medway's collaboration, all inclusion programs are now consolidated in Medway.

**Parents, colleagues, and friends** honored staff by contributing funds to enrichment activities for students. Staff appreciated the contributions as an alternative to teacher gifts.

**Crocodile River Music**, supported by our enrichment funds initiative and Crocodile River funders, brought African drumming and dance to the Center for Learning and Growth for a full day of workshops culminating in a fantastic performance that brought our students to their feet with a celebration of dance and rhythm.

**Summer Star Wildlife Sanctuary**, located in Boylston, MA, hosted ESY students at their 45-acres of wildlife and trails, and the inspirational and educational green-built Trailhead House. Founder Shalin Liu visited students

## By the Numbers Students Served

**137** students educated in school-based programs

**116** students benefited from Extended School Year (summer) programs

**72** students/families received home-based services

**582** students transported

**441** students enrolled in **774** ACCEPT/Virtual High School (VHS) classes

## Districts Served

**157** districts, regional schools, charter schools, and parochial schools utilized ACCEPT's programs, educator development, and services





“ My favorite thing about ACCEPT is the opportunities that are available for all of our students, of all ages!! ”

- ACCEPT Staff Member



before their visit, getting to know them and their interests, and sharing the story of Summer Star's wild land protection and the inspiration from nature that Summer Star represents. Students were also treated to delicious treats, musical performances, and art exhibits.

**Bushell Piano Movers** donated a Kimball upright piano, fully refurbished. **Annalia Aviza** donated a Yamaha acoustic guitar. Students have already enjoyed sing-alongs thanks to their generosity.

**Wegmans** provided funds for a Thanksgiving Feast in every classroom. Teacher teams used the opportunity for educational, developmentally appropriate activities, as well as a fun social celebratory event.

**Casual for a Cause** has become a tradition at ACCEPT, raising funds and awareness for several causes, organizations, and efforts aligned with our mission. During the school year we dedicated several days to "Casual for a Cause," encouraging staff to wear jeans or otherwise dress down in exchange for a minimal financial donation. During the year ACCEPT donated a total of \$1,348 to Miles for Miracles, Massachusetts Down Syndrome Congress, various Autism organizations, the Epilepsy Foundation, and the ACCEPTional Enrichment Fund.

**Eversource and the Massachusetts Bankers Association**, along with numerous individuals who supported the fundraising, helped us purchase an ACCEPT fleece hoodie for every student at no cost to the Collaborative or our families. Students proudly wear their ACCEPT gear at school and in the community.

## PROGRESS IN ACHIEVING PURPOSE

Since its formation in 1974, ACCEPT has established trusted partnerships with districts to achieve its objectives and purposes set forth in its Collaborative Agreement. The following table highlights progress in 2018-2019.

Objectives outlined in collaborative agreement	Progress towards those objectives in 2018-2019
<b>ELEVATE STUDENT OUTCOMES</b> Deliver efficient, cost-effective, and high quality programs and services that minimize the impact of student disabilities and maximize student outcomes including achievement, independence, and participation in the community.	<ul style="list-style-type: none"> <li>• Co-teaching model utilizing a special educator and behavior specialist in ACCEPT programs (preK-8). The full-time approach strengthens the learning for students as behavioral strategies and proactive measures are fully embedded and practiced throughout the school day</li> <li>• Favorable staff to student ratios are at the heart of the ACCEPT model</li> <li>• All students earned "progressing" scores on their MCAS-Alt portfolios.</li> <li>• The end of each school year is celebrated by a moving-up and award ceremony</li> </ul>

Objectives outlined in collaborative agreement	Progress towards those objectives in 2018-2019
<p><b>RESPOND TO DISTRICT NEEDS WHERE COLLABORATION IS A SENSIBLE APPROACH</b> Develop and implement programs and an array of services that increase educational opportunities for students, families, educators, and districts when it is determined that such programs and services can most effectively, efficiently, and economically be provided on a collaborative basis and complement, strengthen, and meet the evolving needs of member districts.</p>	<ul style="list-style-type: none"> <li>• Completed a number of in-district program evaluations and provided consultations to build capacity to keep students in-district for member and non-member districts</li> <li>• Clarified and streamlined the admission process and posted it on our website</li> <li>• Provided highly skilled staff to conduct student evaluations for districts lacking necessary resources to conduct these evaluations.</li> <li>• Expanded expertise in the area of trauma-informed services</li> </ul>
<p><b>EXPAND PROGRAMS TO MEET NEW NEEDS</b> Expand program options in alignment with the mission and purpose of the Collaborative to help districts maximize cost-efficiency and program effectiveness through a collaborative effort.</p>	<ul style="list-style-type: none"> <li>• ACCEPT's collaborative approach to special education services saves districts money (see Value and Cost Comparisons pages 17)</li> <li>• Increased programming to include a language based strand for students pre-K to 22</li> <li>• Added a life skills program to our middle school offerings</li> <li>• Expanded school consultation services to include AAC consultation, psychological assessments, and general education program evaluations</li> </ul>
<p><b>TRANSPORT STUDENTS WITH DISABILITIES</b> Provide safe, reliable, and efficient transportation services for students with disabilities.</p>	<ul style="list-style-type: none"> <li>• 582 students transported to 122 locations</li> <li>• ACCEPT maintains a fleet of more than 120 vans providing flexibility and efficiency in dispatching drivers; ACCEPT continues to supplement capacity by contracting with local transportation companies</li> <li>• Expanded infrastructure to accommodate families and districts with longer hours office hours, monitor fleet usage and maintenance, provide driver/monitor increased training and support</li> <li>• Purchased 12 minivans and one transit van</li> </ul>
<p><b>OFFER PROFESSIONAL DEVELOPMENT FOR CONTENT, SKILLS, AND SHARING OF PRACTICE</b> Offer quality professional development opportunities to general and special education teachers, administrators, and related service providers, focused on closing achievement gaps, preventing unnecessary referrals to special education and personalizing learning for students.</p>	<ul style="list-style-type: none"> <li>• ACCEPT hosted job-alike groups for Special Education Directors, Business Managers, Curriculum Directors (adding a Social Studies series), pre-school coordinators, and elementary and high school special education coordinators</li> <li>• Expanded our BCBA job-alike with MA ABA co-facilitation</li> <li>• The 16th Annual Institute for new Special Education directors received excellent reviews again in Summer 2018 (see page 19)</li> </ul>

