

Special Education and Populations Task Force

Executive Summary

The Special Education and Populations Task Force of the Schools Subcommittee of the Override Study Committee (“SEPTF”) is charged with reviewing the operational, cost and revenue impacts and opportunities in the Special Education and “optional” (or “non-mandatory”) population areas of the School Department. SEPTF’s analyses have focused on the financial aspects of and the impact of possible changes to these programs.

While the provision of a ‘free and appropriate education’ (“FAPE”) to every school-aged resident is mandated by State law, the delivery of FAPE to children not considered ‘typically developing’ involves programmatic choices that do have costs associated with them and that may offer opportunities for efficiencies or more accurate cost-sharing in the future. In addition, the PSB makes choices to enroll non-resident students (METCO and Materials Fee) and offer certain programs and make certain operating decisions (full-day kindergarten, early education for typically developing children, provision of cost free space for extended day programs and after-hour building usage) that either impact resource demands for professionals, para-professionals and space or represent economic opportunities that could be more fully realized.

SEPTF’s focus on financial matters in no way implies that these programs are not considered highly valuable in non-financial terms by the Brookline community. For example, METCO has deep support among many Brookline residents and families with children in the PSB; as a result any changes to METCO enrollment policies in Brookline are likely to be controversial.

The Task Force strongly urges that, when available, its entire report be read in conjunction with this Executive Summary.

Non-Resident Populations Findings

Policies and Economics:

1. The METCO and Materials Fee programs that create demand for space and staff resources throughout the school system. The programs currently place approximately 470 students in the Brookline school system.
 - a. METCO has a current target population of 300. The PSB indicates that incoming METCO classes of 20 children are about 45% African-American/Black, 45% Hispanic/Latino and the balance other races. With the PSB estimate of the Black and African-American resident population at 3%-5% of total enrollees per kindergarten class, METCO represents a range of

approximately 23%-33% of incoming kindergarten Black and African-American students.

- b. Materials Fee has a current population of about 175 with strong recent growth (up 78% in the last 8 years) and no limit on its population. The racial composition of Materials Fee students is about 77% white and the balance other races.
2. A substantial majority of the Task Force believes that the School Department's policy guidelines condition non-resident student enrollment in the Brookline Public Schools on the following: (a) that space (i.e., "seats") is available; (b) in the case of Materials Fee students, that staffing levels be set "on the basis of tuition paying or resident students," (c) again in the case of Materials Fee students, that "[t]he cost of special education services ... will have to be borne by the employee's town or city of residence, or by the individual,"¹ and (d) upon the availability of funds for the METCO program from the Massachusetts Department of Education. The METCO program guidelines provide that placement decisions are to be based upon "district grade and seat availability" in school districts "with openings for the particular grade level needed."
 3. A substantial majority of the Task Force believes that the School Administration is not following these policy guidelines. To the extent the guidelines are not being followed it may reflect a decision by the School's that places the value of the continuation of the programs 'as-is' ahead of the policy guidelines.
 4. Options exist for the Schools to follow the guidelines and to modify either or both Materials Fee and METCO to help reduce enrollment pressure in the intermediate term without permanently eliminating either of these valued, and valuable, programs. Modest use of these options, combined with one or more changes to other enrollment management policies (buffer zone, assignment timing and class size policies) increase the likelihood of reducing classroom need relative to the School Department's forecast.
 - a. The impact on the racial composition in classrooms or at the school level would depend on the scope of modifications to METCO. The same is true system-wide, with greater impacts over the intermediate and long term.
 - b. The impact of modifying the Materials Fee program on professional staff hiring and retention is not known.
 - c. The short-term (1-3 years) financial implications of modifications to non-resident programs are dependent on the scale of changes and whether they are combined with other options, such as class size or other adjustments.
 - d. In the intermediate term (3-5 years) depending on the scope of the modifications, changes could have a meaningful impact on space demands

¹ The Task Force notes that the Superintendent has indicated that Town Counsel has stated this guideline may not be legally enforceable.

and begin to have a noticeable impact on operating expenses, particularly if coupled with other options at the disposal of the School Department.

