



## **BUDGET OVERVIEW**

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## Superintendent's Budget Message

March 1, 2019

Dear School Committee Members, Elected Officials, and Residents of Lexington:

It has been said that budgets are moral documents, which is a truth that bears repeating. A budget reveals a community's priorities and values, and here in Lexington, students are what matter most.

The carefully selected student artwork that adorns the Budget document in your hands reveals the diversity of our school community and reflects the impressive talent of our young people. The artistic renderings further symbolize the community's desire to nurture and grow our students' creative, as well as academic, talents. Each student's unique masterpiece reminds us that Lexington schools are culturally diverse and united by a shared sense of purpose and pride.

Young people are at the heart of all that we do, and we emphasize their importance throughout our FY 2020 budget guidelines and goals. We dedicate resources to ensure smaller class sizes and academic innovations, such as the continued exploration of elementary world languages and project-based learning. We prioritize the health and well-being of students by allocating funding for inclusion specialist support for teachers and elementary health education. We reflect our commitment to diversity, equity, and inclusion in the funding designated for an equity audit and a new "Director of Equity and Student Supports," designed to serve our students and families. Finally, our proposed budget supports collaborative, community-based endeavors, including the Town's joint mental health initiative and the school department's strategic planning effort, which provide direct support to students and strengthen our school-community partnerships.

The Town of Lexington has historically and generously divided its revenues by allocating 74% to the schools and 26% to the municipality. While we are grateful for our annual allocation, we are not without tough choices. The FY 2020 recommended budget takes into account approximately \$2.4 million in Lexington educator requests. Based on the allocation we received, we can fund an estimated \$1.3 million, or roughly half of those requests, with the majority of resources dedicated to meeting state and federal educational mandates and rapidly increasing enrollments.

In our view, there continue to be unfunded educator requests—of the remaining \$1.1 million—that are worthy of continued consideration. We recognize that there are finite resources available in any given year, and we are grateful to the Town Administrator for the additional \$84K allocated to the school department at Financial Summit #4. Fortunately, we were also able to find efficiencies, such as an economical approach to a later school start and a creative plan to address the need for additional LHS science labs that saved over \$1 million; otherwise, the list of unresolved budgetary requests would have grown longer. We will continue to maintain a responsible budget and collaborate with Town officials to respond to thoughtful budgetary requests in the years to come.

It is a privilege to serve as your new Superintendent of Schools, and it is an exciting time for Lexington! As we work together to build an educational vision for the future, please know that I am honored to serve your children and grateful for your time, energy, and commitment to the Lexington Public Schools.

Sincerely,

Dr. Julie Hackett  
Lexington Public Schools  
Superintendent of Schools



## Mission/Vision Statement of the Lexington Public Schools

The Lexington Public Schools serve to inspire and empower every student to become a lifelong learner prepared to be an active and resilient citizen who will lead a healthy and productive life. Educators, staff, parents/guardians, and community members will honor diversity and work together to provide all students with an education that ensures academic excellence in a culture of caring and respectful relationships.

### **Guiding Principles:**

We believe that all students can learn at high levels. This is achieved by:

- Promoting a mindset that intelligence is not fixed and can continuously be developed
- Providing all students with necessary and timely appropriate interventions and extensions to advance their learning
- Developing each student's unique gifts
- Nurturing physical, social, and emotional well-being
- Expanding learning through diversity
- Engaging students in relevant, experiential, and personalized learning
- Cultivating creative problem solving, critical thinking, and innovation
- Promoting integrity, civility, and global citizenship
- Creating an environment in which the community and schools are partners
- Fostering a culture of open communication, trust, and shared responsibility
- Empowering all staff to be collaborative educators, learners, and leaders
- Providing inspiring professional learning for all

**Mission/Vision Statement was adopted by Lexington School Committee: July 2015**



## Organizational Structure

The Education Reform Act of 1993 determined that the School Committee’s charge is (1) to select and terminate the Superintendent; (2) to review and approve the budget; and (3) to establish educational goals and/or policies for the district consistent with the requirements of law and statewide goals and standards established by the Department of Elementary and Secondary Education.

### School Committee Members

|                             |                    |
|-----------------------------|--------------------|
| Eileen Jay, Chair           | Term Expires: 2019 |
| Kathryn Colburn, Vice Chair | Term Expires: 2020 |
| Alessandro Alessandrini     | Term Expires: 2019 |
| Kathleen Lenihan            | Term Expires: 2021 |
| Deepika Sawhney             | Term Expires: 2021 |

### Student Representative

|               |                    |
|---------------|--------------------|
| Rosanna Jiang | Term Expires: 2018 |
|---------------|--------------------|

## Budget Development

### Budget Process

Annually, the administration develops its capital and operating budgets, which begin July 1 and end June 30. This highly collaborative and public process engages the Board of Selectmen, the School Committee, the Appropriation Committee, the Capital Expenditures Committee, municipal and school staff, and citizens. The employees of the Finance Office are responsible for coordinating, developing, and monitoring the annual budget process. Each year, the School Committee develops its annual goals, budget guidelines, and budget calendar. These provide the administration with the roadmap to develop the recommended annual budget. The Superintendent is tasked with developing a budget that advances the district in concert with the outlined policy objectives. The School Committee is responsible for reviewing and approving the budget for incorporation within the full Town budget.

#### Major Steps in FY 2020 Budget Development:

**Summer:** School Committee and Superintendent establish Collective Goals (2018–2020).

**Early Fall:** School Committee approves annual budget guidelines and calendar.

**Fall:** Staff develop budget recommendations.

**Late Fall/Early Winter:** All departments meet with the Assistant Superintendent for Finance and Operations to review existing staffing levels, review budget priorities, and discuss anticipated budget requests. During this time, a series of working summit meetings including the Board of Selectmen, the School Committee, the



Appropriation Committee, and the Capital Expenditures Committee are conducted to discuss the current financial health of the Town, along with any budgetary issues, and provide policy guidance to the municipal and school staff in finalizing budget recommendations. The Superintendent, in consultation with the Assistant Superintendent for Finance and Operations and the School Department's Administrative Council, reviews budget requests and makes recommendations for all school programs to the School Committee. The School Committee takes the recommendations of the Superintendent and after public hearings on the Superintendent's Budget Recommendations, makes final budget decisions consistent with their collective goals.

**Early Spring:** A month before Town Meeting discusses financial articles, the approved budget of the School Committee is distributed to Town Meeting members and the finance committees; it also is available to citizens at the Library and the Town Manager's Office. In addition, the budget documents are publicly available on the Lexington Public Schools website: <https://lps.lexingtonma.org/Page/11276>.

**Spring:** The Annual Town Meeting begins in March with meetings held on weekday evenings. Town Meeting debates and adopts the School Department budget as part of the total Town budget. Town Meeting has authority over the total appropriation of school department funds, but line-item authority and spending priorities are the purview of the School Committee.