# ANNUAL REPORT

## By The Numbers

**137** students educated in school-based programs

**116** students benefited from Extended School Year summer programs



## Our Expert Staff Includes

- Master's level educators
- Reading specialists
- Board Certified Behavior Analysts
- School and clinical psychologists
- Psychiatrist for consultation
- Licensed Mental Health Counselors
- Licensed Social Workers
- Speech pathologists
- Occupational Therapists
- Physical Therapists
- Registered Behavior Technicians (RBT)

# SPECIAL EDUCATION PROGRAMS

## SPECIAL EDUCATION PROGRAMS

**Elementary School**

**Middle School**

**High School**

**Transition  
Ages 18-22**

**Extended School Year (summer)**

## ELEMENTARY SCHOOL, MIDDLE SCHOOL AND HIGH SCHOOL PROGRAMS

At ACCEPT, we work with parents and districts to design individualized, evidence-based programs for each student addressing academics, behavioral and therapeutic needs, life skills, and specialized services based on the IEP. The goal is to build strengths and self-confidence, and to maximize the potential for students in PreK, elementary, middle, and high school grades and beyond.

Our programs address autism spectrum disorders, emotional/behavioral needs, global impairments and medically involved disabilities, cognitive/intellectual disabilities, language disorders, ADHD/ADD, and nonverbal learning disability. ACCEPT programs are supported by a highly trained, specialized team of teachers and specialists, who are hired for their hearts and minds.

PROGRAM	TYPE OF DISABILITY
<b>Academic and Therapeutic</b>	Emotional, Autism, Neurological
<b>Academic and Life Skills</b>	Autism, Communication, Developmental Delay, Intellectual, Neurological, Health, Multiple Disabilities, Physical
<b>Academic and Language-Based</b>	Autism, Communication, Neurological, Specific Learning, Emotional, Health, Intellectual
<b>Transition</b>	Full range of disabilities

**At ACCEPT**, we work with parents and districts to design individualized, evidence-based programs for each student addressing academics, behavioral and therapeutic needs, life skills, and specialized services based on the IEP. The goal is to build strengths and self-confidence, and to maximize potential for students in elementary, middle, and high school grades.

Our programs address autism spectrum disorders, emotional/behavioral needs, global impairments and medically involved disabilities, cognitive/intellectual disabilities, language disorders, ADHD/ADD, and nonverbal learning disability. ACCEPT programs are supported by a highly trained, specialized team of teachers and specialists, who are hired for their hearts and for their minds.

### Academic and Therapeutic

The programs in the therapeutic strand bring together clinical, therapeutic, and behavioral services with rigorous academics, and supports to strengthen life skills. We use an integrated team model that seamlessly blends individualized clinical services within the practices and routines of the school day to help students learn the skills they need in the places they will use them, with more practice opportunities. Each student participates in all classroom activities, and teachers and therapists can focus on skills that are immediately useful leading to better generalization of the skills. The academic curriculum is challenging and engaging, aligned with Massachusetts Curriculum frameworks.

Individualized clinical services include:

- A therapeutic milieu providing consistent routines and clinical supports.
- Embedded group social skills instruction and counseling, individual counseling and clinical check-ins, and coping strategy practice.

### Academic and Life Skills

The programs in the life skills strand blend academics, daily living, personal/social and occupational skill development with behavioral and social supports in a highly individualized program, tailored to the student's unique profile, based on the IEP. This makes every day an opportunity for students to develop self-confidence, self-control, and the life skills to pursue their passions. The program is a great fit for students who have complex language and learning difficulties, have issues with behavior or coping, and need moderate to significant modification to the Massachusetts Curriculum Frameworks in order to make effective progress.

Features include:

- Academics and life skills curriculum tailored to the needs of each student.
- Consistent and predictable routines and structures, shared with families and home providers for adaptation to the home.
- Expected classroom and community behaviors that are communicated, practiced and reinforced throughout the day.
- Individual and small group explicit instruction, which may include Social Thinking techniques, video modeling and feedback, self-rating scales, and more.

### Academic and Language-Based

The programs in the Language-Based strand prepare students for a successful elementary school experience by addressing moderate language and

At the heart of our programs is an integrated team model that seamlessly blends functional academics, community experiences, social skills development, specialized services, vocational training, and independent living skills.

Programs are individualized depending upon each student's unique needs and may be a hybrid of one or more of the three strands at the left. All of ACCEPT's special education programs offer:

- Continuum of programs and services PreK-12 and to age 22
- Favorable teacher-to-student ratios
- Individual and group instruction
- High academic expectations
- Activity-based learning
- Specialized therapeutic supports
- A team of experts to provide positive behavioral interventions and supports
- Healthcare team of registered nurses that support the physical, behavioral and social health of our students
- Access to art, music, physical activities, health and wellness, technology, and pre-vocational learning
- Technology integrated into learning opportunities
- Ongoing district and family communication
- Extended year option



Thank you to the many organizations & businesses who provided vocational experiences & community outings.