5. The OSC agreed to adopt \$15,000 as a reasonable estimate of the long-run incremental cost of an average additional student. The task force concludes that the long-run incremental cost of educating non-resident students is consistent with this estimate which therefore represents the average additional cost net of offsetting revenue associated with an individual child in these programs. These costs recognize the fact that in a period of sustained growth in the student population, additional students, resident or non-resident, require comparable resources and thus impose similar levels of additional capital and other capacity-related costs.
6. Viewed on the basis of these long-run incremental cost estimates, the METCO and Materials Fee programs together represent a commitment of more than \$7 million per year by the Town and the PSB. Assuming a de facto commitment to ensure enrollment through high school graduation, each entering cohort of 40 non-resident kindergarteners amounts to a financial commitment by Brookline part of approximately \$8 million over the 13 years until graduation, above and beyond a commitment of approximately \$53 million for non-resident students already in the system. On a present value basis, continuing the two programs 'as-is' amounts to a financial commitment by the town of approximately \$106 million over a 13 year period. (See Appendix, The Economic Impact of Enrollment Growth of the Brookline Public Schools).
7. METCO receiving districts have not been reimbursed at rates sufficient to cover the cost of the program and state funding has declined, particularly on an inflation adjusted basis, in recent years. As a result, the long-run incremental costs shifted from Boston to Brookline as a result of the METCO program are more than \$4.4 million annually. Long-term lobbying efforts by METCO and receiving districts aimed at increasing the level of state reimbursement have thus far been ineffective.

Options

The Task Force's charge of reviewing the operational, cost and revenue impacts and opportunities included instructions to explore and present numerous options to contain or reduce school enrollment as costs are a direct function of enrollment. The Task Force would highlight that these are only options and not recommendations. They are but one set of ideas that could lead to certain outcomes and are not intended to be all inclusive or exclusionary of other methods to achieve similar results. In addition, no suggestions have been reviewed to determine their legality or enforceability. Please read the entire final report of the Task Force for additional information. In presenting these options below, the Task Force underscores that it does not endorse any approach that would 1.) affect any child, or the already-born sibling of any child, currently enrolled in the PSB or 2.) could reasonably be foreseen as resulting in the elimination of either program.

Materials Fee

A. Do Nothing

B. Options to Affect Population

- a. Have a cap on the absolute number of Materials Fee slots made available, in total and in any given year.²
- b. Reduce or temporarily suspend new entrants to the Materials Fee Program: Over time, this would lessen classroom demand by approximately 1 classroom per grade as the impact of reducing new entering kindergarten classes by approximately 20 (and growing) students per year works its way through the system.
- c. Make enrollment of new Materials Fee kindergarten students a function of projected resident registration using early registration data as a guide. Experience has shown that resident kindergarten registration increases by approximately 40% during the enrollment period.³ Prior to the start of kindergarten registration, PSB would determine the maximum number of entering kindergarten students that could be accommodated without creating additional classrooms.⁴ These formulas could be adjusted throughout the spring and summer as the resident registration picture more clearly reflected the space available for non-resident students in the system without the need for additional classroom construction.
- d. Eliminate the Materials Fee program for all Town employees; limit access to full-time teachers or full-time teachers who live more than a to-be-determined distance from Brookline; or other select populations such as full-time teachers after the employee has been employed for a minimum of a to-be-determined number of years, or educational specialties where 'additional compensation' may be needed to attract teachers with appropriate experience and expertise.

C. Other Options

² If the number of openings was reduced as set forth here and in subparagraph c, selection could be random, first-come-first-served or based on objective factors, including PSB needs, such as those outlined in subparagraphs d and e.

³ During 2011-2013 time period, the resident enrollment as of September 1st was 36% more, on average, than the early registration figure as of February.

⁴ If, for example, the target kindergarten size is 590, and actual registration grows by 40% between February and September, no new non-resident students would be admitted if initial resident registration were 420 (590/1.4) or higher unless PSB could make other adjustments to accommodate additional students. If resident early registration was 390, up to 30 non-resident students could be admitted. The PSB would have the option of making other adjustments to accommodate additional non-resident students. For example, an increase of average class size by 1 student spread over 25 classrooms would permit the admission of 25 additional non-resident students, while an adjustment in the average of 1.5 students per class would be equivalent to opening up 37 new "seats."

- a. The PSB indicates that the Materials Fee program assists in the hiring and retention of staff but there is no empirical evidence available to confirm that assertion. The School Department, and the Town, should strive to better understand whether this program has led to desired recruitment and retention outcomes. They could also take steps to understand why, when offers are given and turned down, applicants determine to not accept a position in Brookline.
- b. The School Department should consider using the flexibility allowed in its policies on admissions and placements, which provide for admissions of children of teachers to be decided no later than June 1, rather than in February as is now the case, and of children of other Town and School employees to be decided no later than June 20.