## **Budget Guidelines**

On October 23, 2018, the School Committee voted the FY 2020 Budget Guidelines and requested that the Superintendent present a level-service budget that addresses the fifteen highlighted areas. These guidelines serve as the basis for the Superintendent's Recommended Budget in FY 2020. For purposes of clarification, a level-service budget is defined as an allocation of the funds necessary to replicate the current level of services provided, accommodating increases in enrollment, all legal requirements, including current collective bargaining requirements, and special education laws. The FY 2020 budget guidelines are as follows:

In order to provide for the educational needs of Lexington students, the Superintendent of Schools will develop a fiscal year 2020 budget that will:

1. Ensure the safety, security, and social-emotional well-being of our students.
2. Ensure all legal and contractual mandates will be met.
3. Ensure professional staffing guidelines will be met and class sizes will remain within the established guidelines, to the extent possible given space limitations.
4. Identify efficiencies and cost-saving measures that do not compromise the educational program.
5. Include sufficient operating and capital funds to:
  - a. continue the current level of services;
  - b. be responsive to projected enrollment growth and corresponding needs, including those related to staffing, instructional supplies, and facilities;
  - c. move the district forward in meeting the increasing technological demands in various educational settings;
  - d. implement a master capital plan to expand school capacity and meet rising enrollment;



- e. support the successful submission of a Statement of Interest (SOI) for Lexington High School and advocate for proper budgetary planning in the feasibility and design phases.
- 6. Maintain capital assets in order to support the instructional program, protect the physical assets of the Town of Lexington, and ensure the health and safety of our students and staff.
- 7. Identify funds and strategies to implement diversity, equity and inclusion efforts and to increase the cultural proficiency of our school community.
- 8. Identify funds and strategies to continue to leverage and support social and emotional learning efforts throughout the district.
- 9. Identify funds and strategies to leverage and support project-based learning efforts throughout the district.
- 10. Continue to explore possible alternatives and improvements to school schedules at all levels, including elementary health education, K–8 World Languages, and the scope and sequence of science classes at the secondary level.
- 11. Identify costs, impacts, and an implementation plan associated with changes in school start times for Lexington students.
- 12. Identify funds and/or strategies necessary to develop a multi-year comprehensive Lexington Public Schools Strategic Plan for the district, to include equity and master planning.
- 13. Identify funds and/or strategies to continue the research and implementation of graduation requirements.
- 14. Identify funds and/or strategies to create an elementary and middle school redistricting plan.
- 15. Continue the Town’s joint effort on mental health.

## **Budget Calendar**

Each year, the Superintendent presents a budget calendar to the School Committee. This calendar outlines the timing of events and guides the budget development process. This timeline can be found below:

### **2018**

|                        |   |
|------------------------|---|
| September 21           | FY 2020 IT capital budget submitted to Town of Lexington  |
| September 25           | School Committee reviews FY 2020 budget calendar  |
| October 1 – October 12 | Review capital proposals: Superintendent, Director of Public Facilities, and Assistant Superintendent for Finance and Operations                    |
| October 1 – October 12 | Superintendent, Director of Public Facilities, and Assistant Superintendent for Finance and Operations discuss project requests with administrators |



**Lexington Public Schools**  
***FY 2020 Superintendent and School Committee Recommended Budget***

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|                          |  |
|--------------------------|--|
| October 1                | Google Form link distributed for FY 2020 staffing and expense budget requests. FY 2020 Google Form requests for staffing and expenses are due to the Assistant Superintendent for Finance and Operations at the date of individual budget meeting. |
| October 9                | School Committee approves FY 2020 budget calendar and reviews the FY 2020 budget guidelines  |
| October 15 – October 19  | SPED budget staffing meetings (with Assistant Superintendent for Finance and Operations, ETS, Director of Special Education, and building principals)  |
| October 19               | Submittal of Town (Municipal & School) FY 2020–2024 Capital Requests to Capital Expenditure Committee (CEC) and Community Preservation Committee (CPC)   |
| October 22               | Summit I: Financial Indicators; Two-year Revenue and Expenditure Projection; 5-Year Revenue and Expense Forecast   |
| October 29 – November 16 | Budget Review: Central Office and department staff meet at assigned times  |
| October 30               | Recommended FY 2020 capital budget requests approved by the School Committee (School Department and Public Facilities)   |
| December 6               | Summit II: FY 2020 Revenue Projection; FY 2020 Revenue Allocation Model  |
| December 21              | Superintendent finalizes FY 2020 budget recommendation   |
| December 24 – January 1  | School Vacation Week   |

**2019**

|                        |  |
|------------------------|--|
| January 4              | Budget distributed to School Committee and posted to website   |
| January 8              | School Committee Meeting: Superintendent’s Budget Presentation   |
| January 15 (8:00 a.m.) | School Committee Public Hearing and discussion of the Superintendent’s Recommended FY 2020 Budget: Location: Selectmen's Meeting Room                    |
| January 22             | School Committee Public Hearing and discussion of the Superintendent’s Recommended FY 2020 Budget: Location: Selectmen's Meeting Room                    |
| January 28             | Town Manager Submittal of FY 2020 Recommended Operating Budget & FY 2020–2024 Capital Improvement Plan (CIP) to Board of Selectmen (White Book)          |
| January 29             | School Committee FY 2020 budget discussions, consideration of community feedback on FY 2020 Operating Budget (including fees) and FY 2020 Capital Budget |
| January 31             | Summit III: FY 2020 White Book Review  |



|                   |  |
|-------------------|--|
| February 5        | School Committee adopts FY 2020 Operating Budget (including fees) and FY 2020 Capital Budget   |
| February 13       | Summit IV: FY 2020 Brown Book Preview  |
| February 25       | Board of Selectmen vote to approve FY 2020 Recommended Operating Budget and FY 2020–2024 Capital Improvement Plan (CIP)  |
| February 27       | 2019 Annual Town Meeting School Committee Fiscal Year 2020 Recommended Operating Budget document finalized (TMMA)  |
| March 1           | Distribution of FY 2020 Recommended Operating and Capital Budget to TMMA, Town Manager, Senior Management Team, Appropriation Committee, Capital Expenditures Committee, Selectmen, School Committee, Central Office, and Principals |
| March 25–April 24 | Annual Town Meeting (Mondays and Wednesdays until completed; Town Meeting does not meet during April school vacation week)   |
| TBD               | Budget presentation to Town Meeting by the Town Manager and Superintendent   |
| April 25          | Notification of budget approvals; Employee Action Forms sent to Human Resources  |
| June 3            | School Operating Budget opens for entry of supply and services requisitions  |

## Revenue Allocation Process

The Town of Lexington has established a collaborative budget development process that is conducted through a series of budget summit meetings. These budget summit meetings begin in October and end in February. These meetings include the Board of Selectmen, the School Committee, the Appropriation Committee, and the Capital Expenditures Committee. Topics covered at these meetings include:

- Summit I: Financial Indicators; 5-Year Revenue and Expense Forecast
- Summit II: FY 2020 Revenue Projections; FY 2020 Revenue Allocation
- Summit III: FY 2020 White Book Review
- Summit IV: FY 2020 Brown Book Preview