- St. Joseph's Church – Medway
- Nick's Pizza – Ashland
- Natick Morse Institute Library
- Rocky Woods – Medfield
- Medfield Public Library
- Kindred (Gentiva) Hospice – Marlborough
- Blessing Barn – Milford
- Medfield Council on Aging
- Millis Library
- TC Scoops – Medway
- Ashland Pizza Palace
- Hopkinton Lumber
- MetroWest Wellness Center – Framingham
- MetroWest Medical Center – Framingham
- Sunrise Assisted Living – Wayland
- Needham High School Special Education Department
- Putts n' More – Holliston
- Hampton Inn – Natick
- Belmont Council on Aging
- Bethany House – Millis
- Milford Meals on Wheels
- Medway Senior Center
- Supreme Pizza – Medway
- Royal Pizza – Medfield
- MetroWest YMCA – Framingham
- American Cancer Society – Framingham
- MA Horticultural Society – Wellesley
- Framingham Hope Food Pantry
- Framingham Council on Aging
- Cross Service Group – Natick
- Drumlin Farm and Wildlife Sanctuary
- Belmont MassAudubon
- Medfield Animal Shelter
- TLC Cleaners – Medway
- Natick Pegasus Community TV Station
- Medfield TB Station
- Park Street Books and Toys -- Medfield

learning difficulties. Comprehensive academic, behavioral, and clinical service supports center on developing oral, social, and written language skills to enhance communication and comprehension of academic content. Each student's program is individualized and based on the IEP, with curriculum aligned with Massachusetts Curriculum Frameworks. Individual and small group instruction with low student-to-teacher ratios targets communication and social skills, academics, executive functioning skills and compensatory strategies to increase student independence.

### TRANSITION PROGRAMS – AGES 18-22

Transition programs prepare students for a successful passage to adult living. We view each student as the unique individual they are and, using their IEP and results from transition and vocational assessments, develop a personalized transition plan to maximize independence, vocational potential, participation in the community, and help students meet their postsecondary vision. At the heart of our transition programs is an integrated team model that seamlessly blends functional academics, community experiences, social skills development, specialized services, vocational training, and independent living skills.

## Celebrating Success – Our Students



At ACCEPT, the annual awards ceremony and frequent celebrations of success reinforce achievement and confidence-building. The Michael J. Palladino Award is presented to a student who has turned 22 and exemplifies the Collaborative's commitment to minimizing the impact of a disability and maximizing opportunities in the community.

The 2018-19 recipient is **Christos Brokalakis** from Framingham. CB, as he is known, came to ACCEPT's transition program in the fall of 2016 as a quiet, unsure young man and completed the program as a social and confident adult. He embraced new skills, shared his infectious sense of humor and led by example. Hardworking and open to trying new things, particularly vocational internships, he participated in 24 job and company tours and informational interviews, worked at Assumption College, and accepted a job with Staples in Natick as a Customer Service team member, where he still works. CB truly embodies the success we hope for all our students.

## Value and Cost Comparisons - School Year

Location	Type of program	Member Tuition	Non-Member Tuition	Member Savings	Average Private School Tuition	Average Savings Over Private School
ACCEPT Center for Learning and Growth or Medway Public Schools	Academic and Therapeutic	\$44,556	\$53,467	\$8,911	\$72,658	\$26,766
	Academic and Life Skills	\$44,556	\$53,467	\$8,911	\$93,070	\$47,178
	Academic and Language-Based	\$44,556	\$53,467	\$8,911	\$59,302	\$31,410
	Transition	\$46,612	\$55,934	\$9,322	\$81,687	\$35,075

## Celebrating Success – Our Teachers



*" Anne is the total package. She stays ahead of trends, is a leader in the field, manages this huge program seamlessly, and truly enjoys sharing her knowledge to mentor others and provide the best opportunities for staff and students alike. She's the model of growth mindset, with a great smile that makes everyone feel welcome and accepted. "*

*- ACCEPT Parent*

At the heart of ACCEPT and its quality programs are the professionals who, through training and experience, have the specialized expertise to identify student and educator needs and develop a plan of action. Each year ACCEPT honors one of our exceptional educators with the Susan S. Rees Award for Excellence in Teaching and Learning. This year **Anne Donovan** was selected by her peers. Anne, ACCEPT's first full-time consultant, joined ACCEPT in 2007 when we had just one contract for school consultation services. Over the years she has grown the consultative services to more than 100 contracts per year overseeing six amazing consultants. Her success also prompted the establishment of Home-Based services, which with its own Director oversees 28 therapists and provides services to 69 families.





During Summer 2018 there were 116 students who participated in Extended School Year programs.

### EXTENDED SCHOOL YEAR (SUMMER)

The Extended School Year programs are designed to prevent substantial regression of skills and provide a bridge between academic years. Structured individual, small group, and classroom instruction is provided consistent with the students' Individualized Education Programs. In summer 2018, our transition and elementary students enjoyed the new Center for Learning and Growth. In addition, we had elementary, middle, and high school programs at Medway Public Schools.

Each summer staff selects a theme and plans curriculum, activities, and community outings with that theme in mind. The 2018 theme was An ACCEPTionally Bright Summer with activities and celebrations focusing on energy conservation and recycling.