METCO

A. Do Nothing

B. Options to Affect Population

- a. Partially reduce incoming METCO Cohorts to help reduce classroom demand.
- b. Make enrollment of new METCO kindergarten students a function of projected resident registration using early registration data as a guide.⁵ These formulas could be adjusted throughout the spring and summer as the resident registration picture more clearly reflected the space available for non-resident students in the system without the need for additional classroom construction.
- c. Lower the target METCO population from 300 to a number that would, in combination with other options, help to meaningfully impact demand over the next five years.

C. Other Options

- a. Intensify legislative lobbying efforts to obtain additional funds.
- b. Have the School Department accept new students and make allocations to individual schools for METCO children as late as possible.
- c. Modify participation in METCO until the Legislature funds the program on a basis equal to levels closer to historical METCO funding levels adjusted for inflation plus funds some reimbursement for the special needs services provided to the METCO population.

Special Education Findings

⁵ See Footnotes 3 and 4 above.

1. The Special Education area of the PSB accounts for about 21% of the total school budget. Despite this rather substantial expense, the Task Force has not identified any meaningful opportunity to reduce costs or improve efficiencies and notes that the PSB seems to be doing an excellent job of transitioning the system in the face of ever increasing state and Federal mandates.
2. While understanding that not all decisions can be reduced to dollars and cents, the Task Force does, however, believe that the PSB could and should do a more thorough job of comparing the explicit, and implicit, costs and benefits of certain choices it makes. Examples would include items such as incorporating the financial impact of space requirements and ensuring that analyses are done on a fully loaded cost basis.

Full Day Kindergarten Findings

1. The PSB has options including charging for full-day kindergarten and offering fewer than five days of full day kindergarten.
2. With respect to the former, there is a substantial likelihood that increased revenues from Brookline parents could be largely offset by forgoing available increases in State aid (Chapter 70 aid).
3. However, once Brookline has reached its target Foundation budget for Chapter 70 State aid, this risk would be diminished and the PSB can continue to evaluate this option (as it has been doing on a periodic basis).

Early Education and After School Building Use Findings

1. The Task Force has identified and formally recommended several prospects for revenue enhancement for the PSB and the Town. These opportunities fall broadly into the areas of tuition increases and usage fees for Town and School programs and properties. The task force recognizes that any tuition or user fee increases will impact the affordability of programs for lower income families, some of whom currently receive financial aid. The precise extent to which higher fees might in fact allow for a greater number or higher levels of scholarships is not known.
2. While many of the situations identified by the Task Force have either been targeted or identified already, the Task Force has concluded that both the PSB and the Town can and should be more aggressive with their approach to revenue generation from Brookline Early Education Program, Soule Recreation Center Education Program, after-school gymnasium and public space rentals and charges for use of public buildings by extended-day programs.
3. While there remains substantial additional work to do to finalize financial projections and opportunities, the Task Force believes, at this juncture, that over the

next five years, the PSB and the Town could generate substantial income from these ideas over and above what the programs currently generate. Currently this analysis explicitly ignores planned increases by the Schools and the Town for BEEP and Soule and also explicitly ignores likely annual increases for inflation and market competition. It also assumes that the charges for Soule, whether realized by Rec or the PSB, would not violate any rules regarding user fees and cost recoveries. The following table summarizes this opportunity:

	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019
Extended Day Rent ⁶	\$171,500	\$171,500	\$171,500	\$171,500	\$171,500
Increasing ⁷ BEEP Fees	\$147,000	\$250,000	\$250,000	\$250,000	\$250,000
Increasing Soule Fees ⁸	\$468,722	\$375,902	\$257,054	\$257,054	\$257,054
Baldwin Rent ⁹	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000
After School Gym and Facilities Usage ¹⁰	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Total	\$1,012,500	\$1,022,402	\$903,554	\$903,554	\$903,554

⁶ Reflects \$24,500 per program and is approximately \$18 per month for a full-time participant.

⁷ Assumes a 10% increase per year until market levels are reached

⁸ Reflects revenue potential over and above currently scheduled increases at Soule

⁹ Reflects rent at \$25,000 per year

¹⁰ Reflects estimate of income available from winter sports only.