The Revenue Allocation Model, first presented at Summit II on December 6, 2018, provides for a projected 5.4% increase over the School Department’s FY 2020 budget, the detail of which is broken out in the table that follows:





**Town of Lexington**  
**Financial Summit II**

**FY2020 Revenue Allocation Model**

| \$229,266 |              | Projected FY2020 Revenue |             |              |   |
|-----------|--------------|--------------------------|-------------|--------------|---|
|           |              | Shared                   | Municipal   | School       | (\$s in 000s)   |
| (1)       | \$ (108,111) | \$ —                     | \$ —        | \$ (108,111) | FY2019 school budget  |
| (2)       | \$ (38,270)  | \$ —                     | \$ (38,270) | \$ —         | FY2019 municipal budget                                       |
| (3)       | \$ (214)     | \$ —                     | \$ (214)    | \$ —         | Tax Levy Support of Community Center (Article 5)              |
| (4)       | \$ (2,504)   | \$ (2,504)               | \$ —        | \$ —         | FY2020 Minuteman  |
| (5)       | \$ (6,406)   | \$ (6,406)               | \$ —        | \$ —         | FY2020 Contributory Retirement                                |
| (6)       | \$ (15)      | \$ (15)                  | \$ —        | \$ —         | FY2020 Non-Contributory Retirement                            |
| (7)       | \$ (28,723)  | \$ (28,723)              | \$ —        | \$ —         | FY2020 Benefits   |
| (8)       | \$ (200)     | \$ (200)                 | \$ —        | \$ —         | FY2020 Unemployment   |
| (9)       | \$ (875)     | \$ (875)                 | \$ —        | \$ —         | FY2020 Workers' comp  |
| (10)      | \$ (882)     | \$ (882)                 | \$ —        | \$ —         | FY2020 Property and Liability Insurance                       |
| (11)      | \$ (250)     | \$ (250)                 | \$ —        | \$ —         | FY2020 Uninsured Losses                                       |
| (12)      | \$ (410)     | \$ (410)                 | \$ —        | \$ —         | FY2020 Solar Production Payment                               |
| (13)      | \$ (7,575)   | \$ (7,575)               | \$ —        | \$ —         | FY2020 Debt Service   |
| (14)      | \$ (900)     | \$ (900)                 | \$ —        | \$ —         | FY2020 Reserve Fund   |
| (15)      | \$ (11,431)  | \$ (11,431)              | \$ —        | \$ —         | FY2020 Facilities Department Budget                           |
| (16)      | \$ (196)     | \$ (196)                 | \$ —        | \$ —         | Facilities PIRs for Painting and Security                     |
|           |              | \$ (1,000)               | \$ —        | \$ —         | Set-Aside for as yet identified needs;                        |
|           |              | \$ (200)                 | \$ —        | \$ —         | Unanticipated Current Fiscal Year Needs;                      |
|           |              | \$ (225)                 | \$ —        | \$ —         | Debt Service Mitigation                                       |
|           |              | \$ (1,600)               | \$ —        | \$ —         | Capital Stabilization Fund                                    |
| (17)      | \$ (14,359)  | \$ (700)                 | \$ —        | \$ —         | Transition Free Cash out of Operating Budget - 1st of 5 years |
|           |              | \$ (2,235)               | \$ —        | \$ —         | Pay Down Principal for Land Purchases                         |
|           |              | \$ (3,700)               | \$ —        | \$ —         | Cash Capital  |
|           |              | \$ (1,880)               | \$ —        | \$ —         | OPEB  |
|           |              | \$ (2,617)               | \$ —        | \$ —         | Street Improvement Program                                    |
|           |              | \$ (203)                 | \$ —        | \$ —         | Building Envelope Program                                     |
| (18)      | \$ (221,321) | \$ (74,726)              | \$ (38,484) | \$ (108,111) | Base Budget - Used for Allocation                             |
|           |              |                          | 26.3%       | 73.7%        | Percentage - Municipal and School Only                        |
| (19)      | \$ 7,944     | \$ —                     | \$ 2,086    | \$ 5,859     | Incremental Revenue   |
|           |              |                          | 5.4%        | 5.4%         | Percent of Current Budget                                     |

**Revenue Allocation History & Trends:** Below is the growth factor approved during the last five budget cycles:

- FY 2020: 5.0%
- FY 2019: 6.9%
- FY 2018: 6.6%
- FY 2017: 7.2%
- FY 2016: 8.5%



**Recommended Budget and Summary of Significant Budget Changes**

| Funding Sources   | FY 16 Actual  | FY 17 Actual  | FY 18 Actual   | FY 2019 Budget (adj) | FY 2020 Recommended   | Dollar Increase | Percent Increase |
|---|---------------|---------------|----------------|----------------------|-----------------------|-----------------|------------------|
| Tax Levy  | \$ 91,546,226 | \$ 96,708,616 | \$ 101,204,582 | \$ 107,667,945       | \$ 113,503,676        | \$ 5,835,731    | 5.42%            |
| Fees & Charges  | \$ 514,090    | \$ 584,683    | \$ 450,600     | \$ 443,500           | \$ 466,500            | \$ 23,000       | 5.19%            |
| Total 1100 Lexington Public Schools   | \$ 92,060,316 | \$ 97,293,299 | \$ 101,655,182 | \$ 108,111,445       | \$ 113,970,176        | \$ 5,858,731    | 5.42%            |
| <b>Appropriation Summary</b>  |               |               |                |                      |                       |                 |                  |
| Appropriation Summary   | FY 16 Actual  | FY 17 Actual  | FY 18 Actual   | FY 2019 Budget (adj) | FY 2020 Recommended   | Dollar Increase | Percent Increase |
| Salary and Wages  | \$ 76,222,211 | \$ 81,061,911 | \$ 85,953,852  | \$ 90,703,277        | \$ 95,442,183         | \$ 4,738,906    | 5.22%            |
| Expenses  | \$ 13,059,903 | \$ 14,290,702 | \$ 15,701,329  | \$ 17,408,168        | \$ 18,027,431         | \$ 619,263      | 3.56%            |
| Total 1100 Lexington Public Schools   | \$ 89,282,114 | \$ 95,352,613 | \$ 101,655,181 | \$ 108,111,445       | \$ 113,469,614        | \$ 5,358,169    | 4.96%            |
| * Amounts shown are general fund only and does not reflect spending supported by Labbb Credit, Circuit Breaker Funds, Revolving Funds, or local/state/federal grant funds |               |               |                |                      |                       |                 |                  |
| Transfer to Municipal (Health, Medicare, Workers Comp)  |               |               |                |                      | \$ 369,162            | 25.0 FTE        |                  |
| Transfer to Municipal ( PFD - Custodial)  |               |               |                |                      | \$ 131,400            | 2.0 FTE         |                  |
| <b>Total Recommended</b>  |               |               |                |                      | <b>\$ 113,970,176</b> |                 |                  |
| <u>School Committee Recommended Budget Based on Adjustments Recommended at Summit #4:</u>   |               |               |                |                      |                       |                 |                  |
| Transfer from Benefits (Health Insurance)   |               |               |                |                      | \$84,143              |                 |                  |
| <b>Appropriation Summary</b>  |               |               |                |                      |                       |                 |                  |
| Appropriation Summary   | FY 16 Actual  | FY 17 Actual  | FY 18 Actual   | FY 2019 Budget (adj) | FY 2020 Recommended   | Dollar Increase | Percent Increase |
| Salary and Wages  | \$ 76,222,211 | \$ 81,061,911 | \$ 85,953,852  | \$ 90,703,277        | \$ 95,442,183         | \$ 4,738,906    | 5.22%            |
| Expenses  | \$ 13,059,903 | \$ 14,290,702 | \$ 15,701,329  | \$ 17,408,168        | \$ 18,111,574         | \$ 703,406      | 4.04%            |
| Total 1100 Lexington Public Schools   | \$ 89,282,114 | \$ 95,352,613 | \$ 101,655,181 | \$ 108,111,445       | \$ 113,553,757        | \$ 5,442,312    | 5.03%            |