### Value and Cost Comparisons - Extended School Year

Location	Type of program	Member Tuition	Non-Member Tuition	Member Savings	Average Private School Tuition	Average Savings Over Private School
ACCEPT Center for Learning and Growth or Medway Public Schools	Academic and Therapeutic	\$6,374	\$7,649	\$1,275	\$72,658	\$535
	Academic and Life Skills	\$6,374	\$7,649	\$1,275	\$93,070	\$535
	Academic and Language-Based	\$6,374	\$7,649	\$1,275	\$59,302	\$535
	Transition	\$6,374	\$7,769	\$1,295	\$10,707	\$4,233



# EDUCATOR DEVELOPMENT

Our professional development experts include leading educators and members of the ACCEPT senior staff who make it their mission to stay ahead of trends and respond quickly to district needs.

EDUCATOR DEVELOPMENT
Professional Development for Educators
Customized Trainings for Districts
Online Learning
Special Education Leadership Institute

## PROFESSIONAL DEVELOPMENT WORKSHOPS, COURSES AND ONLINE OFFERINGS

ACCEPT believes that what matters most in student achievement is excellent teaching and learning. Professional development programs are designed to meet the instructional, management, and leadership challenges that educators face on a daily basis, and our innovative workshops and courses are offered in a variety of formats including online, hybrid, and in-person options. Our website is updated regularly to reflect our full listing of offerings.

### Professional Development Workshops

ACCEPT's high quality professional development courses and workshops are designed to meet the instructional, management, and leadership challenges that educators face daily. These programs target struggling learners, narrow the achievement gap, and improve outcomes for all students.

Sample workshops offered in 2018-19 included Social Studies Update, SEI Full Teacher Endorsement, Legal Issues Update – School Refusal and Co-Teaching & Inclusive Practices to Close the Achievement Gap.

### Customized Trainings for Districts

On-site, customized, professional development workshops are tailored to each district's specific needs. Our presenters, who are also highly-skilled practitioners, have expertise in a wide range of topics in the field of special education and inclusive practice. Both workshops and job-embedded coaching train educators to apply new skills in their districts.

# ANNUAL REPORT

## By the Numbers

**1,010** educators took part in **22** workshops and courses

**149** participants in "Differentiating in Inclusive Classrooms" workshops

**376** Paraprofessionals from **3** districts enrolled in online training



## Value and Cost Comparisons

ACCEPT's Educator Development offerings are high value, both in quality and cost. Post-workshop evaluations, as well as the number of educators who register for workshops and courses year after year, are indicators of the quality and practicality of our offerings in helping educators address their current challenges. ACCEPT offerings are at or below the cost of other workshops in the area. A review of offerings from Research for Better Teaching, Teachers21, and the Reading Institute shows a range of \$195 to \$300 per day for a workshop. The average per day cost for an ACCEPT workshop is approximately \$175.



## ACCEPT

UNLOCKING POTENTIAL • ACHIEVING SUCCESS

*" I really enjoyed my time at this Job Alike group! Loved the speakers that were brought in and the ability to connect outside of the group. "*

*– Professional development participant*



Sample in-district workshops offered in 2018-2019 included Functional Behavior Assessment: From Conceptualization to Practice, Registered Behavior Technician (RBT®) Training Course, The Nuts and Bolts of Transition Planning, and DESE's Low-Income Education Access Project (LEAP) Training.

### Social Studies Series

Our ACCEPT Collaborative Social Studies Learning Series ran from September through April with a consistent audience of about 30 curriculum directors or assistant superintendents, history/social department heads, and secondary and elementary teachers. Led by a social studies district department head and member of the advisory committee tasked with creating the state's new history and social studies frameworks, the series provided participants the opportunity to learn about the new frameworks and explore best practices in the field of social studies education including place-based education, civic learning, content area literacy, and digital integration and resources.

### Professional Learning Communities

Professional learning communities, also known as job-alikes, bring together district administrators with similar jobs. In 2018-2019, ACCEPT facilitated three job-alike cohorts who also provide advice and input to ACCEPT on district needs and collaborative services. See page 26 for a list of participants in the Special Education, Curriculum Leadership, and Business Operations groups. ACCEPT also offered a series of job-alike groups for pre-school, elementary, and high school special education coordinators, as well as BCBAs.

### BCBA Professional Learning Community

ACCEPT has been a partner with Massachusetts Association for Applied Behavior Analysis (MassABA) since September 2017, co-sponsoring our monthly workshop series "Professional Practices Symposium for Public School BCBAs." This is the largest network of public school BCBAs in the state, which currently represents 87 BCBAs in 40 districts across the Commonwealth.

### Special Education Administrators Institute: New Directors

Twenty-three new Special Education Directors from across Massachusetts took part in the 16th year-long Institute. The intensive begins with a week-long summer institute that covers all the skill/knowledge essentials for new Directors as well as leadership training, followed by a year of mentoring by a seasoned special education director. Problems of Practice seminars give the cohort an ongoing professional learning community, and finally a capstone project using data and inquiry to improve an in-district practice completes participant training. Graduates of the Institute are invited to join the Problems of Practice seminars to continue their learning as well. The program is made possible by a grant from the MA Department of Elementary and Secondary Education (DESE).

# SERVICES

As an extension of the district we have intimate knowledge of their challenges and readily customize services to meet the specific need. Our demonstrated ability to respond to the evolving environment and regulatory changes are true differentiators of ACCEPT services.