The School Department was allocated a Revenue increase of \$5,858,731 for FY 2020 through the Revenue Allocation Model adopted at Summit II. In addition to funding the school department budget growth at \$5,358,169, the department will transfer \$369,162 to Municipal accounts for the corresponding benefit costs of the 25.0 FTE projected benefits-eligible positions (of the 26.3 FTE positions requested, 25 FTE are anticipated to require benefits; the remainder are additions to existing positions) proposed in this budget and \$131,400 to Municipal accounts for 2.0 FTE custodial positions and corresponding benefit costs associated with the opening of new facilities in FY 2020—Lexington Children’s Place and the new Hastings Elementary School.

At Summit IV a reallocation of revenue from a Health Insurance enrollment change, offset by a Chapter 70 reduction, resulted in a recommendation from the Town Manager for an additional \$84,143 in revenue allocated to the School Department. This action resulted in the current FY 2020 budget recommendation of \$113,553,757, an increase of \$5,442,312 over FY 2019, at 5.03%.

For FY 2020 the salaries and wages line is increased by \$4,738,906 (or 5.22%) to support existing position salary increases and the addition of 26.63 FTE positions included in this budget. The expense line is recommended to increase by \$703,406 (or 4.04%) over the FY 2019 appropriation.



## Negotiated Salary Increases

The FY 2020 budget includes funding for estimated wage increases for all collective bargaining units and non-union positions, including both step increases and cost of living adjustments (COLA). The current status of collective bargaining agreements and corresponding expiration dates can be seen below:

| Bargaining Unit     | Contract Term           |
|---------------------|-------------------------|
| LEA: Unit A         | 09/01/2019 – 08/31/2022 |
| LEA: Unit C         | 09/01/2018 – 08/31/2021 |
| LEA: Unit D         | 07/01/2018 – 06/30/2019 |
| LEA: Tech           | 07/01/2015 – 06/30/2018 |
| ALA: Administrators | 07/01/2017 – 06/30/2018 |

## Enrollment Increases and Corresponding New Positions

During the past five years, K–12 enrollment at the Lexington Public Schools has increased by 608 students (+9.24%), or an average of 124 students per year (or 1.83% per year). These past increases have had a direct impact on the School Department’s operating budget each year to accommodate these new students and maintain the level of programming offered by Lexington Public Schools.

To better understand future enrollment trends, five-year enrollment is projected for elementary, middle, and high school, incorporating new enrollments from October 1, 2018. For the purposes of this budget, a version of the Cohort Survival Method is used, which is one of multiple models the district runs each year. In this version, future kindergarten enrollments are estimated using the five-year average of previous kindergarten enrollment. Average grade-to-grade progression rates are then applied to the rest of the grades. Similar one-year school-level projections are used to plan staffing and other resource allocations for each specific school.

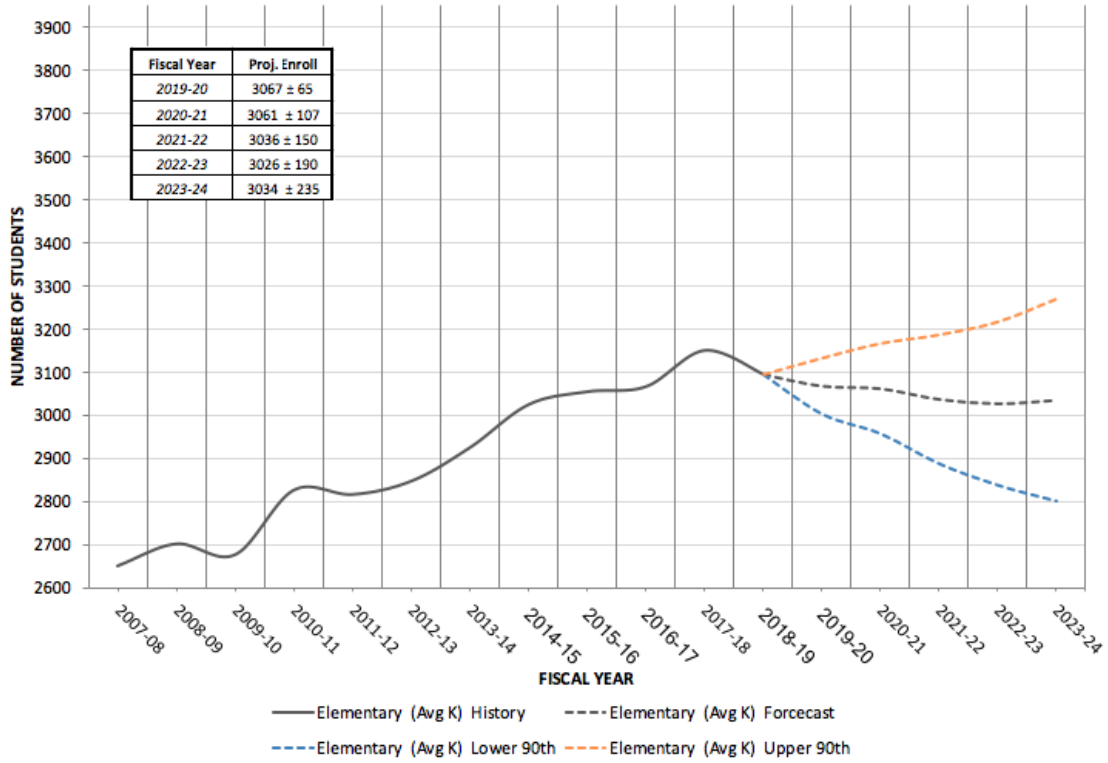
Although enrollment projections can offer insight about the direction of future enrollment trends, they should not be viewed strictly as a point estimate, as this does not accurately acknowledge the uncertainty associated with projections. In recognition of this reality, 90% confidence intervals are produced for all enrollment projections. Correct interpretation of such intervals is that there is 90% chance that the confidence interval contains the true value of future enrollment.