SERVICES
Home-Based Therapeutic Program
Consultation and Evaluation Services for Districts
VHS Online (Virtual High School)
Special Education Transportation Services
Medicaid Reimbursement Services for Towns

## HOME-BASED SERVICES

ACCEPT Home-Based Services are provided in the home and/or in the student's community, and are tailored to address each student's individual needs. The focus is on training the family/parents to better support their child as well as to improve the students' independent living skills across the home and community. Parents and families are an active part of every session. The ultimate goal of services is for the parent/family to carry out programs so that the student is successful in their natural environment and to supplement and facilitate the child's educational progress. These services provide an opportunity to integrate the effective strategies being used at school into the student's home and community.

To determine the scope and sequence of services, initial assessments may include:

- Home Functional Behavior Assessments (FBA)
- Adaptive Living Skills Assessment (Home and Community)

Assessment results guide the selection of service delivery models:

- Direct service model
- Parent training
- 8-Session parent training

# ANNUAL REPORT

## By the Numbers

- 89 families received one or more home-based service
- 61 direct services & parent training
- 28 families benefited from home
- 42 different home assessments
- 17 students transitioned from our home-based services
- 14 school districts utilized home-based services including 12 member districts and 2 non-member districts.



## Value and Cost Comparisons

ACCEPT's home-based service rates for member districts are 10% – 55% lower than the rates of comparable private agencies.

Some area agencies charge \$250 per hour for a functional behavioral assessment (FBA) compared to ACCEPT member district rate of \$90 per hour. A typical FBA requires 14-16 hours so the savings for a district can be as much as \$2,500 for a single assessment.

# ANNUAL REPORT

## By the Numbers

102 contracts with 37 districts for consultation and evaluation.

Of those 13 were member districts and 24 non-member districts



## Value and Cost Comparisons

ACCEPT's consultation and evaluation services rates for member districts are 25% – 30% lower than the rates of comparable private agencies. For non-member districts, rates are 10% –15% lower than private agencies.

# CONSULTATION AND EVALUATION SERVICES

ACCEPT offers a variety of consultation options and technical assistance to help school districts build their capacity to meet the needs of diverse student populations. Our team of expert consultants works with member and non-member districts to improve and enhance a range of special education programs and services with a strong emphasis on collaboration and long-lasting partnerships.

## CONSULTATION AND EVALUATION SERVICES

Consultation and evaluation services continue to expand to meet the growing needs of member and non-member districts. Our consultation staff provide services in behavioral/educational consultation, vocational consultation, curriculum consultation, instructional technology consultation, and related services consultation (PT, OT, SLP) as well as a variety of student-specific and program-wide evaluations.

### School Consultation

- District Special Education Program Evaluations & Technical Assistance (e.g., inclusive preschool programs, Autism programs, Transition programs, etc.)
- Transition Specialist Consultation
- Augmentative and Alternative Communication (AAC) Specialist Consultation
- Low-Income Education Access Project (LEAP) Consultation
- Job Coaching/Transition Tutoring

### Student Evaluation Services

- Comprehensive Transition Assessments
- Vocational-Only Assessments
- Functional Behavior Assessments (FBA)
- Trauma-Informed Evaluations
- Augmentative and Alternative Communication (AAC) Evaluations
- Speech/Language Evaluations
- Psychological Evaluations



# VHS (VIRTUAL HIGH SCHOOL)



VHS provides districts with a wide range of high quality online courses that offer flexible credit recovery, opportunities for accelerated students, unique electives, career-focused coursework, summer courses, and more.

VHS is also well-suited to the needs of students at ACCEPT High School Academy. ACCEPT teachers customize the courses utilizing blended learning that accommodates the individual learning needs of each student. The VHS modules are rigorous and meet graduation credit and syllabus requirements. Students from Middle School through age 22 participated in these courses.

More information is available at [vhscollaborative.org](http://vhscollaborative.org)

Some of the courses include:

- Biotechnology
- Business and Personal Law
- Business Math
- CAD
- Climate Science
- Contemporary Issues in American Law and Justice
- Engineering Principles
- Entrepreneurship
- Environmental Science
- French, German, Italian, Latin, and Spanish Language & Culture
- History of Photography
- International Business
- Java Programming
- Journalism in the Digital Age
- Kindergarten Apprentice Teacher
- Marketing and the Internet
- Modern Middle East
- Music: Fundamentals of Composition
- Personal Finance
- Pre-veterinary Medicine
- Sports and Society
- Video Game Design

## ANNUAL REPORT

### By the Numbers

570 seats in 412 innovative online courses

441 students benefited from courses



## VALUE AND COST COMPARISONS

As part of the Consortium, teaching membership districts paid \$150 per VHS seat. Rates for districts who purchase seats only range from \$250-\$400 depending upon the number of seats purchased. These rates compare very favorably to a district's costs for in-school classrooms, especially in classes with lower enrollments. In addition, a high quality online course is an efficient solution for students who have individual needs that do not fit the usual school offerings and calendar.

# ANNUAL REPORT

## TRANSPORTATION

### By the Numbers

582 students transported to 133 locations

125 vans, 102 drivers, 28 monitors transport students safely from home to school and back every day

*" Thanks to the ACCEPT drivers for taking such good care of my son. I am truly touched (by their kindness)...great job. "*

– ACCEPT Parent

### VALUE AND COST COMPARISONS

ACCEPT utilizes an assessment model to price transportation for member districts. This allows districts to pay a fee equivalent to the actual cost of providing special education transportation services to the students in their district. Assessments are calculated annually, providing districts with the data necessary to budget accurately and allowing ACCEPT to meet its costs, an advantage not available from for-profit transportation vendors. Looking ahead to FY20, the decision of our largest district to move their transportation services to an outside vendor will impact the remaining districts that utilize our transportation services as the costs of transportation infrastructure will be divided by fewer transportation seats. We will monitor the changes and seek efficiencies that maintain high quality service while also reducing costs where possible.



ACCEPT has provided specialized transportation services for member districts for more than 40 years.

Each day more than 582 students are picked up at their homes, delivered to over 133 destinations -- either their special education program at ACCEPT or other schools in Massachusetts -- and safely returned home at the end of the day. A fleet of over 125 vans and 130 drivers and monitors meet the individual needs of each student ensuring a comfortable and positive experience.

Each van transports 1-4 students creating a complex system of routing -- varying by start and end times of programs, pick up and drop off locations, and daily variations due to absences, snow days, differences in school calendars location by location. Communication is an ongoing challenge, with no room for error. Transportation routing software, GPS systems, cameras, and mobile devices all enhance safety and efficiency. New this year, we have realized a long-term vision with longer office hours and enhanced staff infrastructure. We are now better able to provide daily communication, adjustments to transportation schedules, and proactive fleet management, as requested by families and districts.

With tight Metrowest job markets, retaining and recruiting new drivers continues to be a challenge. Our new Driver Supervisor/Dispatcher provides increased driver and monitor training and support intended to improve service and job satisfaction. And our recently hired Fleet Manager is already making a difference monitoring van maintenance and ensuring that every van is in tip-top condition at all times.



# MEDICAID REIMBURSEMENT

In 1994, ACCEPT Education Collaborative established the School-Based Medicaid Reimbursement Program for member and non-member districts to recoup money spent on school-based health and related medical services. Over the past 25 years this program has returned over \$65 million to participating cities and towns.

We are pleased to report that Sudbury re-started Medicaid claiming in 2019. Several factors are driving down Medicaid reimbursement totals, including:

- Increasingly stringent requirements for claiming
- Our largest district moving transportation costs to a grant, which is ineligible for Medicaid claiming.

We expect these to continue reducing reimbursements for districts and consequently ACCEPT in the coming years.

## VALUE – DISTRICT-BY-DISTRICT REIMBURSEMENT DETAIL

During Fiscal Year 2019 these districts received a total of \$4,197,079 in Direct Service and Administrative Activity Claiming

School District	Direct Service Reimbursement	Admin Billing Reimbursement	Total Payments FY19 Payments
Ashland	\$74,637	\$80,943	\$155,580
Auburn	\$63,588	-	\$63,588
Bedford	\$30,032	\$7,398	\$37,430
Carlisle	5,454	-	\$5,454
Foxboro	\$44,588	\$43,556	\$88,144
Framingham	\$574,830	\$935,795	\$1,510,624
Franklin	\$135,033	\$139,956	\$274,988
Holliston	\$38,981	\$47,109	\$86,089
Hopkinton	\$21,276	\$23,682	\$44,958
Lincoln/Sudbury Reg.	40,157	-	\$40,157
Littleton	\$49,920	\$22,574	\$72,494
Medfield	\$23,344	\$28,480	\$51,824
Medway	\$33,705	\$31,615	\$65,319
Millis	\$20,166	\$23,222	\$43,387
Natick	\$131,019	\$280,962	\$411,980
Northern Berkshire Reg.	\$11,277	-	\$11,277
South Middlesex Reg.	\$19,155	\$20,190	\$39,346
Sudbury	\$2,079	-	\$2,079
Walpole	\$100,401	\$458,070	\$558,471
<b>TOTAL</b>	<b>\$1,419,640</b>	<b>\$2,143,550</b>	<b>\$3,563,190</b>

# ANNUAL REPORT

## By the Numbers

**\$3,563,190** returned to 18 municipalities in Medicaid reimbursements

Annual direct service reimbursements ranged from **\$7,398** to **\$935,785**

Annual administrative reimbursements ranged from **\$2,079** to **\$574,830**



## Services Include

- Program set-up & ongoing maintenance
- Quarterly identification of eligible students
- Submission of electronic claims for direct services
- Follow-up with out-of-district programs to obtain service documentation for students
- Preparation of quarterly administrative claims on behalf of the districts
- Calculation of annual Direct Service Cost Reports
- Ongoing assistance with understanding constantly evolving state regulations and program changes
- Creation of custom reports for districts
- Unlimited training for district staff on the Medicaid reimbursement process and systems
- Assistance for the district if selected for an audit