Another important consideration is a review of prior Lexington Public School enrollments and projections suggests that future elementary enrollment may be underestimated with this model. Both this and the inherent uncertainty of enrollments should be kept in mind while planning for future school years.

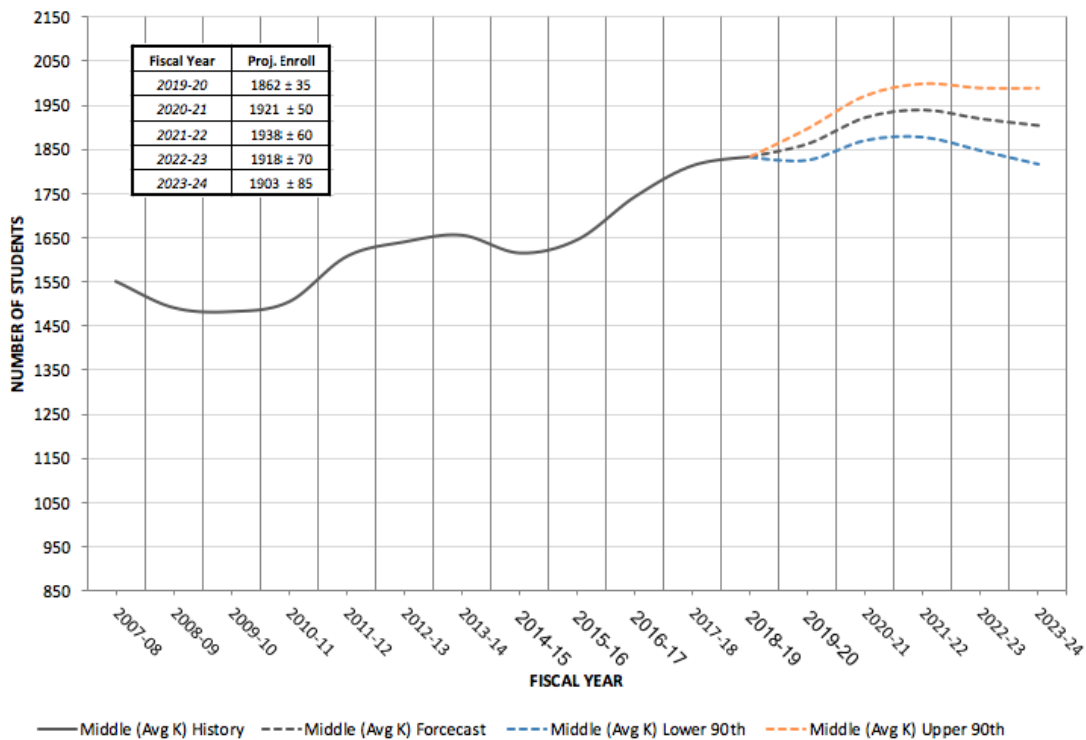
One way flexibility is incorporated into the budget is by having unallocated reserve full-time equivalent positions (FTEs) for both general education and special education. The proposed budget includes a reserve of 3.0 FTE professional positions for General Education, a reserve of 3.0 FTE professional positions for Special Education, and a reserve of 1.6 FTE paraprofessional positions for Special Education. Additionally this budget recommends an increase of 5.5 FTE professional positions to Lexington High School where FY 2020 enrollment growth is anticipated to be approximately 85 students (+/- 30).



**Elementary School Enrollment: History and Forecast for FY 2020 to FY 2024 (CSM)**

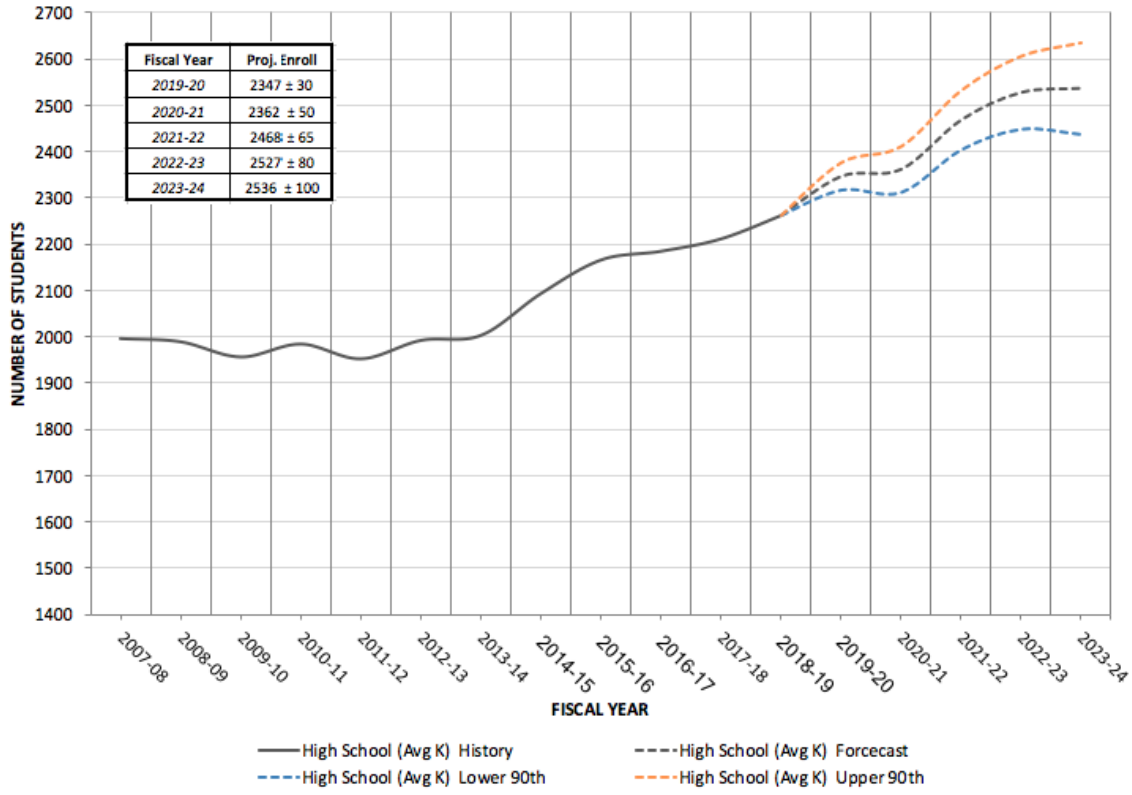


**Middle School Enrollment: History and Forecast for FY 2020 to FY 2024 (CSM)**





**High School Enrollment: History and Forecast for FY 2020 to FY 2024 (CSM)**



In order to address the increasing enrollment projected for FY 2020, additional positions are included in the recommended budget. A total of 25.3 FTE are linked with the increasing Lexington enrollments (including mandates for Special Education), and the necessary staffing needed to maintain the quality and level of service. In total, the recommended increase in staffing for the 2020 budget year is 26.63 FTE. A summary table of position changes is included below with additional detail included in the *Recommended Budget* section of this document:

| Category                         | Program Line                 | Sum of FTE    |
|----------------------------------|------------------------------|---------------|
| Base                             | Bridge                       | (1.00)        |
| <b>Base Total</b>                |                              | <b>(1.00)</b> |
| Mandate                          | PreK-22 Special Education    | 5.56          |
| <b>Mandate Total</b>             |                              | <b>5.56</b>   |
| Enrollment                       | Health Services              | 1.60          |
|                                  | K-12 Counseling              | 1.00          |
|                                  | K-12 ELL                     | 1.60          |
|                                  | K-12 Performing Arts         | 0.73          |
|                                  | K-5 Science                  | 0.56          |
|                                  | Lexington High School        | 1.00          |
|                                  | Lexington High School        | 5.50          |
|                                  | PreK-22 Special Education    | 4.66          |
|                                  | Print Center                 | 0.10          |
|                                  | Transportation               | 0.13          |
|                                  | K-12 Curriculum              | 3.86          |
| <b>Enrollment Total</b>          |                              | <b>20.74</b>  |
| Program Improvement              | K-12 PE/Wellness             | 0.20          |
|                                  | K-5 Science                  | 0.13          |
|                                  | Superintendent/ School Comm. | 1.00          |
| <b>Program Improvement Total</b> |                              | <b>1.33</b>   |
| <b>Grand Total</b>               |                              | <b>26.63</b>  |



## The Collective Goals of the School Committee & Superintendent (2018–2020)

### AN OVERVIEW

### Goal-Setting and the Superintendent Evaluation Process

In 2012, the Massachusetts Department of Elementary and Secondary Education (DESE) developed a new educator evaluation process for all teachers, administrators, and school superintendents in the Commonwealth. The method is based on a five-step cycle of self-assessment, goal-setting, implementation, and formative and summative evaluations. An educator's performance is measured against a possible four (4) standards, 41 indicators, and 21 elements. Superintendents are required to submit one measurable professional practice goal, one measurable student learning goal, and two district goals developed collaboratively with school committee members. The school committee is not required to evaluate the superintendent on all 62 indicators and elements; instead, superintendents and school committee members are encouraged to work together to identify which standards, indicators, and elements they will use in the superintendent's annual evaluation.

In 2012, the Massachusetts Association of School Committee (MASC) developed a Superintendent Evaluation Guide to show how the superintendent and school committee could work together to create goals that inform the superintendent evaluation process.

"The first step of the five-step cycle is to review the entire system and begin a process for the superintendent. This includes having the school committee and superintendent come to agreement around the standards, rubrics, evidence of performance, and goals built around the state standards as well as personal, professional goals."

The four (4) goals identified on the following pages are aligned to the MA DESE standards and indicators and reflect our consolidated priorities. The goals, strategies, timeline, and evidence provide a rich source of data that will inform the superintendent's annual evaluation. Our mutual goals reflect our deep commitment to working collaboratively and in the best interests of the young people we serve. The framework that follows represents a blueprint for the collective efforts of many in the district, and we wish to extend our heartfelt appreciation to the educators who work tirelessly on behalf of our children.

### Professional Practice Goal #1: Community Outreach

*Goal #1: By June 2019, the superintendent will meet with 100% of identified stakeholders to develop an understanding of the experiences, beliefs, attitudes, and values that shape the Lexington school community.*

#### Self-Assessment/Reflection

On July 1, 2018, I was appointed the new Superintendent of Schools in Lexington. Since then, I have worked to learn as much as possible about all Town stakeholders, including those affiliated with both the municipality and our schools. As the new leader of Lexington Public Schools, there is nothing more important than hearing the perspectives and understanding the viewpoints of all our constituents; hence, this professional practice goal focused on community outreach. It takes little effort to organize entry meetings with stakeholders, but actively listening to one's school community and developing plans to address the consistent themes and patterns heard takes time. Slowly, I have begun to learn more about the hopes and dreams of our students, parents, teachers, administrators, and Town leaders. School committee members and others have offered their advice on people with whom I should speak, and my community outreach grows. In the coming days, weeks, and months, I hope to establish a culture of mutual respect and trust that is necessary to serve all children well. The first step in



creating a respectful culture and climate and forging a pathway to the future is to reach out to a diverse group of constituents in the community.

To lead effectively, I must be able to answer questions such as: What are the experiences, beliefs, attitudes, and values that shape our school community? Given the competing demands and the often inconsistent nature of educational systems, how can we establish a sense of alignment, coherence, and unity? What are the problems to be solved and what are the hopes and dreams to be realized? A "community outreach" professional practice goal will help the superintendent gain an intimate understanding of the community and the ability to work collaboratively with the school community to preserve what works in Lexington, to problem-solve and refine those aspects of our work that need attention, and to create new possibilities that ultimately will better serve our students.

**Strategies, Timeline, Evidence, and Alignment**

| Goal #1: Community Outreach   |                 |  |
|---|-----------------|--|
| Strategy  | Timeline        | Evidence   |
| <b>1.1</b> Hold individual meetings with all Town administrators to learn how the municipality functions in Lexington.  | Sept.–June 2019 | A list of entry interview dates with Town administrators.                                    |
| <b>1.2</b> Meet with 20+ community groups to develop a shared understanding of Lexington's core values and beliefs.   | Sept.–June 2019 | A list of community groups with whom I have met and a brief synopsis of each discussion.     |
| <b>1.3</b> Attend a faculty meeting in each of the ten schools to get to know educators.  | Sept.–June 2019 | A copy of written principal observations for the ten faculty meetings I attended.            |
| <b>1.4</b> Conduct site visits to each of the ten schools.  | Sept.–June 2019 | A copy of written principal observations for the ten site visits.                            |
| <b>1.5</b> Shadow three Lexington High School students (e.g. Asian, Boston, LGBTQ, CP1, CP2, Honors/AP, etc.), for a full day to (1) gain a student's perspective; (2) to observe teaching and learning at LHS in a wide variety of settings. | Sept.–June 2019 | A reflective journal entry to chronicle my experiences shadowing three diverse LHS students. |

**Alignment:** Standard I: Instructional Leadership, Indicators 1-B-1 Instructional Practices; 1-D-2 Observations and Feedback; Standard III: Family Engagement; III-A-2 Community and Business Engagement.

**Student Learning Goal #2: Diversity, Equity, and Inclusion**

*Goal #2: By June 2020, there will be a 20% increase in inclusive and equitable practices, opportunities for students to learn with their peers, and in time-on-learning.*

**Self-Assessment/Reflection**



In the fall of 2018, the Superintendent and LPS Administrators' Council developed a 37-page position paper called, "Diversity, Equity, and Inclusion: Our Call to Action." The purpose of the report was to engage the Lexington school community in our collaborative effort to problem-solve, address, and monitor progress toward creating an inclusive and equitable environment for all.