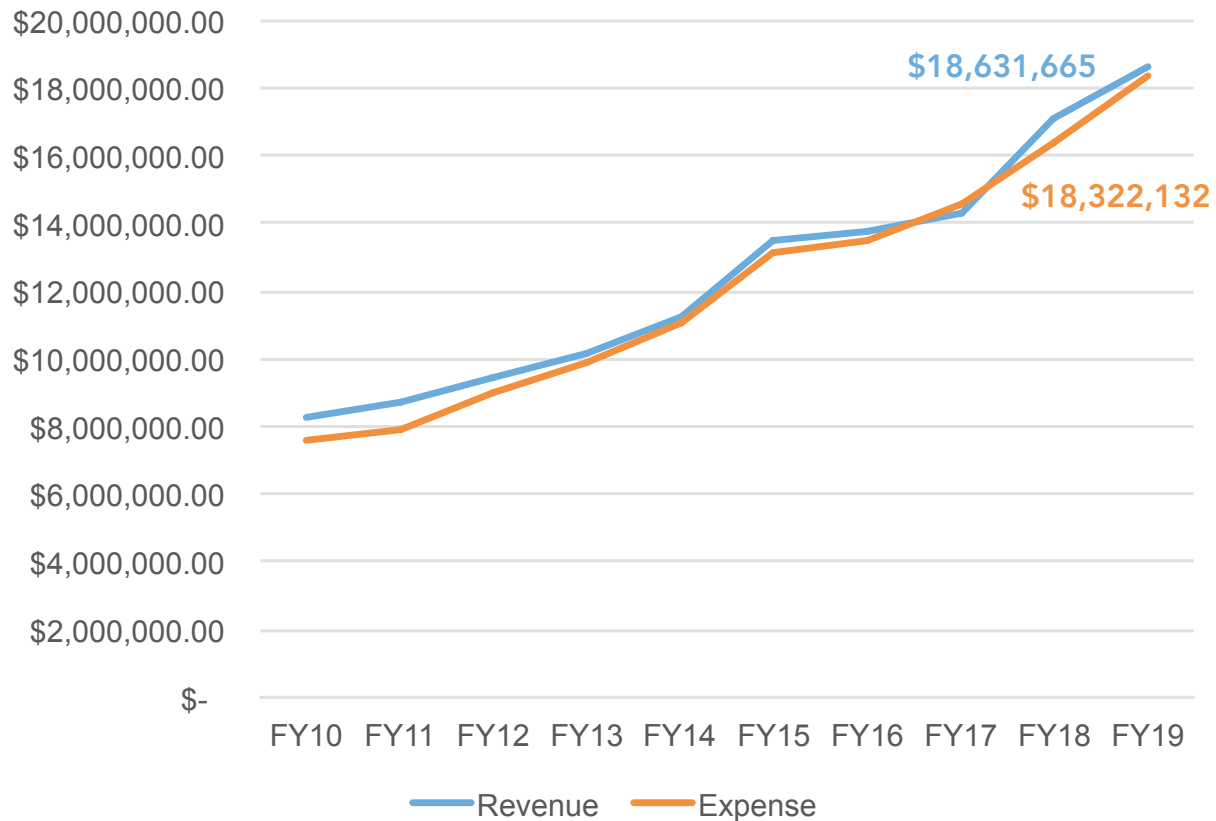
# ANNUAL REPORT

# FINANCIALS



FISCAL YEAR 2019	Revenue	%	Expense	%
School Year Tuition & Services	\$7,727,333	41.47%	\$7,466,484	40.75%
Transportation	\$8,741,768	46.92%	\$8,593,554	46.90%
Home-Based Services	\$486,895	2.61%	\$572,408	3.12%
Professional Development	\$91,590	0.49%	\$81,514	0.44%
School Consultation/ Evaluation	\$274,401	1.47%	\$366,474	2.00%
Extended Year Tuition & Services	\$807,233	4.33%	\$800,361	4.37%
Medicaid Reimbursement	\$219,914	1.18%	\$198,884	1.09%
Administration	\$85,235	0.46%	\$61,900	0.34%
Technology	\$197,297	1.06%	\$180,553	0.99%
	\$18,631,665	100.00%	\$18,322,132	100.00%

Total Annual Revenue and Expense Trend



# ADVISORY COMMITTEE MEMBERS

# ANNUAL REPORT

Job-alike advisory groups, composed of district leaders in Special Education, Curriculum, and Business Operations provide input into the development and implementation of ACCEPT programs and services. Members work collaboratively, as a professional learning community, throughout the school year to support each other as 21<sup>st</sup> century educational leaders.

## SPECIAL EDUCATION

Marcia Berkowitz, ACCEPT Facilitator  
Kathryn Silva, Ashland  
Debbie Dixon (interim), Dover-Sherborn  
Laura Spear, Framingham  
Ildefonso Arellano, Framingham  
Paula Marano (interim), Franklin  
Meg Camire, Holliston  
Karen Zaleski, Hopkinton  
Mary Bruhl, Medfield  
Kathleen Bernklow, Medway  
Sue Anne Marks, Millis  
Tim Luff, Natick  
Mary Lammi, Needham  
Michael Dolan, South Middlesex Regional  
Stephanie Juriansz (interim), Sudbury  
Lori Cimeno, Wellesley