"Our Call to Action" is an enormous undertaking, and the diversity, equity, and inclusion ("DEI") efforts described in the body of the paper could be considered a comprehensive strategic plan all its own. Inclusion is a topic that is at the core of our "DEI" effort, which is why we chose to make it the basis of our student learning goal. Shortly after the superintendent's arrival on July 1, 2018, parents of children in the Developmental Learning Program (DLP) expressed concern that the time their children are included in the general educational setting is decreasing, not increasing. They cited data to underscore their belief that while inclusive practices are expanding statewide, children entering the elementary DLP program in Lexington tend to spend less time with their peers in the general education setting than they did in pre-kindergarten.

Researchers Thomas Hehir, Laura Schifter (2012), and others have written about the academic and social benefits of inclusion for all. Moreover, in the research Schifter conducted in Massachusetts, "the results showed that the probability that a student with a high-incidence disability (such as a learning disability) in a full inclusion placement graduated on time was about 84 percent, whereas an otherwise similar student in a substantially separate placement had a probability of 43 percent."

Our philosophy is that inclusion benefits all students. Children should begin in the general education setting and move to a more restrictive environment only when necessary. We also believe that our profession must rethink disciplinary practices by ensuring that if punished, students are still learning. Far too often in education, we suspend students for skipping school, which most recognize as a counter-intuitive practice. Instead, we should increase classroom management and training opportunities for educators and administrators, adopt positive interventions and approaches, and implement restorative practices designed to educate students to right their wrongs and learn from their mistakes.

Although our overall suspension rates are relatively low (a total of approximately 60 suspensions at LHS for the entire 2016–2017 school year), there is a significant gap between students of color and students with special needs compared to their counterparts, which mirrors state and national trends. In 2016–2017, African American/Black students were a little more than four times more likely than White students to have one or more suspensions, and students with disabilities were just over two and a half times more likely to have one or more suspensions.

While a 20% increase in inclusive practices may be an ambitious goal, we hope to make progress toward increasing inclusive practices in two ways: (1) by increasing the time students in the DLP program are included in the general educational setting; and (2) by decreasing the number of disproportionate suspensions for students with special needs and for students of color (thereby, increasing time on learning).

**Strategies, Timeline, Evidence, and Alignment**

| Goal #2: Diversity, Equity, and Inclusion   |              |                      |
|---|--------------|----------------------|
| Strategy  | Timeline     | Evidence             |
| <b>2.1</b> Conduct an equity audit to understand current strengths and opportunities for improvement in the district, in schools, and classrooms. | January 2019 | Equity Audit Report. |





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| <b>2.2</b> Superintendent organizes a Community Input Team to problem-solve matters related to diversity, equity, and inclusion.  | December 2018   | CIT agendas and minutes.   |
| <b>2.3</b> Calculate the amount of quality time students in the DLP program are spending in an inclusive setting by analyzing students' IEPs. Develop a plan to increase the amount of quality time spent in the students' least restrictive inclusive setting. | January 2019    | A graph showing (a) the amount of quality time in DLP students' IEPs; (b) identifying other high-quality inclusive opportunities; and (c) the total increase in quality inclusion over time. |
| <b>2.4</b> Communicate the district's response to the consultants' recommendations and progress made on the DLP audit that occurred last year.  | November 2018   | A Status Report on the DLP Audit/Evaluation.   |
| <b>2.5</b> Develop a common language and consistent approach to recording and responding to disciplinary infractions between grade spans to develop a baseline.   | January 2019    | A database of common disciplinary infractions and guidelines.  |
| <b>2.6</b> Provide professional learning in culturally responsive pedagogical practices and alternatives to discipline, such as restorative circles.  | Sept.–June 2019 | A comprehensive list of high-quality professional development offerings on diversity, equity, and inclusion.   |
| <b>2.7</b> Select a protocol and implement a monthly LPS Administrators' Council case study conversation to examine our practices and explore disciplinary alternatives together.   | November 2018   | A copy of the protocol and minutes from LPS Administrators' Council meetings.  |
| <b>2.8</b> Work with all LPS Administrators' Council members to write a DEI goal and monitor progress toward attaining the goal.  | Sept.–June 2019 | Superintendent's feedback on administrators' goals.  |
| <b>2.9</b> Hold LPS Administrators' Council meetings in schools throughout the year with host principals taking the lead and sharing their DEI work with colleagues.  | Sept.–June 2019 | An analysis of disciplinary data by school and a calculation of any increases in time-on-learning.   |
| <b>3.0</b> Hire a consultant to share best practices and assist teachers with inclusive practices.  | Sept.–June 2019 | A compendium of educator reflections.  |

**Alignment:** Standard I: Instructional Leadership; Indicators:1-C-2 Adjustment to Practice; 1-D-1 Educator Goals; I-E-1 Knowledge and Use of Data; 1-E-2 School and District Goals; Standard II: Management and Operations; Indicator II-A-3 Student Safety, Health, and Social and Emotional Needs; II-C-1 Time for Teaching and Learning; II-C-2 Time for Collaboration; IV-A-3 Meetings.



## School Committee & Superintendent Goal #3: Strategic Planning

*Goal #3: By September 2019, work with the community to develop a comprehensive 5-year strategic plan that includes a vision, mission, core values, goals, strategies, and indicators of success, charting the course for the future of the Lexington Public Schools.*

### Self-Assessment/Reflection

Seneca, the Younger, once said, "If one does not know to which port one is sailing, no wind is favorable." No words could capture more eloquently the need for a thoughtful and purposeful plan than those of the great Roman philosopher. It is interesting that some find the planning process a colossal waste of time, energy, and effort, arguing that more effort should go into the work rather than the planning. While these naysayers have a point about the need for an organization to focus on the work at hand, we need only examine what happens in the absence of a plan to understand the benefits. When decisions are made without context, we waste precious resources. Tension mounts as individuals make up their own rules in the absence of a good road map. Leaders earn criticism for making foolish decisions in a vacuum, one after another, with no insight into how a particular choice fits into a larger vision in the broader context.

As it turns out, plans do matter. And not just any sort of plan, but meaningful, cohesive, integrated plans linked together through a common purpose, a shared vision, and a thoughtful process. In Lexington, no strategic plan—or for that matter master facilities plan—exists, although it appears that there have been previous attempts to create one. For example, the district website still links to the "LPS Core Values" that "represent the essential and enduring commitments of the Lexington Public School community." The stated core values include (1) academic excellence; (2) respectful and caring relationships; and (3) a culture of reflection, conversation, collaboration, and commitment to continuous improvement." Two hyperlinks follow the statement above: one labeled "district goals" and the other labeled, "system goals." One statement under "district goals," underscores the urgent need to address rapid increases in enrollment. The "system goals" link includes school improvement plans, the former superintendent's goals, and a mission and vision statement from March 2013. There is little evidence of the utilization of the March 2013 document, which contains interesting ideas related to creativity, perseverance, intelligence, and globalization.