## BUSINESS OPERATIONS

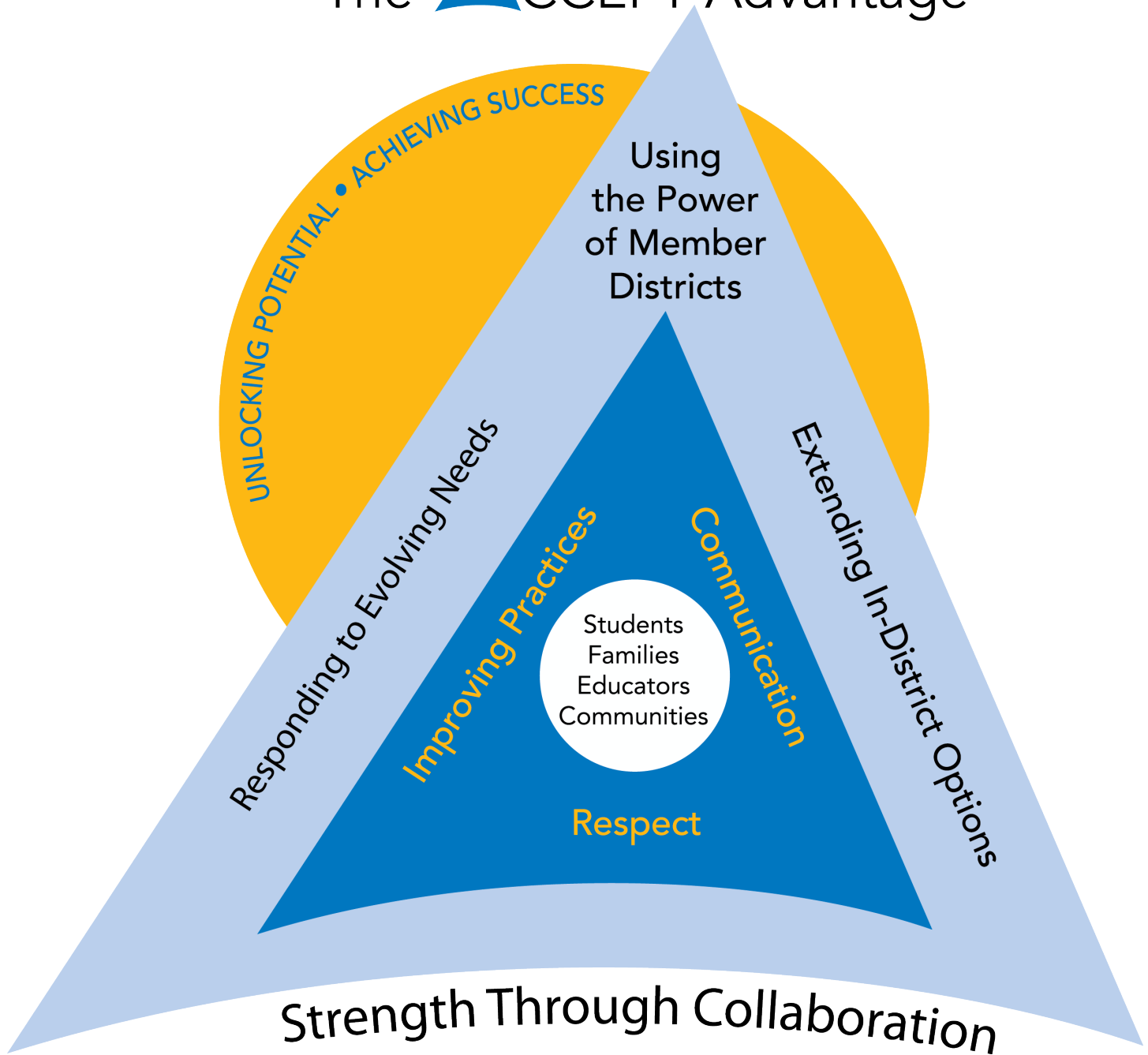
Cathy Ellis, ACCEPT Facilitator  
Barbara Durand, Ashland  
Dawn Fattore, Dover/-herborn  
Lincoln Lynch, IV, Framingham  
Miriam Goodman, Franklin  
Keith Buday, Holliston  
Susan Rothermich, Hopkinton  
Michael A. LaFrancesca, Medfield  
Don Aicardi, Medway  
Terry Wiggin, Millis  
Peter Gray, Natick  
Melissa Martel, Natick  
Anne Gulati, Needham  
Dolly Sharek, South Middlesex Regional  
Donald Sawyer, Sudbury  
Cindy Mahr, Wellesley

## CURRICULUM LEADERSHIP

Marcia Berkowitz, ACCEPT Facilitator  
Paul Vieira, Ashland  
Elizabeth McCoy, Dover-Sherborn  
Anne Ludes, Framingham  
Amy Bright, Framingham  
Joyce Edwards, Franklin  
Peter Botelho, Holliston  
Jennifer Parson, Hopkinton  
Kim Cave, Medfield  
Gabrielle Abrams, Medway  
Joan Lynn, Millis  
Kirk Downing, Natick  
Theresa Duggan, Needham  
Rebecca Swasey, South Middlesex Regional  
Kim Swain, Sudbury  
Joan Dabrowski, Wellesley



# The CCEPT Advantage



The ACCEPT Education Collaborative does not discriminate against students, parents, employees or the general public on the basis of race, color, sex, homeless status, gender identity, religion, national origin, sexual orientation, disability, or age. ACCEPT is also committed to maintaining a school environment free of harassment. Harassment based on race, color, religion, national origin, gender, sexual orientation, gender identity, homeless status, age or disability is prohibited. In addition to the protected classes identified above, as to employment practices, ACCEPT also does not discriminate based on genetic information, ancestry or status as a veteran. The sending district also provides equal access to the Boy Scouts, Girls Scouts and other designated youth groups in accordance with the Boy Scouts of America Equal Access Act. 20 U.S.C. § 7905; 34 C.F.R. Part 108. The Collaborative also does not discriminate against students on the basis of homelessness in a manner consistent with the requirements of the McKinney-Vento Act. For more information contact ACCEPT's designated compliance coordinator Donna Flaherty, 4 Tech Circle, Natick MA 01760. (508)653-6776



ACCEPT  
Education Collaborative

Center for Learning and Growth  
4 Tech Circle, Natick, MA 01760  
508-653-6776

[www.accept.org](http://www.accept.org)

## Questions?

Here are three ways to learn more:

- Visit [www.accept.org](http://www.accept.org)
- Contact us via email at [info@accept.org](mailto:info@accept.org)
- Call us at 508-653-6776

**Unlocking Potential – Achieving Success**