### Strategies, Timeline, Evidence, and Alignment

| Goal #3: Strategic Planning   |               |   |
|---|---------------|---|
| Strategy  | Timeline      | Evidence  |
| <b>3.1</b> Develop an LPS Strategic Planning Timeline.  | December 2018 | LPS Strategic Planning Timeline.  |
| <b>3.2</b> Work with the community to develop a Master Facilities Plan to proactively address enrollment increases and decreases, creating the flexibility necessary for thoughtful decision-making and advocacy concerning capital expenditures. | July 2019     | Agendas and minutes from strategic planning and master facilities planning efforts. |



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| <b>3.3</b> Integrate the Master Facilities Plan into the LPS Strategic Plan.                                       | August 2019 | Finalized Master Facilities and Strategic Plans.   |
| <b>3.4</b> Integrate the " Diversity, Equity, and Inclusion: Our Call to Action" plan into the LPS Strategic Plan. | August 2019 | Finalized Diversity, Equity, and Inclusion: Our Call to Action" position paper and Strategic Plan. |
| <b>3.5</b> Launch the LPS Strategic Plan at the 2019 LPS Convocation on the first day of school for educators.     | August 2019 | Agenda for the first day of school for educators.  |

**Alignment:** Standard III: Communication; III-C-2 Culturally Proficient Communication; Standard IV: Professional Culture; Indicator IV-A-1 Commitment to High Standards; Indicator IV-A-2 Mission and Core Values; Indicator IV-C-1 Communication Skills.

### **School Committee & Superintendent Goal #4: Promoting Student Learning, Engagement, and Well-Being in our Schools**

*Goal #4: By September 2019, develop a thoughtful, integrated, and cohesive SEL Plan that links to the strategic plan and clearly articulates the district's vision and strategy for ensuring the social and emotional well-being of all Lexington students.*

#### **Self-Assessment/Reflection**

When the Lexington superintendent interviewed for her position, the job description emphasized students' Social and Emotional Learning. At the time, she asked how the Lexington school community defines Social and Emotional Learning (SEL), and she learned that there was an opportunity for further growth in this area. During her interview, she was asked to speak to her vision for LPS and based on the research she conducted, she created a preferred future based on balance: "For every child, a hungry mind and a happy heart." She also developed a possible framework for a strategic plan, embedding the philosophical tenets of Socrates into an integrated structure for social and emotional learning.

"Social and emotional learning" has been a buzzword that has captured the interest of cities and towns across Massachusetts and our nation in recent years. As student needs became more complex and resources diminish, various organizations (e.g., the MA Association of School Superintendents and the MA Association of School Committees) have adopted SEL resolutions, encouraging administrators, educators, legislators, and elected officials to prioritize the health and well-being of our children. In her role as the former President of MASS, the superintendent highlighted the potential unintended consequences of an overemphasis on SEL and the need for a thoughtful approach in order to help students learn the skills necessary to thrive in a global world and become the people they wish to be.

A holistic approach to education is a concept as old as time. Plato wrote about the importance of social and emotional learning in *The Republic* and organizations like Collaborative for Academic, Social and Emotional Learning (CASEL) suggest that SEL comprises five core competencies, including (1) self-management; (2) self-awareness; (3) social awareness; (4) relationship skills; and (5) responsible decision-making. While this may not be the definition of SEL we choose for Lexington, at the very least it provides a starting point for a discussion about the types of relational skills we hope to cultivate.



Recently, the school committee and the superintendent engaged in a conversation about "unfinished business" and what problems we hoped to resolve through initiatives that began last year. Ultimately, we endeavored to understand what we mean here in Lexington when we say, "social and emotional learning." After some healthy discussion and debate, we realized that SEL efforts of the past were designed to address what Marc Brackett, Ph.D., the Founding Director of the Yale Center for Emotional Intelligence, calls the three most common student descriptions of their school experience: (1) stress, (2) boredom; and (3) tiredness. Interestingly, these are common concerns that Lexington students consistently express through the Youth Risk Behavior Survey data. We recognize that in education and elsewhere human beings tend to gravitate toward the negative as a first step toward gaining a clearer understanding of what problem we are trying to solve. We decided to capture our preferred future or educational vision for students with three positive words: student learning, engagement, and well-being.

**Strategies, Timeline, Evidence, and Alignment**

| Goal #4: Promoting Student Learning, Engagement, and Well-Being in Our Schools  |                 |   |
|---|-----------------|---|
| Strategy  | Timeline        | Evidence  |
| <b>4.1</b> Develop a job description and hire a Director of Student Equity, Safety, and Supports (title TBD), an administrator with a student-focus who oversees safety, civil rights, wrap-around services, and students' social and emotional well-being. | February 2019   | A job description and recommendation for Director of Safety and Student Equity. |
| <b>4.2</b> Work with administrators and educators to develop an operating definition of what we mean by social and emotional learning in the Lexington Public Schools.  | Sept.–June 2019 | An operating definition of SEL for Lexington.                                   |
| <b>4.3</b> Integrate efforts to promote greater student learning, engagement, and well-being into high-quality LPS professional development offerings.  | Sept.–June 2019 | A compendium of high-quality SEL professional development offerings.            |



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| <p><b>4.4</b> Bring student-centered efforts undertaken in previous years to completion through the following actions:</p> <p>(a) guide the work and provide the tools to enable the school committee to make a final decision on a later start for high school students (December 2019).</p> <p>(b) meet with students, parents, and teachers to understand the practical implications of the new Homework Policy and work with the school committee to explore possible changes (June 2019).</p> <p>(c) analyze Estabrook's alternative homework pilot and make a recommendation to the school committee on whether or not the pilot should expand (June 2019).</p> <p>(d) identify and articulate the connections between project-based learning (PBL) and social and emotional learning (SEL) and develop an implementation plan per grade level.</p> <p>(e) successfully implement the Town's joint mental health initiative.</p> <p>(f) include the World Languages study in the FY 2020 school budget and consider whether an earlier exploration of languages could help promote student learning, engagement, and well-being.</p> | <p>August 2019</p> | <p>Recommendations, presentation, and SC agendas, minutes, and a final vote.</p> <p>A refined Homework Policy and implementation plan.</p> <p>A proposal to the SC on whether or not to expand the Estabrook homework pilot.</p> <p>A practical PBL implementation plan with differentiated expectations and supports for each grade-span.</p> <p>Agendas and minutes from the Town's joint mental health initiative.</p> <p>Explore World Languages in the strategic planning process to gauge whether it is a school community priority.</p> |
| <p><b>4.5</b> Develop a High School Community Input Team to explore course sequences (e.g., Science) and high school graduation requirements.</p>  | <p>August 2019</p> | <p>A HS-CIT Report outlining findings of study on course sequence and graduation requirements.</p>   |

**Alignment:** Standard III: Family and Community Engagement; Indicator III-B1 Student Support; Standard IV: Continuous Learning; Indicators IV-B-1 Policies and Practices; IV-C-1 Communication Skills; IV-E-1 Shared Vision Development; IV-F-3 Consensus Building.